BUILDING TRUST THROUGH ACTION LEARNING IN AN UNCERTAIN TRANSORGANIZATIONAL CONTEXT

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Abstract

This research explored how action learning contributed to the development of trust in a temporary transorganizational system during the beginning of COVID-19. In a world fragmented by digitalization, social upheaval, ethnocentric development policies, and global pandemics, trust among people, companies, and governments has eroded. The interdependencies within our society demand collaborative efforts that must not only address the challenges of fragmentation that makes coordinate task achievement difficult, but the uncertainty that comes with lack of trust.

This was the challenge for two universities on different continents and their stakeholders: to create a cross-cultural, temporary transorganizational (TS) system at the beginning of the COVID-19 pandemic and deliver on the educational objectives of a master's-level Organization Development (OD) practicum. The cyclical rhythms of action learning and trust building before and during the practicum contributed to its outcomes of collective knowledge creation and high performance in an uncertain time. Using theories of trust formation and action learning, the authors identified how action learning and trust cycles worked together in a TS system to foster collaboration.

INTRODUCTION

On March 11, 2020, The World Health Organization declared COVID-19 a global pandemic (Ghebreyesus, 2020). The crisis spread swiftly creating uncertainty between employees and their workplaces, disrupting global supply chains, and restricting international travel. In a world already fragmented by digitalization, social upheaval, and ethnocentric development policies, the pandemic further eroded notions of trust. It exacerbated suspicion and blaming between nations, revealed glaring gaps between developed and resource-constrained countries, and fostered mistrust between haves and have nots, races, and political parties at a time when global collaboration and personal unity were required.

Prior to the global pandemic, Yström et al. (2019) suggested that cross-boundary and interorganizational collaboration had become more necessary in a modern world where interdependent economies and major social problems exist. These cross-boundary collaborations rely on social networks and the ability of individuals to communicate and interact with one another effectively. On this micro-level, the mechanisms of trust building to enable collaboration are important for solving real-world social problems and require further investigation. For the field of organization development (OD), this is familiar ground. Action research – and the related processes of action learning – are arguably a core philosophy of the field. Initiated during a backdrop of war and strained race relations (Lewin, 1944), its core assumptions regarding the taking of action and inquiry and the reflection on action by the relevant stakeholders, has become a major approach to change in education, business, and government.

The study described here used action learning in an educational setting. It focused on how two universities from different continents implemented a temporary transorganizational system (TS) to deliver a master's level OD practicum requiring close collaboration across institutions and several client organizations. As OD practitioners, the authors recognize that a key element of OD is building trust within a system, in this case between and among clients, students, faculty, and institutions. Specifically, in a transorganizational system, the need for trust in relationships is amplified because of the collaboration that needs to take place.

What became evident during this collaboration was that trust was built by behaviors that aligned closely with the steps and cycles of action learning. The research question we pursued was: *How*

does action learning enable trust in a transorganizational system formed in an uncertain context? By showing how action learning cycles and trust development are aligned, an elegant integration of two distinct research streams is proposed and represents the primary contribution of this study. By viewing action learning as the means for developing trust, solving social problems, healing fragmented relationships, and making a better world seem more approachable.

RESEARCH SETTING

This article examined how a US-based, master's level OD program (University A) formed a temporary TS with a South African-based business school (University B) and local client organizations. Students in University A's program – reflecting the 40 years of program history – had participated in five, week-long, and face-to-face sessions over 18 months. In between those sessions, the student cohort also engaged in virtual learning experiences. A wide range of topics related to OD had been addressed, including personal growth/self-as-instrument, group dynamics, organizational behavior, consulting skills, and change management as well as more macro-oriented topics, such as large-group interventions, complexity theory, strategic management, and organization design. As part of the program, the cohort had delivered face-to-face consulting products in the US, France, and Costa Rica; they were used to breaking up into consulting teams and delivering on objectives in compressed time frames. A clear and shared sense of OD processes, vocabulary, and frameworks existed. Moreover, through these experiences, the cohort members and University A faculty had developed a powerful sense of identity, trust, and purpose.

The 2020 graduating class for this program had completed all the coursework except one practicum that served as a final project and evaluation opportunity for students. This course required students to participate in a temporary TS system and complete a challenging consulting assignment. University A had worked for many years with clients in China to provide consulting and learning opportunities. The 31 students at University A were originally scheduled to travel to China in May 2020. Due to the complexity of the curriculum, University A usually started planning for this final practicum about nine months before the actual session.

When the COVID-19 pandemic began, University A's program faculty decided to move the session to an alternative location. University A faculty reached out to its alumni and higher

education networks to assess alternative locations with readily available clients while also monitoring the continued global spread of COVID-19. Alternative locations included different continents (Europe & Africa), locations in the United States (Alaska & Atlanta), and regional gatherings of students based on their different geographic locations. After reviewing potential locations, University A's lead faculty member and the professor from University B with whom he had a former working relationship agreed to collaborate.

Parallel to the search for an alternative location, the University A syllabus for the course was published. It focused on readings and assignments related to the subjects of networks, transorganizational development, and organization agility. Eventually, it included assignments exploring the history and culture of South Africa. In addition, to evoke the objectives of the course, a University A "steering committee" was established composed of students elected by the cohort to act as a referent group (Trist, 1983) in session planning, coordination, and delivery. The steering committee also included the program's faculty and five alumni advisors who served as mentors to the cohort. One of the committee's tasks was to set up consulting groups for the applied projects (which had yet to be identified). It was also tasked with evaluating the session and especially the effectiveness of the consulting projects.

The activities leading up to and during the delivery of the practicum provided an opportunity to study the development of trust across cultures, time zones, groups, and organizations. The system (Table 1) involved consulting engagements with South African clients (Table 2) guided by the steering committee. The original design was created with the assumption of face-to-face consulting work in South Africa. However, the quick spread of COVID-19 across the globe created an opportunity to conduct these sessions virtually. A virtual consulting session had not been completed within the University A or B programs before.

Table 1. *The Temporary TS Stakeholders*

Individual or Group designation	Number of people involved	Role
University A Student Cohort	31 students total	Members of the practicum, consultants to organizations, members of the steering committee
Steering Committee	6 student representatives 5 alumni advisors 3 faculty	Designs and executes the overall action learning process, including data collection
University A Alumni Advisors	5	Shadow consultants to the consulting engagement
University A Student Project Teams	6 groups of 4-5 students + 1 student steering committee member + 1 alumni advisor or faculty	Consults to client organizations
University A faculty lead and program director	2	Responsible for practicum design and delivery
University B faculty lead	1	Research advisor, content expert, point of contact
University B Facilitators	6	Liaison role between clients and University B, data collection
South Africa Client Organizations	6	Client
Total participants in the temporary TS system	54 (assuming one point of contact with the client organization)	

Table 2. *Participating Client Organizations in South Africa*

#	Company pseudo-name	Industry	No. of employees	Client	Topic
1	AgencyCo	Consumer advocacy government agency with member organizations	Less than 50	CEO and Exco	Evaluate the business model and key work processes in light of recent organizational changes
2	EngineeringCo	Manufacturer of electronic components	Over 20,000	Divisional CEO and Exco	Given an emerging product-market strategy, develop opportunities for productivity improvement and culture change
3	MiningCo	Integrated resource group, platinum group metals, chrome	Less than 1000	CEO and Exco	Build out the organizational implications of a new vision statement especially in relation to a new joint venture
4	InsureCo	Life Insurance company	Less than 50	Divisional Exco	How to get the organization's culture more aligned to an emerging customer-centric strategy
5	FinanceCo	Financial Services company	Over 20,000	Divisional Exco	Develop a strategy for the OD department to support the organization's digital, customer centric, and agility initiatives
6	AllianceCo	Economic development non-profit with member organizations	Less than 50	CEO and Exco	Explore and clarify the value proposition of this non-profit organization to its members

LITERATURE REVIEW

Transorganizational systems (Cummings, 1984), trust (Mayer et al., 1995), and action learning (Raelin & Coghlan, 2006) can be viewed and analyzed as processes or cycles operating at different levels of analysis. We briefly describe these three perspectives beginning with TSs and collaborative systems, moving to perspectives on trust, and the philosophy of action learning that provided the basis for this study.

Transorganizational system (TS)

Cummings (1984), Ainsworth & Feyerherm (2016), and Kożuch & Sienkiewiczmałyjurek (2016) view transorganizational systems (TSs) as collections of organizations working interdependently on a task or objective which is too large in scope or complexity for a single organization to accomplish. These scholars differ on whether the organizations are working together tacitly or under an agreement and whether the organizations in a TS are working indefinitely or for an agreed period of time. That is, TSs or collaborations can emerge and exist unintentionally, but important shifts happen when the collaboration becomes intentional (Huxham & Vangen, 2005).

Intentional collaborations are expected to follow a life cycle of emergence, growth, and maturation (Ainsworth & Feyerherm, 2016; Cummings, 1984; Schilke & Cook, 2013). Cummings and Worley (2019) identified four stages for transforming an unintentional TS into a deliberate and intentional collaboration. The identification stage involves understanding the range of potential member organizations and the relationships among them. During the convention stage, selected network members are brought together to assess whether formalizing the network is desirable and feasible. The organization stage is characterized by the assembly of design components for task performance. Design components associated with these collaborative systems include a stated purpose, goals that are shared or at least compatible among the TS members, a governance structure, and a measurement and information system (Ainsworth & Feyerherm, 2016). A leadership group or sub-set of organizational members – often referred to as a referent organization (Trist, 1983) – can be created to make decisions on behalf of the participating organizations. Ainsworth and Feyerherm (2016) list trust and a negotiated order as important outcomes of design choices leading to TS success. A negotiated order (Nathan & Mitroff, 1991) involves agreements about past interactions and contracting around future ones. In the final phase, the network assesses and evaluates performance to enable feedback and operational adjustments. Schilke and Cook (2013) propose a similar process model of initiation, negotiation, formation, and operation. Initiation and negotiation map onto the identification and convention phases while formation and operation processes map to the organizing stage. Both models include a feedback loop representing an evaluation process and support the idea that TS development can be a cyclical process. The current study uses Schilke and Cook's (2013) labels on driving intentional collaboration.

Trust and Transorganizational Systems

Kożuch and Sienkiewiczmałyjurek (2016) emphasize that *trust is the lubricant* that makes cooperation between TS actors possible, and higher levels of trust are believed to lead to more effective collaboration. Trust is widely agreed to represent "the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party" (Mayer et al., 1995, p. 712). Consistent with Mayer's definition, Doney and Cannon (1997) extend the trust definition to the interorganizational level by emphasizing the willingness to rely on another party where such action makes one vulnerable to the other party. While listing trust as an ingredient of TS, these models do not speak to how it is developed.

Moving closer to trust formation, Liu et al. (2018) note that the Social Exchange Theory offers a socialized, context-oriented, and path-dependent framework for understanding interorganizational trust. Social exchange theory proposes that individuals and organizations form expectations based on what one party offers another and what might be offered by that other party in return (Cropanzano, et al., 2017; Cropanzano & Mitchell, 2005). For example, each party interprets the other's behavior depending on whether or not the behavior complies with the reciprocity norm (Gouldner, 1960). An exchange of resources – economic and financial or socio-emotional (Cropanzano & Mitchell, 2005) – presumes that both parties expect that such exchanges will be ongoing in the relationship and contribute to trust over time (Rousseau et al., 2018; Rousseau et al., 1998). Blau (1964) emphasizes that social exchange relationships require individuals to trust one another *ex-ante* because of the mutual dependency or expectations that are created by the exchange relationship.

At both the interpersonal and interorganizational levels, trust development has received considerable attention from multiple perspectives, including swift trust (Meyerson et al., 1996), trust development between individuals and organizations (Schilke & Cook, 2013), and trust building cycles (Vangen & Huxham, 2003). The swift trust framework is relevant to this study because it suggests that trust can develop quickly in temporary settings by managing vulnerability, risk, uncertainty, and expectations (Meyerson et al., 1996; Blomqvist & Cook, 2018). The process is somewhat cyclical and reciprocal in nature, applied in temporary systems,

and focuses on a single, interpersonal level of analysis. The cross-level trust development framework is relevant because it describes how trust forms between individuals and organizations through assessments of trustworthiness, reputation, and vulnerability (Schilke & Cook, 2013). Schilke and Cook (2013) see the process of trust building as linear, since trust develops in sync with their phases of TS development and crosses between individual and organizational levels. Finally, a cyclical view of trust building is relevant because it involves a process of learning. Levels of trust increase with loops of activity that account for expectations, risk, and vulnerability as well as reinforcement (Vangen & Huxham, 2003). The notion of a trust cycle suggests that levels of trust grow over time as parties take small risks, get feedback on the results, and, if satisfactory, take bigger risks. Trust cycles can recur over the life of a TS.

These processes are remarkably similar in their view of the conditions and activities that contribute to trust development. Trust between two or more individuals from different organizations or between organizations is facilitated or constrained as functions of 1) uncertainty, risk, and vulnerability, 2) expectation formation, and 3) trustworthiness and reputation. *Uncertainty, risk, and vulnerability* are the well-spring of trust (Rousseau et al., 1998; Lane and Bachmann, 1998; Gulati, 1998; Das & Teng, 1998). A cyclical learning-oriented model (Vangen & Huxham, 2003) says that trust development builds on small steps where each party "tests the waters" through small risks. "When risk and uncertainty levels are high, a strategy involving incremental increases in resource commitments may indeed be the preferred strategy – gradually developing trust" (Vangen & Huxham, 2010, p. 170).

Other models see risk and trust in a reciprocal relationship. Under uncertainty, the more one party is willing to be vulnerable and take a risk, the more opportunity there is for trust to develop. In TSs, this risk/trust relationship often plays out first between individual boundary spanners from the different organizations but eventually extends to trust between organizations (Schilke & Cook, 2013).

Ford, Piccolo, and Ford (2017) found that feelings of risk and vulnerability can be lowered by increasing psychological safety (Edmondson, 1999), or a shared belief among members that group interactions support, encourage, and value open, spontaneous communication among team members. Frazier et al. (2017, p. 114) emphasize that psychological safety is also "a key factor in

facilitating the process of learning." It is not at all clear whether psychological safety precedes risk taking or is the result.

Uncertainty and vulnerability in a virtual context represent a special case of inter-organizational trust. Digital technologies, decision making speed, globalization and cross-cultural networks, and the volatility, uncertainty, complexity, and ambiguity (VUCA) of organizational environments increase the frequency of virtual relationships and work (Nowacka & Rzemieniak, 2021). In the absence of face-to-face communication, non-verbal cues are not available to assess the likely benefits of risk and vulnerability (Gibson & Cohen, 2003).

Whereas risk and vulnerability speak to the experience of individual TS members, *expectation forming* is more relational (Rousseau et al., 1998). Expectations can be based on prior relationships or history (Schilke & Cook, 2013; Das & Teng, 1998) or an assessment of the likelihood of having a desirable action performed by the other party in the future (Das & Teng, 1998; Lane & Bachmann, 1998). Past experiences can lower concerns about risk and vulnerability and increase the credibility of partner commitments. Future based expectations can often be codified in contracts and agreements until trust is established (Gulati, 1998).

The final contributor to trust development -- *trustworthiness and reputation* -- reflects assessments by one party or the other. These assessments can contribute to the foundation of expectations. Alarcon et al. (2018) operationalized trustworthiness in terms of ability, benevolence, and integrity. Ability refers to a certain set of skills possessed by individuals or organizations that enables them to perform a function in a specific context (Lleó de Nalda et al., 2016; Mayer et al., 1995). Benevolence is, "the extent to which a trustee is believed to want to do good to the trustor, aside from an egocentric profit motive" (Mayer et al., 1995, p. 719), whereas integrity denotes the trustor believing that the trustee conforms to a certain set of principles and values that are acceptable to the trustor.

An organization's institutional categories, such as age, industry, brand, and geographic location, can also provide a basis for trustworthiness assessment (Schilke & Cook, 2013). Research on swift trust suggests that, especially when relevant information is scarce, institutional categories strongly affect trust beliefs. If the trustor considers the institutional category to which the trustee belongs to indicate trustworthiness, the trustor will perceive the trustee to be trustworthy as well.

Consistent with our adoption of a cyclical action learning framework in a TS setting for this study, we rely on Vangen and Huxham's (2003) model of cyclical trust development. In newly forming TSs, trust is frequently weak, there is little motivation to take initial risks, and assessments of trustworthiness may be fraught with uncertainty. Vangen and Huxham (2003) suggest that TS members set initially low expectations, work together, reinforce the effort and the outcomes, and agree that higher expectations are possible. Expectation formation becomes a central task that is facilitated by a series of small agreements and a "test and learn" philosophy. At some level, even initiating the trust-building loop requires the ability to form expectations about the future outcomes of the collaboration and a willingness to take risks. Success at initial stages of joint action build a foundation for more risky and vulnerable behaviors as expectations are formed and fulfilled.

TS Development and Action Learning

Shani and Coghlan (2019) suggest that action research is a family of approaches, including action learning, that integrates theory building and practice. Action research attempts to build theory by reflecting on improvements in real situations through cycles of data generation, sense-making, intervention, and evaluation. Learners participate in these efforts as subjects and objects with the explicit intention of bringing about change in a spirit of collaboration and co-inquiry (Coghlan & Shani, 2014). Thus, all versions of action research are viewed as cycles of activity.

To differentiate between action research and action learning, Raelin and Coghlan (2006) note that action learning's cycles of planning, acting, reflecting, and learning are a pedagogical process that involve learners working and reflecting together on real-time problems occurring in their own work setting. Revans (1982) originally emphasized that with action learning, the learning is embedded in the task and therefore formal instruction is not adequate. Learning involves voluntary doing, spurred by urgent problems, and measured by the results of the action.

In the context of TS development, Coughlan and Coghlan (2011) and Coghlan and Coughlan (2015) argue that adopting an action learning approach enables interorganizational networks to develop and learn. Coghlan and Coughlan (2015) note that cyclical–sequential phases may be identified that capture the movements of collaboration through planning and action to evaluation. These cyclical-sequential phases suggest that action learning processes can address both a broad

arc of change – TS development – as well as smaller cycles of learning within a stage of TS development. Similarly, Yström et al. (2019) emphasize that action learning enables interorganizational collaboration and at the same time allows for researching that process.

In summary, the literature shows that by working on real, relevant, and shared problems (Raelin, 1997), where everyone is equally invited to participate, under egalitarian norms (Coghlan & Coughlan, 2015), and through a commitment to questioning and reflective processes, TSs can move from tacit and unintentional to intentional, and from seeing the TS as a potential opportunity to it being a learning and operating system generating real benefits.

Linking Action Learning and Trust Building Cycles

The literature on action learning and trust suggest three links: (1) the vulnerability and risk-taking associated with the uncertainty of finding solutions and producing outcomes, (2) the spirit of equality, collaboration, and co-creation, and (3) the cyclical nature of both processes.

First, Coghlan and Rigg (2012) note that action learning involves vulnerability and risk-taking as participants in a network admit to the limits of their knowledge. "The antidote to this vulnerability and risk-taking is the atmosphere of trust that needs to be created in the social setting where the learning takes place in order that individuals may feel psychologically safe to unlearn and learn" (p. 63). As before, cause and consequence are unclear. The broad steps of action learning – planning, acting, reflecting, and learning – may involve behaviors associated with trust building. For example, during the planning phase, identifying problems, collecting information, and determining a course of action can require admitting that a problem exists. Proposing a course of action risks rejection and sets expectations, and the success of the planning process often depends on the credibility of the team members. Acting and reflecting also admit trust categories of risk taking and vulnerability. Reflecting may be the most demanding of all the steps. Making sense of an outcome means putting action in a context, being open and honest about whether some activity was valuable (or not) and describing the implications for practice. Interpretations are a risky proposition. What is clear is that for action learning to be effective, trust needs to be built, and the current study therefore points to the reciprocal relationship between action learning principles and their learning philosophy and the building of trust within the context of the development of the TS.

Second, trust development and action learning are grounded in an ethic of equality and collaboration. Coghlan and Shani (2014) emphasize that action learning is an emergent inquiry process of an unfolding story among multiple stakeholders. Thus, scholars point to the assumptions underlying that process. They note that participants are more likely to collaborate when system members and researchers have equal influence and a common language. Under task uncertainty, this equality can contribute to higher levels of risk taking.

Finally, Lewin's (1944) original work points to the cyclical processes of diagnosing a change situation, planning, gathering data, taking action, and then fact-finding about the results of that action, and planning to take further action. Coghlan and Shani (2013) advise more recently that action researchers need to show how they engaged in cycles of action and reflection in collaboration with others and how they accessed multiple data sources to provide contradictory and confirming interpretations. In the discussion of trust above, the cyclical nature has been described and could be linked with the cyclical processes of action learning.

RESEARCH METHODS AND DESIGN

This study researched how an action learning approach to TS development and operation contributed to the development of trust. This section outlines the research design, data collection methods and variables measured, and the analysis process.

Research Design

We position this study – in the broadest sense – as an action learning process (Bradbury-Huang, 2010; Raelin & Coghlan, 2006). "[Action learning] is principally committed …to learning for those directly involved and is not particularly interested in whether such learning goes beyond the specific group or organization…." (Rigg & Coghlan, 2016, p. 202). As Universities A and B began to form, develop, and operate the TS in March 2020, it became clear that supporting an action learning process was, in fact, the right thing to do. Initiating and forming the TS so that an educational practicum and a set of applied consulting projects could be delivered required learning and changing; action learning seemed well suited to that objective. Following the practicum, we saw important potential theoretical contributions from the work and that led us to add a more traditional research component to the action learning design.

In the main, then, the methods described here adhere to principles of action-oriented knowing including research that is constructed <u>with</u> participants rather than on or for them (Coghlan & Shani, 2014). It focuses on the inquiry process as well as the implementation process. Coghlan and Shani (2014) suggest that (a) clarifying the context, (b) describing the quality of the relationships and (c) the quality of the process itself, and (d) presenting the practical outcomes of value to the business are key standards for evaluating action-oriented knowledge creation. These standards were important touchstones for the research reported here. For example, the research setting for the educational practicum provided important background on the research context.

The primary mechanism used to promote change and surface that practical knowledge was reflecting, an integral step in the action learning cycle of experience (Revans, 1982) as represented by planning, acting, reflecting, and learning. Planning involves collecting information, identifying a challenge or problem, and determining a course of action. Acting describes the behaviors and decisions that implement the plan. Reflecting involves describing what happened and making sense of the process while learning extracts conclusions, principles, and insights about what and why things happened. Raelin (2006, p. 152) suggests, "Learning arises not just from representations of conceptual material, but from questioning among fellow learners as they tackle unfamiliar problems." He emphasized the reflection on practice under unfamiliar or stretching conditions. The COVID-19 pandemic and the urgency and uncertainty associated with forming the TS between the two universities on different continents certainly created these unfamiliar and stretching conditions.

Action learning took place at three levels. At the highest level, an action learning approach guided overall TS development. Planning, acting, reflecting, and learning solved the problems of designing and delivering the practicum and meeting the educational objectives in a new location with new partners. Following Schilke and Cook (2013), TS development occurred across three phases: initiation and negotiation (Phase 1), TS formation (Phase 2), and TS operation (including evaluation) (Phase 3) (see Table 3 and described below).

Table 3 – *Phases, timing, data collection methods, and variables contributing to trust*

Phase/ Timing		Label	Data Collection Methods	Data Collected	Actors Involved
1 Oct 2018 – Feb 2020	Action Learning	Initiation & Negotiation	• Archival document reviews	• Shared models, vocabulary • Shared learning experiences • Shared consulting experiences • Conversation topics between Univ. A & B faculty leads	• Univ. A student cohort • Univ. A faculty • Univ. A & B faculty leads
2 March 2020 – April 2020		TS formation	• Archival documents • Interviews • Survey • Observations	• Events, decisions, conversation topics, meeting agendas • Attitudes and experiences	• Univ. A & B faculty leads • Univ. A Steering committee • South African client representatives

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April 2020– June 2020
		TS operation (including evaluation)	• Survey
			• Reflective sessions
			• For each project:
			  o Archival documents
			  o Observation logs
			  o Interviews
				• Attitudes/reactions from participants & non-participants re: results and outcomes
				• Decisions
				• Agendas & processes
				• Reflections
					• Univ. A student project teams
					• Univ. B facilitators
					• Univ. A Steering committee

4 Sept 2021	Research	Post-practicum research	• Interviews • Focus group	• Observations, reflections, and attributions • Inferences re: trust	• Univ. A Steering committee • Univ. A and B faculty • Univ. A Program director

Action learning activities also occurred at a meso level; each phase of TS development represented its own set of problems. For example, TS formation in Phase 2 required planning, action, reflection, and learning to establish the infrastructure of a working system. Action learning was used to address the more specific problems that had to be solved within each phase of TS development – problems that were related to finding solutions so that the practicum could proceed and meeting the needs of the client organizations. Finally, no phase was a monolithic, linear sequence of plan, act, reflect, and learn. Mini action learning cycles were needed to address problems that arose in the course of the phase itself.

Following the practicum, and based on the evaluation of the TS's performance, faculty members and cohort participants recognized the opportunity to explore the role of trust. A second post-practicum research process was formed around the research question and constituted Phase 4.

Phase 1 – Initiation and Negotiation – was captured by the experience of University A's cohort and program faculty as described in the Research Setting. This phase technically began when the cohort was formed in October 2018 but found its most relevant expression when the faculty members at University A and B agreed, in February 2020, to collaborate in delivering the final practicum.

Phase 2 – TS Formation - began with the two universities formalizing the relationship and the University B faculty lead mobilizing her South African network of potential client organizations and support resources. Cross-university collaboration and TS formation also occurred when the University A faculty lead worked with potential client organizations to frame a compelling consulting project. Phase 2 ended when the student project teams made their initial contact with their client organizations.

The TS formation phase represents a meso-level action learning cycle. It also framed two-to-three mini cycles of planning, action, reflection, and learning. For example, each potential client contact activated by the University B faculty lead's network kicked off its own action learning cycle aimed at bringing the client on board. Moreover, during the early part of the TS's formation, various decisions triggered action learning activities in the University A student cohort, including webinars, surveys of COVID-19 impacts and consulting experience, and preparation for the consulting engagements.

Phase 3 – TS Operation – was dominated by the execution and evaluation of the client consulting projects. Each engagement represented an action learning project that spanned the 3-4 weeks before the practicum and then four days dedicated solely to project execution. Each project can be described by a series of planning, acting, reflecting, and learning cycles. Following the consulting engagements and the practicum, the University A student cohort engaged in a series of reflective sessions to integrate and evaluate the experience.

Although described chronologically and linearly, the process was clearly one of cyclical activity within a phase, allowing for changes within subsequent phases and cycles as new learnings occurred. Such cycles and phases are consistent with transorganizational development (Cummings & Worley, 2019) and participatory aspects of action learning/research (Stringer, 2014). This was particularly the case with the student steering committee members who held a researcher role throughout the project and were still members of the cohort.

Phase 4 – Research – data collection took place one-year later to explore the practicum's outcomes and to retrospectively analyze the role of trust in leading to these results.

Data Collection Methods and Measures

Primary data collection occurred in two rounds. The first round occurred between March-June 2020 and the second round occurred in September 2021. Data collection methods for both rounds included reviews of archival records, observations and field notes, interviews, and surveys over the four phases (the three phases of TS development and a fourth post-practicum research phase) (Table 3). Although properly classified as mixed methods research by virtue of the use of surveys on several occasions, the quantitative data was used mostly in support of the qualitative descriptions of the process. These data collection methods were informed by Nielsen & Abildgaard (2013) and Nemiro, et al. (2008) who encouraged a focus on the way relationships (in this case between institutions, students, and client organizations) and project teams were formed, how decisions were made, how activities were implemented, and the impact of these activities to best evaluate the TS and the practicum. This is consistent with the standards proposed by Coghlan & Shani (2014).

- Archival data, in the form of syllabi, emails, and agendas, provided useful data on history; curriculum topics, frameworks, and experiences; meeting topics; decisions; and behaviors.
- Interviews were conducted by members of the University A steering committee and University B facilitators. Interviews gathered data on attitudes and experiences of the faculty and of the students, descriptions and assessments of change, and descriptions of decisions and activities of different groups. Facilitators conducted interviews before, during, and after the consulting projects to gain data on the attitudes and experiences of

the client organization's members. Interview questions centered around the behavior of the project team that was helpful or constraining, internal opinions about the project, and assessments of project performance.

- Surveys of the student cohort were administered prior to client engagement (beginning of Phase 2) and as part of a class evaluation. This generated data about the attitudes of students, their experience with virtual and virtual technologies (e.g., Zoom, MS Teams, WhatsApp, etc.), and their descriptions and assessments of the practicum experience.

- Observations and field notes were an important data source. Student steering committee members and alumni advisors kept a running log of activities, behaviors, and decisions documenting project team activities as well as client/project team interactions. [An example of the template is available upon request.] These observations and field notes yielded information about meeting topics, activities, and discussions, interventions and processes used, behaviors, and weekly/daily evaluation/reflection meetings within the project team.

A second round of data collection occurred in September 2021 (Phase 4). Individual interviews were conducted by the authors with the University A program director and University A and University B faculty leads. The authors also facilitated a focus group with three out of the six University A alumni advisors. Given that this round of data collection was in service of the broader research question about the relationship between TS development, action learning, and trust formation, questions for this set of data collection centered around observations of TS formation and operation, key events and activities that contributed to consulting project success, and client or project team behaviors that contribute to the development of trust. For example, we asked, "How did you experience collaboration and trust over the different phases of TS development?"

Analysis Process

The analysis process also consisted of two rounds. Utilizing both rounds of data collection, the first round of analysis consisted of creating a chronological list and record of the activities, decisions, conversations, and other events that constituted different action learning cycles within each phase. Especially in Phases 2 and 3, many of these cycles were happening in parallel.

Survey data was used to verify perspectives at a point in time and to support the development of a process narrative. Within phases, the researchers reviewed the qualitative data by looking across collection methods to triangulate on decisions, events, and topics discussed. Multiple readings of the observational notes also identified consistent themes and chronological relationships between and among various stakeholders. As part of their steering committee role, the student representatives coded key events and decisions in assessing 1) the effectiveness of the consulting projects and 2) the practicum overall.

The themes derived during the first round of analysis were guided by concepts and categories defined in the literature review, including phases of TS development and action learning steps that contributed to project success. The five authors – together and separately – reviewed the data over several months to arrive at a consensus regarding the categorization of events.

A second round of analysis used the event history and learning cycle results as a context for identifying behaviors within an action learning cycle that contributed to trust formation. Data from both rounds of data collection were relied on. Post-practicum interviews focused on behaviors and events that contributed to the research question. Data from the first round of data collection was used again to understand its contribution to trust formation rather than the development of actionable and practical knowledge.

The key variables emerging from the second round of analysis was the extent to which behaviors contributed to trust building (Vangen & Huxham, 2003) and the extent to which those behaviors were also connected to the action learning process. Trust was not measured directly. Rather, using the *a priori* categories of variables contributing to trust formation identified in the literature review, trust was inferred whenever interviews, records, or observations suggested the presence of behaviors consistent with 1) uncertainty, risk, and vulnerability, 2) expectation formation, and 3) trustworthiness and reputation. Specific behaviors or choices were attached to one or more (if warranted) of the categories defined by Vangen & Huxham (2003), Schilke and Cook (2013), and Meyerson et al. (1996). For example, uncertainty, risk, and vulnerability were indicated when 1) one party agreed to perform some activity that might have left them physically, emotionally, or intellectually defenseless or helpless or 2) one party behaved or spoke in a way that hoped or invited the other party to reciprocate. Expectation formation was indicated

when one party made a promise to perform a certain activity at a certain level, claimed to be able to perform some valued activity, or successfully exchanged resources or completed a task. Trustworthiness and reputation were indicated when one party assessed the other party's ability to perform, referenced their credibility, referenced past behavior as a reason to move forward, or made an assessment of the other party's ability to deliver on a commitment. As before, the five authors – together and separately – reviewed the data over several months to arrive at a consensus regarding the categorization of events.

Conclusions regarding the contribution of action learning to trust formation were based on the presence of these connections during each phase.

FINDINGS

This section presents a process narrative describing the key activities and events associated with the three phases of the action learning/TS development process and then, as part of the fourth phase, connects behaviors that occurred during the TS development and action learning to the trust categories.

Process Narrative

PHASE 1 – Initiation and Negotiation

As described in the Research Setting, the shared experiences, education, and curriculum of University A's OD program served as a foundation for planning the final practicum. Circumstances associated with the COVID-19 pandemic forced the program to consider an alternative venue. The first meso action learning cycle thus coincided with the initiation and negotiation phase of TS development. Here, the acting process consisted of the University A faculty lead reaching out to a colleague at University B with an OD background and was followed by some reflection between them. The reflecting question was, "what do you think about this idea?" and led to a set of learnings that basically concluded, "we can do this."

The presence of an existing relationship between the two faculty leads of each institution created the opportunity to pivot in a time of crisis and act with agility to form, develop, and operate a temporary TS. Part of that agility was a function of a shared vocabulary and point of view. A shared disciplinary background in OD helped the two faculty members accelerate the successful

execution of this phase; it was clear to University B's faculty lead what University A was asking for. The partner university in South Africa possessed the necessary conditions to meet the objective of the practicum and the decision was facilitated by a prior relationship. The colleague at University B then became the second faculty lead for the practicum and a member of the steering committee.

PHASE 2 – TS Formation

The agreement to work together to deliver the final practicum marked the end of Phase 1 and the beginning of Phase 2. The faculty leads worked together to build an infrastructure for the practicum. It extended TS membership to the South African client organizations. Broadly, the Phase 2 action learning cycle involved planning for the practicum, acting to build out the TS network, reflecting on stakeholders' willingness and ability to commit to TS operation, and deciding whether to put the system into action.

First, the relationship between University A and B needed to be formalized not just in terms of financial considerations – given University B's work on behalf of the TS – but in terms of the practicum's requirements. Second, the planning process involved University A's faculty lead explaining the objectives of the practicum, the number of clients needed, the types of client projects the program was hoping for, and the arrangement of hotels, meals, and transportation. University B, for example, suggested the use of meeting rooms on campus, local hotels, and guest speakers to support the practicum. This happened in parallel to the University A student cohort studying networks and agility as prescribed by their curriculum.

In due course, University B's faculty lead reached out to her network to recruit clients. In this acting process, she contacted other faculty members, alumni, doctoral students, and business connections. When initial interest was expressed, she explained the situation and the requirements. If after first contact, the interest remained high, she connected the organization to University A's faculty lead and an initial meeting was set up over a virtual platform (e.g., Zoom, MS Teams). During the initial meeting, additional information was shared, including descriptions of University A's program and objectives, background information on the client organization, potential topics for consultation, commitments for time, people, and support, and the coordination of getting the groups together in South Africa.

In the end, seven or eight mini-action learning cycles (not all contacts were willing or able to commit to a project) occurred; each mini-cycle contributed to learning about how best to pitch the process to the next potential client. All client organizations who agreed to participate were secured because of their previous alliances and relationships with University B – a sign of trust.

By acting within her network, the University B faculty lead capitalized on existing intra-University and external organizational relationships to secure client organizations. Based on the client sign-ups, the University B faculty lead believed clients were willing to join the process without much time to build relationships with University A and the student project teams. She observed that clients were willing to engage with University A's program because there was assurance that these students were more experienced than junior MBA students. Both faculty members made themselves available to quickly answer any University B or client questions by email or virtual meetings.

As these relationships were developing, the COVID-19 pandemic expanded and triggered another mini action learning cycle that involved the two faculty leads but expanded to the whole student cohort. Travel restrictions announced in various parts of the world, including the US and South Africa, made it apparent that a physical, face-to-face session could not happen. The University A faculty lead prepared for a call with the University B faculty lead to say the session had to be canceled. During the call, the University B faculty lead asked whether the practicum could happen virtually. A planning discussion explored the coordination of such a session, and the University A program director and Steering Committee approved the idea.

Out of the decision to proceed with a virtual practicum came the problem of supporting the clients in-person. The University B faculty lead proposed local "facilitators" to function as liaisons between University B and the South African clients as well as an in-person point of contact for the student project teams. Adding a facilitator to the consulting project was a new role for the TS. University A and B faculty leads discussed the pros and cons of such an arrangement, especially the possibility that the facilitators could become the de facto consultant and diffuse the intensity and responsibility of the student project team. In the end, the facilitators became an important source of data gathering for the action learning process. When the clients

and their project descriptions were clarified, University B's faculty lead paired facilitators with client organizations, often based on a previous relationship.

The decision to turn the practicum into a virtual session was the impetus for another mini action learning cycle associated with planning the virtual projects. To understand the challenges of doing a virtual session from the students' point of view, a survey was created by the steering committee and distributed in April 2020. The survey focused on understanding personal and professional COVID-19 impacts, students' thoughts on upcoming work with South African clients, and student skill level with virtual consulting elements. While the students were accustomed to working in new team configurations, several conditions contributed to a greater than typical level of uncertainty. First, all students felt moderate to severe levels of COVID-19 impact on their ability to prepare for the consulting engagement as well as impacts at the living/family, work, and personal health levels. Second, several students had concerns about going virtual and having a short amount of time available to plan and deliver on the projects. Seventy percent were either extremely confident or somewhat confident while 30 percent were neither confident nor non-confident. In contrast, when rating their confidence to consult in a face-to-face environment, 100 percent were extremely or somewhat confident.

Shortly after the student survey went out, the University B facilitators interviewed members of the client organizations as part of their own transition from in-person to virtual support. Two-thirds of the clients expressed very little experience with virtual consulting and two clients noted that their businesses were new to remote work. One client shared a concern about internet connectivity, and another client acknowledged the greater impacts of the nationwide lockdown. When asked for their thoughts on why they were willing to work with students from the University A program, clients stated such reasons as previous relationships with University B contacts, interest in newer academic models and fresh perspectives, an opportunity to give back, and curiosity about what a group could do in this environment. This information was shared with the student project teams as they began engaging with the clients. Upon reflection, the two faculty leads believed that the conditions had been set to move forward with the projects.

PHASE 3 - TS Operation (and Evaluation)

Phase 3 began with the introduction of the student project teams to the client organizations, and each project team-client pair had to quickly build new, productive, and virtual relationships. Thus, the Phase 3 meso action learning cycle is best viewed as six relatively independent action learning projects with several action learning cycles in each one. However, at the TS level, the faculty leads continued working together to open communication lines between the student project teams and client organizations by facilitating individual meetings with each client-project team combination. The faculty leads also maintained and invested in the TS by addressing conflicts and performance issues that arose amongst the groups.

The data collection logs for the student project teams revealed themes around relationships, roles, and responsibilities in executing the projects. The project teams used virtual meetings to focus on internal team building and plan the consulting engagements. The team building included role clarification discussions about leadership, documentation, and division of responsibilities with client work (e.g., client interviews). The internal focus of the project teams in the beginning allowed the students to research the client organizations and set expectations with each other before engaging directly with clients.

The first mini-action-learning cycle from each consulting project involved two to five virtual meetings between the student project teams and client organizations during the three weeks prior to the practicum's start. The two biggest logistical challenges to the project kickoffs were 1) navigating communication across multiple time zones and virtual conferencing technologies (e.g., Microsoft Teams or Zoom) and 2) and working through the occasional planned power outages in South Africa, which sometimes impacted project team connectivity with the clients. The purpose of these initial actions was to co-create an agenda for the work and agree on deliverables for the project.

Facilitator interviews during this mini action learning cycle asked about the first meeting between the client and student project teams. All client respondents used positive words to describe the student project teams. The InsureCo Client facilitator summed up the client's thoughts this way, "*The [client] feels like there are synergies with the team and they have been very respectful of time and seem organized. They also seem approachable; it doesn't feel sterile*

and 'coldly consulting' to [them]." This same client noted, *"Developing a rapport initially is critical. [Using] video I think was important on that first call and spending some time around chemistry goes a long way. And maybe because it was virtual, we made more of an effort overall."* Another client noted: ***"I am constantly informed of what is happening and what to expect. Everyone keeps to the time that is agreed upon. I am given enough time to prepare myself. I am told upfront of the meeting times to prepare myself. The University A team is flexible with time. They make sure times are suitable for both parties (despite the time zone difference). The team is considerate"*** (AgencyCo Client).

Facilitators then asked about any client concerns at this point in the consulting process. One client did not disclose any concerns. Two clients had concerns about whether their company information would be treated confidentially and they had to be assured of confidentiality. Additional concerns that surfaced were about student abilities to pick up personal nuances and biases in the virtual environment and student expectations of the client. During this time, the South African client organizations were also moving from in-person office work to remote work only within a short timeframe.

A second set of mini-action-learning cycles occurred during a three-day period in May 2020 when the client organizations and student project teams met daily for 2-4 hours to execute their respective consulting plans, activities, processes, and interventions. Student project teams were mostly located across North America and divided their day into thirds. Due to the time zone differences, the morning third was spent with the client organizations in South Africa (acting, reflecting, and learning). The middle third involved debriefing and reflecting on the client call, drawing conclusions, and planning for the next day. The final third was spent on a whole cohort call with University A faculty and alumni advisors to share experiences. Thus, each project went through four to six action learning cycles of planning, acting, reflecting, and learning as well as three cycles of group learning.

The overall effectiveness of the client projects in Phase 3 was measured by a series of evaluation surveys, meetings, and interviews in the days following the May 2020 interventions.

Students and alumni advisors from the steering committee conducted debrief meetings with their assigned project teams on the practicum's final day. When asked what helped with facilitating

the delivery of a quality project, all six teams noted that their previous learnings in the OD program and experiences in previous practicums integrated into this project. Some specific frameworks mentioned were complexity theory, agility, appreciative inquiry, dialogic interventions, process consultation, and consulting processes. Two teams specifically noted previous experiences with virtual collaborative tools.

When asked which contextual issues made delivering the project most difficult, all six teams mentioned navigating time zones with the client. Three teams offered that working remotely during the virtual practicum was difficult while being at home with others. One student summed it up this way, *"Competing priorities, juggling schedules, different levels of commitment, managing expectations with work. It's a lot"* (Student #4). Two teams expressed uncertainty about their team's performance due to missing cues that would have been more visible in face-to-face settings.

An evaluation student survey supported the interview findings. It suggested that COVID-19 impacts were present but moderate. The prior "self-as-instrument" work, cross-cultural skill development, and OD tools all helped to accelerate the process and learning. The survey results also showed that the projects were broad and complex especially when contracts were unclear, that client relationships were transparent, and that time zones and time were the biggest barriers.

Finally, when facilitators asked clients what worked well, two clients shared that the students were professional, well prepared, and organized. Another client noticed the students had a strong command of technology. One client offered that the open communication and timing by the team fit well with the client's needs at that time. When the clients were asked to provide feedback to the project teams, one client noted that managing client expectations better would have been helpful, specifically the student project team offering a more defined schedule for the intensive days. One client expressed surprise that the lack of business experience in South Africa was not an issue. Another client found a global business commonality with student experiences in their own professions. Lastly, a client gave structural suggestions, such as streamlining the number of student presenters, offering more methods for interviews, and having more time with the student project teams.

The final question to clients asked for their reflections on the consulting project:

- InsureCo: *"It was a surprisingly rewarding experience, we had access to skill sets and perspectives that we would not have had access to. It turned out much better than I or others would have expected…the final recommendations were very practical and almost so obvious (but we hadn't seen it before). I am excited to get some traction around some of these ideas."*
- MiningCo: *"The interaction was very good; they were prepared and it was clear there was a formula and structure to what they were doing. I was apprehensive to use the technology but worked very well. I was flabbergasted by the outcome. What they put together for <us> was an amazing framework that we can actually use."*
- FinanceCo: "*What came out of the session is putting up a mirror to the guys to say if you know this is what needs to be done, why are you not doing it. It was a good confirmation for me who have not been in the business for long that my deductions are sound. And what I suspected to be the problem is indeed the problem. It worked well for me"*.
- EngineeringCo: "*It was easier than expected...Businesses across the two countries are experiencing the same challenges currently, which assisted in feeling understood.*"

Connecting Action Learning Behaviors to Trust Categories

The practicum activities described above provided an event history of action learning associated with TS development, the meso action learning associated with each phase, and several mini action learning cycles within those phases. In this section, as part of phase 4, we describe how the behaviors in these action learning cycles reflected and paralleled various trust building cycles during TS development. The different behaviors in each action learning cycle were assigned to trust categories described in the literature review and methods sections (See Tables 4, 5, and 6). During each action learning cycle, a set of behaviors occurred and re-occurred to evolve and raise levels of trust. That is, each action learning cycle was also a cycle of trust building behaviors.

Trust Building during Initiation and Negotiation

Table 4 describes behaviors during the Phase 1 action learning cycle that contributed to trust. Prior relationships between the two faculty members (credibility and history), the University A and its OD program's reputation in South Africa, and a history of relationships among the students were essential elements that served as a foundation of trust.

Table 4: *Phase 1 Initiation and Negotiation Behaviors and Trust Categories (January-March 2020)*

Trust Categories	*University A and B Faculty Leads*	*University A Steering Committee*	*University A Student Cohort*
Uncertainty, risk, and vulnerability	● Reaching out to Univ. B faculty lead ● Sharing frequent updates to students via email	● Nominating themselves for SC membership ● Representing cohort	● Experiencing the program over the last for 18 months
Expectation formation	● Describing focus of course on TS and agility ● Promising quality consulting ● Promising good support	● Agreeing to serve on the committee & committing to standards of the role	● Agreeing to deliver high quality consulting
History and Reputation	● Authoring well known books and articles on OD and TS ● Univ. A has world-renowned OD program ● Emerging OD scholarship ● Prior relationship between Univ. A & B faculty leads	● Remaining current on work; being known as organized and able to work in complex situations	● Experiencing the trustworthiness of Univ. A in delivering the program for 18 months prior to the practicum

However, that foundation had to be extended for the practicum to work. Here, the University A faculty lead dealt with the uncertainty of having to pivot the session by taking the risk to reach out to his network and one colleague at University B reciprocated that risk by agreeing to collaborate. The University A faculty lead noted, "It was a big deal and a big relief to hear [her] say 'yes' to such an uncertain process." Second, both faculty leads engaged in vulnerable and expectation setting behaviors: University A's faculty lead promised experienced students to deliver high quality consulting and University B's faculty lead promised high quality support. Again, their history lent credibility to their promises.

Trust Building during TS Formation

Table 5 describes behaviors that contributed to trust formation during the TS formation action learning cycle and the different mini action learning cycles within the phase. For the TS and the practicum to be successful, it had to develop additional cross-group relationships, respond to the evolving challenges of COVID-19, and prepare for the consulting projects. Trust had to be transferred from the two faculty leads to the broader TS membership. During Phase 2, three different mini action learning cycles provided the opportunity to build trust between the two universities, among the faculty leads and the client organizations, and to a lesser extent between University A faculty and the students.

Trust between the faculty and the universities grew during Phase 2. The foundation of trust between the two faculty leads enabled them to plan and implement a complicated structure in a brief period of time. For example, through the arc of the temporary TS, there was no formal agreement between the Universities to collaborate. Besides an invoice to pay for University B expenses and fees for the facilitators, there was no memorandum of understanding or other document regarding the roles, responsibilities, or expectations of the faculty or students to perform. This represented an important commitment and risk on each university's part. The two faculty leads also kept the information exchanges flowing openly by quickly answering questions either by email or virtual meetings. In her September 2021 interview, the University B faculty lead credited the constant feedback loops within the practicum as important trust-building processes within the TS.

It was during this learning cycle that new stakeholders and relationships were built among University A, University B, and the South African clients. When the University B faculty lead reached out to her own professional network to recruit facilitators and clients, she linked her individual and organizational reputations to University A, a vulnerable and risky act that contributed to expanding trust in the TS. University A's reputation in the OD space helped in establishing client relationships.

Table 5: *Phase 2 TS Formation Behaviors and Trust Categories*

			March-April 2020		
Trust Categories	**Univ. A and B faculty leads**	**University A ecosystem**	**University B ecosystem**	**University A Steering Committee**	**University A Student Cohort**
Uncertainty, risk, and vulnerability	● Proceeding without a formal agreement b/w University A/B ● Proposing that session may have to cancel b/c of COVID-19 ● Suggesting a virtual session ● Proposing facilitator role to bring in-person representation	● Dealing with ongoing COVID-19 spread ● Worrying if Univ. B will be able to deliver clients ● Committing to face-to-face, then virtual	● Asking companies to participate in unknown relationship ● Dealing with ongoing COVID-19 spread ● Worrying if facilitators will maintain a neutral role client ● Coordinating across time zones and outside of work ● Meeting with student project teams before client engagement begins	● Participating in tasks challenged by overwhelmed business and health care systems ● Communicating constantly via Zoom, email, and WhatsApp	● Agreeing to virtual practicum (never done before) ● Translating consulting practices to virtual client projects ● Completing practicum challenges personal and professional capacity during an evolving COVID-19 pandemic ● Coordinating project teams across time zones and outside of work
Expectation formation	● Sharing Univ. B resources (meeting rooms, hotels, guest speakers) ● Meeting with each client to introduce students and projects	● Describing what's expected in project ● Visiting with potential clients	● Assuring clients that Univ. A can deliver ● Delivering multiple webinars on South African business & culture to Univ. A students	● Beginning to meet weekly to operationalize design ● Dividing up tasks individually and in pairs to get work completed	● Spreading out work over several weeks vs. 2-week intensive timeline ● Trying to learn in virtual space
History and Reputation	● Relying on reputations when interacting with the client teams		● Relying on its reputation within its ecosystem ● Having previous relationships with clients	● Having some experience with South Africa	● Having some experience with South Africa

During the client recruiting mini cycles, client conversations with the two faculty leads helped with setting expectations and building credibility between the Universities and clients. At a fundamental level, University B risked vulnerability in offering these projects to client contacts and trusting University A to deliver on their promises of prepared students and professional OD consultation. When the two faculty leads decided to move to the virtual model, the clients took the additional risk that the shift from in-person consulting work to virtual consulting with student project teams would be as productive. From the client's point of view, agreeing to work together represented a risk and vulnerability. University B and the clients were dealing with deep uncertainty as the COVID-19 pandemic spread quickly across South Africa in late April 2020.

The magnitude of this risk and vulnerability can be appreciated by understanding that the farther away any stakeholder was from the original core of the TS (University A or B faculty leads, steering committee), the less aware the stakeholder was of the behind-the-scenes coordination and levels of trust developed during earlier learning cycles. This placed more pressure on the University B-Client relationships. Moreover, the risk for the clients was even higher in terms of vulnerability and commitment to the time, effort, and exposure that the consulting projects required.

The rapidly changing COVID-19 context threatened the nascent relationship and triggered a mini action learning cycle even as the broader phase was proceeding. The faculty leads shared levels of vulnerability in this phase because the session could have been completely canceled due to the COVID-19 pandemic. University B faculty lead's creativity and willingness to pivot the whole practicum to a virtual session came as a surprise and a relief to University A's faculty lead. Moreover, the entire network – faculty, students, clients, and facilitators – shared in the risk of moving to a virtual session in spite of the uncertainties of remote work.

Another layer of trust that developed during this action learning cycle must be acknowledged between the University A faculty and the students. The cohort had been promised a session in China, promised a session in South Africa, and were now facing the prospect of a virtual-only session. The students outside of the steering committee relied on their representatives to communicate with them about changes happening while managing expectations. Regular

updates, transparent messaging, and quick responses to questions helped to develop accurate expectations within the student cohort.

Trust Building during TS Operations and Evaluation

Table 6 describes behaviors that contributed to trust formation during the action learning cycles associated with TS operation and the consulting projects and the immediate evaluation process. In Phase 3, the emphasis was on planning and executing the actual consulting projects or extending trust to the periphery members of the TS. During the action learning cycles that constituted each project, trust was facilitated by behaviors and activities that confirmed and extended the trust developed in Phase 2. While Phase 2 might be characterized as building trust capital, Phase 3 was about capturing the return on this invested capital.

At the TS level, the two faculty leads and the University A steering committee spent time reinforcing the early commitments to the TS and protecting the context of the consulting engagements. This included regular check-ins with project teams, alumni advisors, and facilitators. These interactions represented opportunities to continue trust building and evaluating but they also represented risks. One facilitator had not been performing well and then became infected with COVID-19. In another situation, a conflict between a facilitator and a student project team and a conflict within a client team required attention. These events threatened promised levels of support or consultation; responding productively maintained trust.

The six client engagements and the many trust cycles within each engagement represented the real work for which the TS had been designed. Utilizing mostly expectation setting, resource exchanges, and the willingness to take risks and be vulnerable, the clients and project teams developed positive and productive relationships and delivered on the consulting contract. To a certain extent, the equalizing nature of the COVID-19 pandemic contributed to this relationship (trust) building. For example, "*It was interesting to hear Student A's personal experiences at her own company, gained insight into (their home country), and realized that the challenges in different locations are broadly the same*" (EngineeringCo Client). There was no avoiding the virtual nature of these projects, so people had to adapt. The shared experiences and challenges of COVID-19 actually lowered expectations of performance and made it easier to build trust. It created a bit of slack in the development of relationships.

Table 6: *Phase 3 - TS Operation and Evaluation Behaviors and Trust Categories*

Trust Categories	Univ. A and B faculty	University A ecosystem	University B ecosystem	Univ. A Steering Committee	Univ. A Student Project Teams	South Africa Clients
	April-June 2020					
Uncertainty, risk, and vulnerability	● Problem solving around non-responsiveness or not meeting agreed upon deadlines and standards	● Meeting regularly with steering committee ● Checking in with alumni advisors on project team progress ● Addressing one project team not functioning well	● Checking in with facilitators every second day ● Checking in with clients to monitor progress ● Resolving conflict between a facilitator and team member	● Meeting regularly to exchange information ● Adding value by collecting useful information and designing the debriefing	● Creating opportunities to meet and know clients and teams ● Discerning and proposing methods to address client challenges	● Experiencing strong lockdown regulations and uncertainty ● Figuring out how much to share of the problem - Confidentiality was a concern for some
Expectation formation	● Exchanging expectations re: sticking to schedule and meetings lowered uncertainty	● Addressing a project team not functioning well	● Facilitating regular meetings with Univ. A faculty lead ● Problem solving with underperforming facilitator	● Agreeing to roles and collecting information required for assessment of projects and practicum	● Offering agendas and negotiating contracts with clients	● Agreeing to clear meeting timelines and committing to them ● Offering time, information, and willingness to co-create solutions
History and Reputation		● Upholding reputation to deliver quality program ● Meeting clients' expectations of original solution enhanced due to existing reputation of Univ. A	● Upholding reputation ● Providing regular updates to increasingly interested Univ. B executives	● Upholding personal reputations to prepare for final presentation and feeling performance pressure to achieve	● Feeling obligated to represent cohort and program reputation	● Expecting consulting quality due to Univ. A and B reputations ● Feeling obligated to create a good impression on the project teams ● Needing solutions due to COVID-19 pressure

The various stakeholders also had to risk disclosing problems, risk proposing solutions, and set expectations for future behaviors through open conversations and problem-solving orientations to build or maintain trust. These actions required vulnerability in the relationship. They used various methods to establish those relationships. For example, three project teams noted that the client's willingness to share personal stories, whether it was bringing a family member onto the screen or just opening up about their own professional struggles, was an important contributor. Below is a sampling of quotes from the interviews and data collection logs.

> *"I felt connected with the Primary Client and Point of Contact. Their willingness to [share a personal story] made it okay for me [to do the same]. I wanted to do a really great job for them"* (EngineeringCo Project Team Member).

> *"There was an icebreaker at the initial interview which helped. The start felt slow – stilted because of limited connection between parties"* (EngineeringCo Client).

> *"It's not a surprise to me but the way we were able to connect with each other, knowing each other and with strangers [made a difference in the project]"* (InsureCo Project Team Member).

Project teams had to prepare agendas, propose processes, and implement interventions, all of which represented important risk taking in the context of action learning.

At InsureCo, the project team felt strongly that a breakthrough opportunity existed, but they were hesitant to challenge the client to see the problem from a different perspective. The project team discussed how the action might get done and the risks associated with it. The client later reported in the immediate evaluation on how powerful the moment was, how it raised his appreciation for the team's ability, and contributed to his willingness to go deeper into the problem.

At AllianceCo, the project team confronted the CEO regarding her contribution to promulgating an unclear value proposition to group members. In her feedback to the faculty as part of the evaluation process, she believed that the group had helped her step into her leadership role more powerfully and opened up to the group about her doubts and fears.

As the projects progressed over several weeks in April-May 2020, the student project teams and client organizations were able to deepen their trust with each other beyond the historical reputations of the universities and two faculty leads. However, there was some variation in the ability to establish productive relationships. In at least one project, establishing a working

relationship was difficult. The client commented, *"I was very deliberate about the information I sent them, and I don't think they took it seriously. There are lots of clues in the documents if they took the time to engage with it. Did they read what I sent them carefully?"* The client suggested that it was the difficulties of the virtual environment that made building relationships and understanding the context of the organization difficult.

DISCUSSION

OD practitioners have used various action research approaches, since the field of OD began, to address complex social and transorganizational challenges (Lewin, 1944; Cummings & Worley, 2019). The existing literature supported action learning as an effective means for developing collaboration in a TS (Coghlan & Coughlan, 2015). Similarly, trust has been important to OD practice and the literature supported that trust and risk are flip sides of the same coin (Vangen & Huxham, 2010). However, while uncertainty, vulnerability, and risk (Rousseau et al., 1998; Lane and Bachmann, 1998; Gulati, 1998; Das & Teng, 1998) may be the "well-spring" of trust, research has not connected the processes of interorganizational collaboration, trust, and action learning. Our findings provide insights into the research question, *"How does action learning enable trust in a transorganizational system in an uncertain context?"* The discussion links relevant literature and clarifies our contributions.

The COVID-19 pandemic caused not just uncertainty but adversity for the faculty, students, and clients. A series of action learning cycles solved the problems of delivering an educational program in a virtual TS, and this research directly mapped behaviors that increased trust among stakeholders onto these different cycles, as illustrated in Tables 4 to 6. The action learning process encouraged participation and norms of equality through shared planning, reflecting, and knowledge sharing experiences. The willingness to share vulnerability, take risks in times of uncertainty, set and follow through on expectations, and leverage the reputation of individuals and institutions contributed to trust building (Schilke & Cook, 2013; Meyerson et al., 1996; Vangen & Huxham, 2010; Rousseau, 1998) and collective learning (Coghlan & Coughlan, 2015). To move the TS forward, problems had to be solved and the development of trust between the two university ecosystems facilitated those solutions.

This is the primary contribution of the research: action learning and cycles of trust work hand-in-hand. Performing action learning and developing trust may be interdependent, and the qualitative and longitudinal nature of our data allow us to tease out implications about the nature of that interdependence.

Four observations from the findings warrant brief discussion. First, given the uncertain conditions of the COVID-19 pandemic and the complexity and urgency of building the TS, all three trust categories -- risk/vulnerability/uncertainty, expectation setting, and history/reputation -- made important contributions to TS development, learning, and building swift trust (Meyerson et al., 1996). The data suggest that these three categories can be more or less useful over the course of action learning and TS development and make different contributions. Reputation and credibility can exist *ex ante* (or can be linked to institutional indicators). These facilitated early trust building cycles between the faculty leads and Universities. Expectation setting and risky/vulnerable behaviors contributed to expanding levels of trust and productive learning capacity. Such a finding pressures all of us in the field to be aware of how our current actions facilitate future contributions.

Second, existing relationships (history) and reputation were powerful sources of trust that cascaded throughout the TS to help solve problems in the absence of established relationships between Universities, students, and clients. It supports the work of Schilke & Cook (2013) in that interorganizational collaboration often begins between individual boundary spanners and diffuses to other levels of the TS.

History and reputation act as an umbrella that gives TS members permission to take the next risk. But trust afforded by history and reputation are meaningless outside a relevant context. TS leaders must focus planning, acting, reflecting, and learning on the relevant issues that need to be addressed. TS members are unlikely to invest effort solving insignificant problems. The potential power of history and reputation will be wasted. Moreover, leaders need to include and convene the right TS members around these issues for discussion. Otherwise, trust does not diffuse in the system. The current study suggests that *ex ante* sources of trust are important potential facilitators of an action learning approach to TS development.

Third, variability in experience and uncertainty around virtual consulting and remote work made upfront, intentional trust building – initially between University A and the clients and then between the clients and the student project teams – necessary. That is, when task uncertainty is high, small, intentional trust building behaviors are favored; the foundation for bigger risks must be built. Social interaction, including expectation forming and contracting, regular check-ins and feedback exercises, brainstorming sessions, and collective sense-making from the feedback and planning for the next cycle, confirm the work of Yström et al. (2019). When the problem being addressed through action learning is indeed challenging, complex, or uncertain, the creation of psychological safety (Edmondson, 1999) through the accumulation of trust becomes paramount.

We noted earlier that trust and psychological safety have often appeared together, but their relationship has not been operationalized. Especially in practice, psychological safety is encouraged through vague prescriptions such as create strong relationship networks or promote positive dialogue and discussion. Trust and psychological safety are often used to define the other – psychological safety requires trust and vice versa. There is a difference between trust and psychological safety as outcomes and the processes that produce them (Frazier et al., 2017). Trust is about feeling able to take a risk (Meyerson et al., 1996), psychological safety is about believing it's OK to take a risk (Edmondson, 1999), and trust formation is the process of moving from conditions of low trust/low safety to ones of high risk/high safety.

The data here point to psychological safety and trust as outcomes of risk taking, trust forming, and action learning. Trust and psychological safety in a new collaboration, unlike reputation, does not exist *ex ante*. The trust formation process, in the context of action learning cycles, suggests that OD practitioners work with TS leaders and members and encourage them to create this vital group dynamic. Consistent with Vangen and Huxham's (2003) "cycles of trust," it suggests that psychological safety is built step-by-step with small risks, setting low levels of expectations first, acting and reflecting on those small wins before taking on larger risks.

Fourth, and most importantly, while processes of action learning and trust formation can work together to build safety and trust, they only contribute to productive learning capacity when reinforced. Action learning and trust formation are separate research streams drawing on different disciplinary backgrounds. Scholars have suggested that trust facilitates learning without

exploring their provenance. As suggested above, being an integrated package does not mean the two are causally connected. Risk taking behavior in the context of action learning does not guarantee trust or psychological safety. Risk taking must not only be encouraged and chosen; it must also be accepted, embraced, and reinforced. The cycles of action learning and risk taking early in TS development were reinforced by positive outcomes and the lead faculty. Trust between the faculty and the cohort project teams enabled risk taking in the engagements and was reinforced by the client responses.

Action learning is a sequence of activities intended to solve practical problems and generate useful knowledge. The behaviors of OD practitioners, leaders, and TS members within that sequence can be safe and conservative or risky and creative. To create truly innovative solutions, the conditions must be set to encourage these riskier and vulnerable acts. OD practitioners and leaders are on the hook in this regard to model and reinforce such behaviors, just as the two faculty leads modeled risk taking by inviting each other to collaborate, inviting clients to participate, or confronting challenges during TS operation. Similarly, the AllianceCo project team perseverated over confronting the CEO on her role and other OD practitioners may have experienced similar anxieties in confronting leaders in these types of situations.

Risky and vulnerable behaviors that expand productive capacity can also be performed by an individual member's choice, but OD practitioners must acknowledge the existence of power differentials in such a situation. However, under either condition, the group must embrace the risk as legitimate – whether it generates an immediate positive benefit or simply opens the problem-solving process up to more creative possibility. Only then can trust be built, psychological safety created, and productive capacity increased.

Action learning cycles are a useful problem-solving capability as well as a powerful vehicle for trust formation. They expand productive capacity in groups, organizations, and TSs. Each step in the action learning process not only builds toward relevant learning within the TS but builds productive capacity via the development of trust.

Implications for organization development in creating a better world

This research suggests that our commitment to action-oriented methodologies like action research and action learning should be re-kindled. Action-oriented approaches have been used to address poverty, homelessness, climate change, and bias in the workplace. It can not only contribute to solutions, but this study suggests that it has the intended or unintended consequence of building trust among a set of stakeholders. It has proven itself an effective change process, able to handle the complexity of social and business challenges, and credible enough to generate useful knowledge. In a world where trust is flagging, action learning not only holds the promise of helping to solve some of the grand challenges facing governments, organizations, and citizens but of mending broken relationships and re-establishing a social fabric of respect and trust.

A second implication afforded by the context of this research, is the possibility of deep connections and trust formation in a virtual space. As OD practitioners, our professional relationships and networks have become even more important during times of global crises. Our interviews confirmed that many people believed that virtual experiences would be a "less than" alternative to in-person consulting and that the consulting might be hindered by limited visual cues. These constraints did appear; however, all the stakeholders in this TS were surprised and inspired by the level of connection built in virtual meetings over a brief period of time. OD practitioners can move from being disappointed in virtual consulting to being invigorated by a new way to connect with clients.

These results suggest that trust can be built quickly and can empower individuals and teams to work faster and more effectively in times of crisis. However, it requires intentionally pushing the edge of risk and vulnerability under uncertainty and following through on promises and expectations. In times of crisis, individuals must lean into the uncertainty and trust the people they are working with before trust is actually established. We must often co-create our history.

The data here clearly suggest that the effectiveness of trust building requires an intentional willingness to risk, lean into the discomfort, and desire to develop deep human connection. Deep virtual connection may require more time in designing trust building activities. The most useful design elements in virtual meetings focus on explicit connection rather than content alone. These processes differ from many traditional OD processes that rely on formal and informal face-to-

face encounters to become embedded in a system. Sadly – or perhaps fortuitously – it is the OD practitioner who may be in the role under the most pressure to "go first," to take the risks to build trust before others in a TS, an organization, or a group have established trust. This can be easy or hard. On the easy end, an OD practitioner can use meeting time effectively to check in, complete work, and review processes. These are relatively low risk behaviors that also contribute to productive learning. The potential of building trust in the action learning cycle prompts OD practitioners to purposefully give space for people to talk about the process, how it is working, and not focus solely on the deliverable. On the hard end, it may require the OD practitioner to raise sensitive issues, speak truth to power, or propose solutions.

CONCLUSION

This study illustrates that cyclical views of trust formation are closely aligned to the cycles of action learning. These cycles, working in tandem, enabled the execution of a temporary transorganizational system in the uncertain context of the early stages of the COVID-19 pandemic. The collaborative effort of University A and B was possible because initial levels of trust between the two faculty leads were cascaded to other stakeholders in the ecosystem. It created an environment for the co-creation of solutions with clients in the practicum projects. These solutions, too, were enabled by trust building/action learning cycles.

We showed how action learning cycles and trust cycles coincided to offer a collaborative advantage. Our theoretical contribution mainly revolves around the alignment of two distinct research streams of action learning and trust in TSs and our practical contribution is the "how to" of trust building in transorganizational systems to build a better world.

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