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Asset-based co-operative management: OPERA as a form of critical appreciation

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Abstract

The field of co-operative development is replete with invocations to practice participatory management. Furthermore, Moreau and Mertens (2013) have argued that participatory management should be part of the core curriculum for social enterprise (SE) management education. This study examines a participatory management approach called OPERA to establish its contribution to critical appreciative processes (CAPs) within an appreciative inquiry (AI). We participated in four OPERA sessions involving 75 co-operative and SE educators, consultants and managers between July 2014 and April 2016. We retrospectively examined the results of the first two sessions, made reflective diaries of the final two sessions and then practised OPERA in our own educational practice to authenticate findings. We found that OPERA: improves the perceived quality of meetings; elicits a broad range of topics from participants; assists non-hierarchical management practice, and; promotes direct democracy. Our study obtained credible evidence that OPERA contributes to the discovery, dream and design parts of an AI cycle, but not that it promotes *critical* appreciation. As OPERA processes are ‘appreciative’ in the way they undertake *choice selection*, they represent an asset-based inquiry process that advances co-operative management.

Keywords: appreciative inquiry, critical appreciation, critical management studies, social enterprise, cooperation.

Introduction and study context

Our starting point is the stated commitments of social enterprises (SEs) to co-operative learning and development that brings about social transformation (Alvord et al., 2004; Nicholls, 2006; Ridley-Duff and Bull, 2015). Social entrepreneurship education – as a field - reflects a new desire that educators in business schools develop approaches to management learning that are inclusive, value-driven and democratically grounded (Martin and Osberg, 2007; Pache and Chowdry, 2012; Doherty *et al.*, 2015; Winn and Neary, 2016). This paper develops knowledge of the potential of OPERA – a set of protocols for improving the quality of decision-making in meetings - by studying its use amongst SE educators, consultants and managers.

The field of SE is replete with invocations to practice participatory management and stakeholder governance to counter the effects of neo-liberal doctrine (Nicholls, 2006; Defourny and Nyssens, 2014; Hulgard, 2014; Ridley-Duff and Bull, 2015). OPERA is a five stage process developed by consultants at the Integrated Consulting Group (ICG) in Stockholm (Slaen, Mantere and Helin, 2014). After observing its use in SE development, we grew curious about its potential to enhance *critical appreciative processes* (CAPs) within an appreciative inquiry (AI). As a result, we framed the following research question (RQ) ‘What learning mechanisms are triggered by OPERA, and do they influence the development of CAPs amongst practice-oriented SE professionals?’

Moreau and Mertens (2013) have established empirically that participatory management and stakeholder governance are desired by SE managers themselves. As the advocates of OPERA position it as an effective technique for ‘true participation’ (Slaen et al., 2014, p. iv) that counters ‘fake democracy’ (*ibid.*, p. 72) there is a case for studying whether its claims can be observed empirically. OPERA may offer a new approach to learning and managing for SE professionals.

CAPs are a development of AI that include three innovations: firstly, more time and space is given to the deconstruction of the status quo; secondly, more sensitivity is shown towards participants who need to share ‘negative’ experiences before they can refocus on hope (Grant, 2006; Boje, 2010); and lastly, there is a focus on *generative* questioning, rather than positive thinking (Bushe, 2007, 2013; Cooperrider and Srivastva, 2014; Ridley-Duff and Duncan, 2015). Our hunch is that OPERA can assist SE development by aligning with the intended outcomes of CAPs (democratic, inclusive dialogue that leads to critical appreciation).

Our engagement with OPERA is the result of attending events where it was used by consultants from Social Enterprise Europe Ltd (SEE). Our fieldwork took place in OPERA sessions run by directors of SEE where OPERA’s five stage process was deployed to encourage SE development. Studying OPERA’s use in the field of SE is a good way to evaluate the contribution of its ‘mechanisms’ to CAPs (Pawson and Tilley, 1997).

This paper is divided into five sections. Firstly, we review approaches to SE management education. We highlight how functionalist approaches were initially imported from private sector performance management systems into MBA-like curricula (Somers, 2005; Bull and Crompton, 2006; Doherty *et al.*, 2009). We then show how functionalist approaches have been replaced either by a more competency-based model informed by in-depth empirical investigations (Bull and Crompton, 2006; Moreau and Mertens, 2013) or a more critically reflexive approach that takes account of power within specific contexts (Paton, 2003; Bull, 2008; Douglas and Grant, 2014; Ridley-Duff and Bull, 2015). The first section concludes with a presentation of CAPs as an approach to management learning based on a social constructionist epistemology and the pursuit of emancipatory goals. We link its assumptions to OPERA to set the scene for fieldwork. Secondly, we set out the design of our study and way we collected and coded material from four OPERA sessions. Thirdly, we report our findings and interpretation of OPERA ‘mechanisms’ in each stage of a CAP (Pawson and Tilley, 1997; 2001; Ridley-Duff and Duncan, 2015). Finally, we clarify our contributions to knowledge that: 1) OPERA can ask both appreciative and critical questions; 2) the selection (ranking) of ideas is ‘appreciative’ because no time is spent talking down ideas, and; 3) that while OPERA assists dialogue, its role in CAPs depends on the questions asked and the way processes are facilitated.

Literature Review

In our review of the literature, we have three aims. Firstly, we briefly comment on the development of functional and competency based management learning and its relevance to SE education. Following this, we introduce the assumptions of appreciative (asset-based) approaches to management. Finally, we introduce OPERA to comment on its alignment with AI’s asset-based approach. Central to that debate is the way tensions between social and economic aspirations are balanced in SE management. This tension is further complicated by the range of stakeholders who bring multiple goals (Griffith, 2009).

Functionalist Approaches

Tools for SE education have focused on provision of instruments to assist with strategic planning. For example, both Somers (2005) and Bull (2007) developed instruments based on the Balanced Score Card (Kaplan & Norton, 1992; Meadows & Pike, 2010). Others have adapted the Business Canvas into a Social Lean Canvas (Osterwalder, 2004; Yeoman & Moskovitz, 2014) to assist business planning, while Royce (2007) outlines tools for human resource management. Each of these tools addresses one of multiple challenges identified by Doherty *et al* (2009). All have strong foundations in identifying and evaluating the functional value of including stakeholders in governing bodies or consulting them during business planning. As Wright, Paroutis, and Blettner (2013) observe, the application of business tools is typically to aid and guide decision making, whereby complexity and uncertainty might be reduced so that better and more informed decisions can be made, and

communication of outcomes can be enhanced. Wright *et al.* (2013, p.114) conclude that managers choose to employ business tools that “provide multiple perspectives, help users to come up with new ideas and perform analysis from different angles, show interconnectivity between entities, divide areas to give a clearer picture, and guide the thinking.” As such we might conclude the focus, intent and outcomes of management education is grounded in the learning the functions of management. Given the tensions and complexity experienced by SE managers (Bull, 2008; Goldstein, Hazy and Silberstang, 2009), it is reasonable to assume they will seek assistance from business tools that simplify these functions. We review three examples to illustrate the mixed results that can occur.

Meadows and Pike’s (2010) study of Balanced Score Card (BSC) as a performance measurement tool for SE showed a strong focus on outputs. Their analysis found that BSC provided helpful information to investors both at the time of initial investment and later during monitoring and/or evaluation. The value of BSC was also recognised for highlighting organisational issues, and promoting planning and reflection. Limited detail is given however, on how such application bring together multiple narratives from different stakeholder groups. Focusing more on the development of strategic capability, Sanches-Palacio *et al* (2013) investigated the application of tools in work integration SEs. Their sample of 129 organisations demonstrated how these tools were found to have a positive influence on social effectiveness (improving the employment rate) but negative impact on economic effectiveness (profitability) (p. 541). Mouchamps (2014) also considers the impact and relevance of strategic planning and reporting tools, and economic optimization techniques, which are applied by SE managers. He concludes that such tools almost “globally fail to account for the specific features of social enterprises” and in many cases lack strong theoretical bases. As such he calls for further research into the way tools are developed and used.

Patton (2003) also considers a range of tools which may be applied within SE. He identifies how generic tools may or may not be helpful. Isomorphic pressure from ‘management fads’ and the institutional environment help explain the increased application of ‘business’ tools in SEs, but Patton (2003, p.159) highlights how “the context of use, and how a method is applied matters much more than its origins.” As such, Patton (2013) identifies three attitudes that develop amongst managers when they make use of management tools:¹

- a ‘committed’ approach, with an internalised commitment to functionalist, positivist management approaches, coupled to a strong belief in the value of such tools, and the discourse that accompanies them. Loss of flexibility is identified as a key risk of this approach.
- a ‘cynical’ approach, whereby managers may become sceptical and distrusting of management tools and applications and deploy them only to conform to external funder requirements or to secure calculative compliance with management norms that confer legitimacy.

¹ Although Patton is working within the context of performance management and performance improvement tools, we suggest these approaches are equally applicable when using decision making tools such as OPERA.

- a ‘reflective’ approach, whereby a healthy level of critique and caution is applied during use of a tool, so that the team involved remain alert to its limitations and potentials for abuse and distortion, either of the method itself or the outcomes identified. Within this reflective approach, context is critical, the narrative(s) of stakeholders are recognised, and the value of relationship building is considered alongside the value of the findings that the tools provide.

Paton’s ‘committed’ and ‘cynical’ approaches are neither *critical* (in the sense of deconstructing the underlying premises of management knowledge) nor committed to competencies that go beyond the following of prescriptive procedures to demonstrate compliance. In the next sub-section, we examine how Moreau and Mertens (2013) introduce a different perspective rooted in the social construction of norms based on a ‘reflective’ approach that considers context.

Competency-Based Approaches

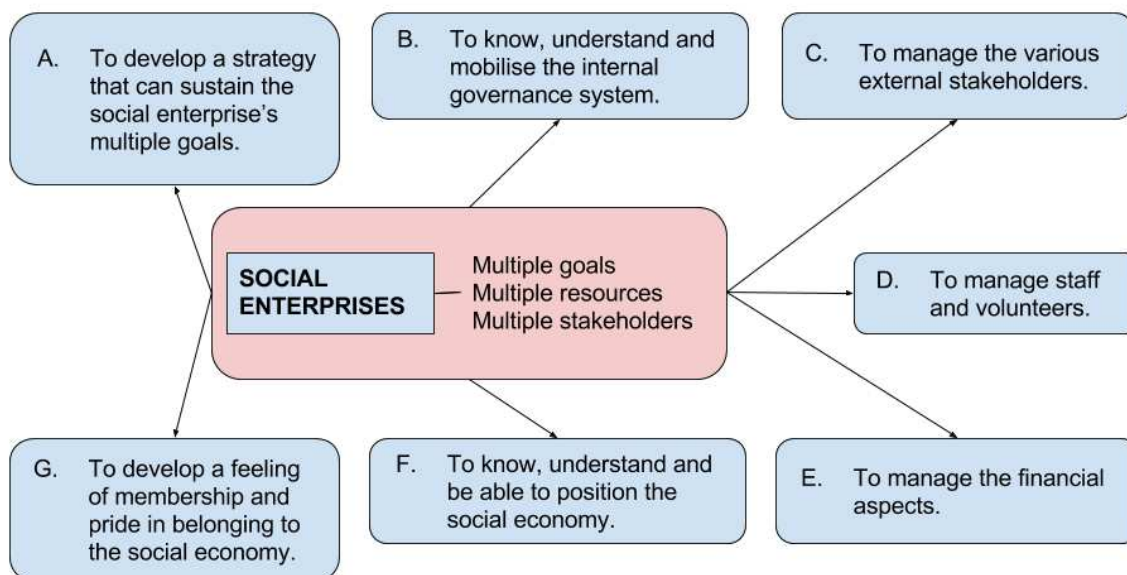
A switch from functional approaches to SE management to a competency framework has been proposed by Moreau and Mertens (2013) who identified seven competencies through empirical research with social enterprise managers across a number of EU countries (see Figure 1). These competencies are then broken down further to include knowledge, skills and behaviour relevant to each. It is interesting to note that the authors recognise that dependent on the size of an organisation, “knowledge, skills and behaviours do not have to depend on one single person, the manager, but rather whole management team” (Moreau & Mertens 2013, p.167). They also observed how each competence is dynamic and socially constructed, and as such might be considered contextual.

Each competency is expressed in terms of: knowledge – what it is “necessary to know in order to manage a social enterprise” (p. 171); skills – the ‘know-how’ needed to apply knowledge in the context of management, and; behaviours – the general capacity to behave adequately with the environment and build relationships with others (p.171). The competency related to managing multiple stakeholders, which calls for ‘flexible behaviour’ and collaborative skills (pp.173-174) appears - at first glance - to be one where OPERA will help. Similarly, the competency of knowing, understanding and being able to position the social economy (p.176) involves a commitment to critical thinking and reflection that may be enhanced by OPERA processes.

Although there is some evidence of the value of management tools in SE scholarship, the findings to date suggest there is scope to advance SE management through carefully structured and focused educational experiences. Tools that assumes management is a series of technical functions may struggle to adequately achieve vocal plurality and fail to respond to the needs of multiple stakeholders pursuing multiple goals. Building on Patton’s ‘reflective’ approach, we suggest that support is needed from the development and implementation of a critical lens (Grant, 2014), which - when applied to existing tools and frameworks - can accommodate complexity in the management of multiple goals and interests. Specifically, in this paper, we consider the contribution of appreciative (asset-based)

approaches to learning and development, and their role in participatory decision-making (Grant 2006, Ridley-Duff & Duncan 2015).

Figure 1 – The competence model for the management of social enterprises



Adapted from: Moreau, C. and Mertens, S. (2013) 'Managers' competences in social enterprises: which specificities?', *Social Enterprise Journal*, 9(2): 164-83.

Appreciative Inquiry and Critical Appreciative Processes

Appreciative inquiry (AI) is a process that can be used to generate, implement and manage changes in training and development, organisations and communities. The 4D cycle of inquiry (discover, dream, design, destiny) presented in Cooperrider and Whitney (2000) (Appendix A) is a common representation of the AI process. Starting from a positive statement or proposition, the process moves into envisioning and dialoguing phases. Participants identify what is 'good' in the current situation (discover) and then aspire to what the best may be (dream). From here, the process encourages participants to build on strengths identified during the discovery phase to achieve their dream (design and destiny). Through the process, participants develop a greater awareness of their powers of interpretation and imagination, and the impact 'other' world views have on their social relationships. Noting this greater awareness, scholars have found that the value of appreciative inquiry often lies beyond its formal process and rests in its capacity to bring about changed understandings (Barge & Oliver, 2003; Bushe & Khamisa 2004; Grant 2006). Bushe (2007, p.1) observes "AI does not magically overcome poor sponsorship, poor communications, insensitive facilitation or un-addressed organisational politics," but it is adept at raising awareness of how we co-construct our image(s) of ourselves and our future. Fitzgerald *et al.*'s (2010, p. 221) view of AI is "people inquiring together into the infinite potentials and varieties of human organisation."

van der Harr and Hosking (2004) advance Gergen's work to position AI as having a *generative* capacity, whereby participants may challenge assumptions and furnish people with new alternatives for action. Indeed Bushe (2013, as cited in Ridley-Duff & Duncan 2015) identifies generative questioning as the starting point for an effective appreciative inquiry, rather than the positive topic encouraged by the 4D cycle (Cooperrider & Whitney, 2001). Stimulating generative capacities using AI enables the co-construction of new realities based on new social relationships. Presenting AI as a social practice that can actively (co-)construct alternative identities and worlds, van der Haar and Hosking (2004) emphasise the importance of relational constructionism, whereby interaction and dialogue between participants facilitates the collaboration that co-creates possibilities. Thus participants can 'be with' rather than 'for' or 'against', and local ontologies and realities can be accommodated within the process. This generative capacity is also claimed by advocates of OPERA (Slaen et al., 2014, p. 43-44).

Consistent with Patton's (2003) call for 'reflective' approaches we believe it is not sufficient to merely apply a tool or framework in a prescriptive manner. Critical consideration of the process, context and outcomes is essential if the voices of all stakeholders are to be accommodated. Appreciation need not just focus on 'what is good' any more than critical theory need be overtly 'negative'. *Critical appreciation* encourages us to look deeper. In the context of a paradigmatic commitment to criticality, appreciation examines 'what is?', 'what might have been?' as well as 'what is good?' in order "to know, to be more conscious of, to take full and sufficient account of" a situation (Grant, 2006, p. 286). Such an application supports CAPs that allows participants to 'manage' the system imperatives that interrupt their pursuit of new practices (Ridley-Duff & Duncan 2015, p. 1582). Having reviewed CAPs, we now turn our attention (briefly) to OPERA as a learning process. In doing so, we highlight its authors' assumptions regarding participatory practice and comment on its alignment with CAPs.

OPERA

OPERA is a holistic participative process, developed by Swedish consultants working for Innotiimi (Slaen et al., 2014). Innotiimi is part of an EU-wide company, ICG Consulting Group. OPERA is advanced as a process that challenges hierarchical dominance in meetings. Originally used for group problem solving, applications of the process are now applied in teaching, learning and planning contexts. Underpinning the process is a desire to counter the negative effects of extroversion. An individual's fear of group critique is managed through the process of engagement. Participants start by considering their own ideas on a topic before pairing for further discussion.

Beginning with a topic/question of focus, the process has five stages:

- O** Own ideas – each person works independently to think of their responses to the topic/question posed.

- P** Pairing – building on the assumption that working in pairs is a ‘safe’ way to share ideas, people are paired up to share their responses with each other.
- E** Explaining - Each pair then decides which of their ideas to present to others. These ideas may be related to the initial question posed, or may be something that surfaced during discussion.

The chosen ideas are written in full sentences on sheets of paper then placed on an OPERA board. When explaining, both partners are encouraged to speak to the wider group but the emphasis is on brevity. The purpose of the oral presentation is to clarify the meaning and intent of the statement(s) before undertaking the final two stages.

- R** Ranking – Still working in pairs, each group casts several votes for the ideas they want to carry forward. Only 1 vote can be cast for their own ideas.
- A** Arranging – Statements that receive no votes are removed and the remainder are arranged into common themes to shape and clarify what actions will need to be organised.

OPERA involves a separation of idea generation (OPE..) from evaluation (..RA). Slaen et al. (2014) argue that the generation process is inhibited if participants face immediate evaluation of their ideas. The first three phases, therefore, emphasise positive selection rather than critique (p. 28-29). This is also advanced as cost effective because time is not wasted on ideas that have no support. The pairing process is designed to protect individual egos so that participants focus on the ideas, not the messengers. The protecting of egos is seen as important because participants need to remain engaged even if their ideas are not selected.

Importantly, pairs can only select one of their own ideas during ranking to promote listening, engagement and evaluation of other ideas. Furthermore, Slaen et al. (p. 28) distinguish 'critical' and 'creative' sides of the brain. They assert that if a few choices are presented in sequence, the critical brain is engaged. However, when wide range of choices is presented, the creative brain is engaged. They clearly prefer to stimulate the creative, rather than the critical, side of the brain. The emphasis on creativity and positive selection trumps destructive critique, and we suggest this is aligned with AI principles.

Unlike AI, the OPERA guide accommodates ‘deficit-based’ questions (p.31-34). We differentiated nine question types:

1. Deficit-based questions (What problems do we have doing / operating in x?)
2. Descriptive questions (What factors influence x?)
3. Positive change questions (How can we change x to y?). What is the best way to develop x?)
4. Affirmative problem-solving questions (How can we overcome problem x?)
5. Target achieving questions (How can we halve the waste of x? How can we meet target y?)
6. Generative choice questions (What reward systems could we consider?)
7. Purpose setting questions? (Why do we want to lead on this issue?)
8. Ideal state questions (What do we want to accomplish on is project?)
9. Priority setting questions (On which projects shall we concentrate?)

OPERA practitioners, therefore, are agnostic on whether questions should be framed to elicit positivity, but are clear about the positive selection process for responses. Like AI, OPERA's mechanisms for decision making are designed to help people feel secure in themselves and within the group, and to positively select good choices, rather than debate or destroy poor choices. This is underpinned by psychological theory about what makes people feel insecure and negative about their ideas and status within a community. With these issues in mind, we now turn to the methodology we deployed to inquire into each of OPERA's mechanisms.

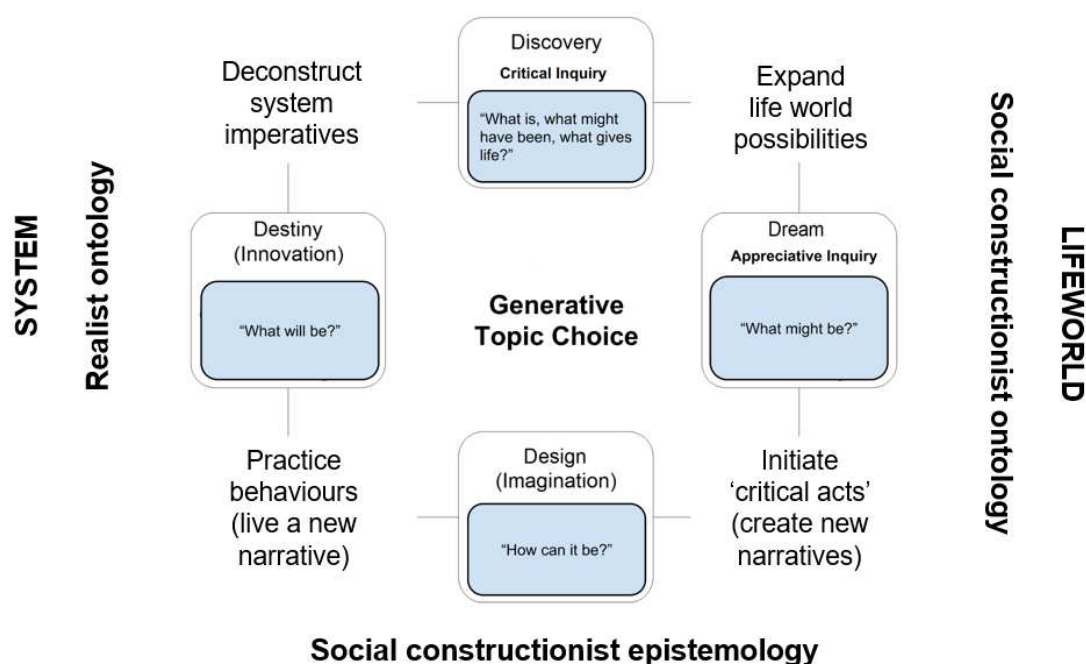
Methodology

We have drawn attention to the 'reflective' strand in SE management education that we want to investigate further. Our research strategy is rooted in a critique of functionalist theories of management, but may have application to competency-based theories where norms are recognised as local context-specific 'know how' that has been socially constructed (Paton, 2003; Moreau and Mertens, 2013). We are influenced by our own contributions to the critical turn in appreciative inquiry, based on a Habermasian view of systems and lifeworlds. This requires a careful explanation of our ontological and epistemological assumptions, and the impact these have on our methods.

Figure 2 shows the dual ontological assumptions that inform this study: within the lifeworlds of individual actors there is an inter-subjective reality that shapes each person's construction of the here and now (<'what is, what might have been, what gives life?>). These, in turn, are expressed through narratives (both practice-based and spoken) that guide and shape the choices we consider <'what might be?'>. In this sense, reality is a social construction, produced and projected through the social practices and spoken articulations of the choices we are able to make <'how can it be?'> (Gergen, 2014). As a result, our research strategy recognises the value of communicative action framed by critical realist assumptions, and the use of quasi-ethnographic participant observation to reveal the mechanisms that shape 'how things work' <'what will be?'> (Bhaskar, 1978; Habermas, 1987; Pawson and Tilley, 1997; Finlayson, 2005; Watson, 2011). In the 'destiny' part of AI, a realist perspective is adopted because not all new behaviours are possible in specific contexts, and actions can have consequences based on the way rules are interpreted by people within a community of practice (Wenger, 1998).

We examine how OPERA processes contribute 'mechanisms' that stimulate thought in the eight stages of a CAP (Figure 2) and stimulate narratives amongst SE educators, consultants and managers. We are interested in how they decide 'what will be'.

Figure 2 – A critical appreciative process initiated by a generative question



CAPs interpreted using Bushe (2013); Grant (2014) and Ridley-Duff and Duncan (2015).

Our philosophy, therefore, is social constructionist in its epistemology (see Figure 2) but variable in its ontology because we recognise both the subjective realities that guide human action and the constraints in social systems that prevent learning mechanisms from triggering in certain contexts under specific conditions (Pawson and Tilley, 1997).

Between us, we participated in four OPERA sessions run by Social Enterprise Europe Ltd (SEE) between July 2014 and April 2016. After the first two, we retrospectively collected photos and statements of outcomes published by SEE under Creative Commons licences. In the third session, we negotiated the initial question and made two reflective diaries detailing our experiences as participants. In the final session, one researcher created a reflective diary after co-facilitating an OPERA session with SEE’s trained facilitator. We were able to observe, participate and reflect on participation and facilitation across four OPERA sessions before reflexively testing it in our own teaching to confirm the trustworthiness and authenticity of our findings (Guba and Lincoln, 1985).

Table 1 summarises the four sessions, detailing the acting host, participant groups, location, event type and OPERA question for each. Each setting is a good choice because of content that focuses on management learning in the social economy, and the hosts are appropriate because they each seek to engage practice-oriented SE professionals in management education. The FairShares Association is a network consultants, educators and social entrepreneurs that support management education by publishing books, research instruments, videos, learning activities and model rules for multi-

stakeholder social enterprises.² Social Enterprise Europe Ltd describes itself as “a co-operative network of educators, consultants and social enterprise advocates”³ that “create courses and materials that lead to the effective management of social enterprises.” Lastly, the Co-operative College has operated for almost 100 years “providing world class learning programmes” that develop “a successful and diverse co-operative sector”⁴.

Table 1 – A summary of the four OPERA sessions

	Acting host	Participant profile	Location / event type	OPERA question
1	FairShares Association, Sheffield	24 participants: students and staff from English and Scottish universities, local councils, voluntary sector and co-operative infrastructure bodies, housing groups, consultancies and local SEs.	Sheffield Business School, SE Practitioner Conference (July 2014)	What priorities do members of the association want to set for the next year?
2	FairShares Association, Sheffield	22 participants: staff from worker co-operatives, housing groups, local councils and infrastructure bodies; staff / students from English, Norwegian, Australian and New Zealand universities.	Sheffield Business School, SE Practitioner Conference (July 2015)	When is the FairShares Model at its most attractive and useful?
3	Social Enterprise Europe Ltd, Whitby.	13 participants: British Council staff delivering the global Skills for Social Entrepreneurship Programme; staff from the Co-operative College and Social Enterprise Europe; staff / students from English, Cuban and Panamanian universities.	York St John University, SE Education Conference (August 2015)	How can studying the social solidarity economy revolutionise enterprise education?
4	Co-operative College, Manchester	16 participants; staff and students including co-operative educators and university lecturers in the UK and Canada; plus consultants and practitioners from the UK and EU co-operative movements.	Manchester Metropolitan University, Coop Education Conference (April 2016)	When is co-operative education at its best?

Data collection followed a process of *naturalistic inquiry* (Lincoln and Guba, 1986). We did not proactively organise any OPERA sessions that were not already planned to take place. Instead we waited for opportunities to observe and participate in sessions run by a qualified OPERA specialist. Our interventions were limited to negotiating the opening question in sessions 3 and 4, and co-facilitation of the final session.

We had access to photos of all sessions plus published statements of the outcomes and decisions made. The authors’ reflective diaries (sessions 3 and 4) added 5,200 words describing details of OPERA practices and providing early (in situ) reflections. Both authors coded all reflective diaries against the eight elements of a CAP (Figure 3). To make our analysis more rigorous, we undertook a critical reading of the book recommended by SEE’s OPERA facilitator (Slaen et al., 2014) then both authors coded the notes made against the CAP cycle. We also compared our findings to

² <http://www.fairshares.coop/membership/>, accessed 15th Feb 2016.

³ <http://www.socialenterpriseeurope.co.uk/about-us/>, accessed 15th Feb 2016.

⁴ <http://www.co-op.ac.uk/about/>, accessed 15th Feb 2016.

documentation supplied in an online OPERA app for Windows PCs and worked through an online OPERA session to test the integrity of the process.

The next section details our findings. We report and explore our own subjective experiences while concurrently observing outcomes reported by participants. At all times, we focus on ‘how things work’ (Watson, 2011) to establish whether OPERA is aligned (or not) with CAPs. In the final section, we pinpoint our contribution by setting out how OPERA can contribute to critical appreciation.

Findings

Our findings are based on a coding of our notes and reflective diaries combined with a review of photos and outcome statements from all four sessions. The tables show claims in OPERA documentation alongside fieldwork experiences. Throughout, we use the key: O = Own Ideas, P = Pairing, E = Explaining, R = Ranking, A = Arranging.

Table 1 – Discover – Dream Phase

CAP	OPERA documentation	Fieldwork
1. ‘Discovery’ (Critical Inquiry)	<p>“How does OPERA assist with the discovery of ‘what is, what might have been, and what gives life?’”</p> <p>Use “what” questions (S1, p.11) during the O phase (S1, p13-15). Phase 1 is fully supported in the app allowing both synchronous and asynchronous operations. The app asked whether to initiate audio and camera when joining.</p>	<p>Participants were given an opportunity to generate their own ideas during every O stage. In all cases, this was followed by a random ‘pairing’ technique. New ideas were sometimes generated during P after thoughts/ideas were exchanged.</p>
2. Expand life world possibilities	<p>“How does OPERA generate critical appreciation that sensitises participants to meanings given to their world?”</p> <p>(Book and app documentation identical). Use “what” questions (S1, p.11). O and P phases change dynamics between introverted and extroverted people, and overcomes limitations in group processes to generate more perceptions (S1, p.8). The O phase encourages vocal plurality (S1, p13) while the P phase sensitises people to ‘others’ (S1, p.15). The E phase sensitises the wider group, but inhibits dialogue (S1, p.17-19). R phase encourages sensitivity to others ideas as you can only vote for one of your own (S1, p.19-22)</p>	<p>During the O phase “participants asked to respect the space of others” and “to think quietly”. The facilitator emphasised the value of having ‘your own thoughts’. Shy, introverted participants reported that they appreciated the ability to ‘gather their thoughts’. The quietness of the room during the O phase was replaced with a buzz of discussion during the P phase. The P phase was guided by the idea “it is easier to share ideas with one other person than with a whole group”. The E phase gave pairs a chance to expand each other’s lifeworlds and generate sensitivity. Starting with a ‘positive’ question did not guarantee positive responses, but “starting small greatly increases the total number of outputs/responses generated.”</p> <p>We observed that people looked relaxed during the P phase.</p>

Figure 3 – OPERA participants during the Pairing phase (session 4)

As our findings suggest, the first two phases (O and P) were successful at generating a significant number of statements. In session one, 25 ideas were explained by 12 pairs. In the second, 26 ideas were advanced by 11 pairs, with 14 ideas from 7, and 17 ideas from 8 in the third and fourth sessions.



The number of ideas advanced could have been increased as each pair was asked to agree two or three ideas from a pool of six to eight ideas. In reviewing the field notes from session 4, we noted that the trained OPERA facilitator suggested not saying anything about the ideal number of ideas during the early part of the P phase because this would inhibit idea generation.

Table 2 – Dream – Design Phase

CAP Part	OPERA documentation	Fieldwork
3. 'Dream' (Appreciative Inquiry)	<p>"How does OPERA assist with the (mental) generation of possibilities so that participants dream about 'what <u>might</u> be?"</p> <p>(App supported all possibilities in the book). Use 'how questions' (S1, p.11). The O phase generates more ideas than a group meeting (S1, p. 13). P expands possibilities as you have to listen to others (S1, p.15-17). In online documentation, crafted explanatory text explains the ideas nominated, which changes the boundary between the P and E phases.</p>	<p>The P stage addressed problems of generating ideas within a group. People advanced ideas regardless of their confidence level. Responses to the original question were sometime posed like a dream, e.g." (FairShares is most attractive when "it empowers groups of people to create a knowledge commons.") Some responses were framed as 'normative aspirations' (encouraged by the positive framing of the question). Working in pairs was found to be 'safe' for sharing 'dreams'.</p>
4. Initiate 'critical acts' (generate new narratives)	<p>"How does OPERA generate appreciation of 'critical acts' that articulate new possibilities?"</p> <p>Use 'How questions' (S1, p. 11). E phase designed to avoid "time thieves" (no wasted time discussing bad ideas). Use "Why" questions with a future orientation (S1. p.34) to discourage descent into accusations and/or defensive positioning. In the P phase, the selection of important ideas and writing as sentences represents a 'critical act'. In the A phase (S1, p.22-24), more critical acts occur as narratives are assembled from participants sentences.</p>	<p>The act of writing down ideas (P stage) in complete sentences is a 'critical act' (Arendt, 1958). As each pair decides which ideas go into the E phase, they began to articulate narratives around each idea.</p> <p>The facilitator insisted that all voices were heard (varies from book recommendation). Each pair given 1 min per idea – sometimes timed. The facilitator asked participants to focus on clarifying the idea to remove ambiguities, and prevented critical comments during E phase.</p> <p>R phase generated more narratives as pairs made sense of what to vote for (critical narratives generated). R phase provided opportunity to challenge the 'status quo' through voting for unusual (original) ideas. R phase decides which (new) narratives will dominate.</p> <p>N.B. There is little <i>proactive</i> deconstruction of dominant discourses, just advancement of preferred discourses.</p>

Research has noted how loose networks of individuals can be more productive at generating ideas than groups undertaking brainstorming activities. As Hoever (2012, p. 3) points out:

"Teams, in this line of research, represent a rich source of production losses in the form of social inhibition (Diehl & Stroebe, 1987), production blocking, and cognitive interference (Nijstad, Diehl, & Stroebe, 2003) which is rarely outweighed by the cognitive stimulation that the ideas of others may provide."

Following Guilford (Anon, 1950), research into creativity and brainstorming has focussed on elaborating four elements of creativity: fluency (number of ideas); flexibility (number of categories); originality (unusualness), and elaboration (building on other ideas). Our finding suggests that OPERA supports ‘fluency’ based on the consistently high number of ideas generated in the O and P phases. This supports findings by Oxley et al. (1996) that trained facilitators can help to overcome the poor fluency of face-to-face group meetings by preventing ‘anchoring’ (the dominance of early ideas), and limiting the influence of extroverts on the development of conversations.

In moving from P to E (Table 2), participants start to engage in ‘critical acts’ (Arendt, 1958). The switch from sharing ideas to writing them down requires a move from verbal to written articulation of ideas. We found this phase generated well-articulated statements that found their way into the final outcomes published after the session (see Appendix B). For example, in session 3, participants created text that was later published by SEE. In response to the question “How can studying the social solidarity economy revolutionise enterprise education?” three statements were crafted into the following paragraph:

By understanding the multiple perspectives of participants in the solidarity economy, more effective integration of its social and economic aspects can be achieved. Engagement will enhance knowledge of the relationship between the theory and practice of social entrepreneurship, and build bridges between the institutions of organised labour, social entrepreneurship and cooperative development.

Theme 2, SE Education Conference, York St John’s University, August 2015

Figure 4 – Participants explaining their ideas to other participants (session 4)



While E phase gave relatively little opportunity for critical comment, this resurfaced during R phase as pairs of participants reviewed ideas and decided which to vote for. However, the time scales for this are short (5 to 10 minutes), insufficient to systematically study and investigate ideas before they are ranked.

While it is not possible within an OPERA to ‘live a new narrative’, the foundations for doing so can be laid. In session 1, participants selected five priorities for the FairShares Association. Each were posted to a Loomio Group (Loomio.org). We found some of them still active after two years (particularly ‘Getting FairShares Discussed Everywhere’).⁵ Another (‘Establish Pilot Enterprises’),

⁵ The thread, including new ones, are at <https://www.loomio.org/g/9asOJB5F/fairshares-association>.

while inactive on Loomio, has been realised in both the UK and USA (see Ridley-Duff, 2016).

Table 3 shows findings from the ‘design’ part of the CAP cycle.

Table 3 – Design – Destiny Phase (Reflective Note Analysis)

CAP Part	OPERA documentation	Fieldwork
5. ‘Design’ (Imagination)	<p>“How does OPERA assist with the generation of narratives that express ‘how (the future) can be?’”</p> <p>Use “which” questions (S1, p. 11), “what should be” questions (S1, p.17-19) or “why” questions with a future orientations to generate design ideas (S1, p.34).</p> <p>The R process (p.19-21) links to design by screening and selecting ideas. The facilitator may influence selection criteria for the R phase. The A phase involves grouping ideas into themes (design) and participant-led justification of choices (S1, p.23).</p>	<p>Participants decided which ideas to present (P phase) and this shapes design. This is refined throughout the R and A phases. The process of eliminating unsupported choices (after ranking) is an act of design as some choices are preferred. Screening actually occurs as early as O and P phase (e.g. “I toyed with a fourth idea [...] but decided not to write this down.” The power to determine selection criteria could rest with the facilitator or group, depending on context, so there is potential for the facilitator to shape design (and also abuse power).</p>
6. Practice behaviours (live a new narrative).	<p>“How does OPERA facilitate new behaviours so that participants appreciate how to ‘live a new narrative?’”</p> <p>In the Preface (p. v), OPERA is contrasted to a traditional meeting as it brings ‘planning ‘and ‘doing’ together. OPERA itself is living a new narrative regarding power and participation.</p> <p>The use of “which” questions supports making design choices (S1, p.12). The A phase should be guided by participants. This casts the facilitator as coordinator of a non-hierarchical decision making process (S1, p.22-24).</p>	<p>There are still risks that ideas / outcomes reinforce the status quo, but working in pairs to select topics/statements provides a safe environment to practice new behaviour/narratives. Brevity during E is designed to stop people “being a wind bag”, but is also an inhibitor of critique.</p> <p>The R phase process was influenced by being surrounded by the other teams. By crowding around the OPERA board we heard snippets of other team’s discussions, which may have influenced our choices. The facilitator warned against collusion. The process influenced the practice, but we are not sure if new behaviours were an outcome.</p> <p>The A phase put statements into themes which could become the basis of a new practice.</p>

Figure 5 – The facilitator arranging participants’ ideas (session 3)

The grouping of ideas in the A phase of an OPERA is where clustered ideas are re-conceptualised.

This occurred in three of the four sessions (five themes in session 1, three in session 3, and three themes in session 4). In session 2, only a ranked list of items regarding ‘When the FairShares Model is at its best’ was sought, so ideas were not arranged into clusters.



Arranging is part of the design cycle of a CAP as it requires participants to abstract concepts around which ideas are clustered, then find language to describe them. In the OPERA book (Slaen et al., 2014) arranging was presented as a pre-cursor to asking people to take responsibility for new activities. Such allocations took place in session 1 as different members of the FairShares Association took responsibility for different priorities. However,

arranging can also involve grouping ideas for the purpose of articulating statements about them. In sessions 3 and 4, statements were crafted and reported back to conference delegates and organisers (see Appendix B).

Lastly, we report findings from the Destiny – Discover part of the cycle in which participants establish and deconstruct the new status quo by examining how things are at present (Table 4).

Table 4 –Destiny – Discovery

CAP Part	OPERA documentation	Fieldwork
7. 'Destiny' (Innovation)	<p>"How does OPERA enable participants to control 'what will be?' (i.e. actively shape practice)."</p> <p>The A phase is oriented to 'deciding what will be' and the facilitator can encourage collective decisions over language and labelling S1, p22-24.</p> <p>The act of committing to a theme shapes practice/determines 'what will be'. The book notes that participants comfort levels will influence practice, and they will choose to enact those actions they are comfortable with (p.22-26).</p>	<p>If participants allow their behaviours to be influenced by highly ranked topics, it will influence 'what will be'. In A phase, if there are clusters of original ideas, there is an opportunity to challenge the status quo.</p>
8. Deconstruct system imperatives	<p>"How does OPERA enable participants to develop critical appreciation of social systems that constrain their actions?"</p> <p>Backward looking (accusatory) questions were not encouraged in the OPERA book or app, but there was some discussion of 'How can we overcome...' type questions. These questions are necessarily based on a critique / understanding of the status quo.</p>	<p>This was evident in session 2 (FairShares Conference 2015) where the most highly ranked choice was rooted in a critique of constraining social systems – copyright, patents etc.</p> <p>Responses may themselves deconstruct existing social structures. For example, FairShares was positioned as a good choice "when an alternative model has not worked" and as a system that "minimises the concentration of the power of the rich and powerful".</p>

We had fewer findings on the final part of the cycle as OPERA guidance recommends avoiding questions that are 'backward' looking. However, in fieldwork, we found that statements crafted in the

P phase for the E phase could have implicit critiques of the status quo built into them. The best example of critiquing the status quo comes from the selection of a particular contribution in session 2. In response to the question “When is the FairShares Model at its best?” participants selected the following as their most highly ranked response.

“FairShares is most attractive and useful when it empowers groups of people to create a knowledge commons (a resource plus a community and a set of rules for access and usage)”

Reported to association members via the FairShares Loomio Group, 7th July 2015.

The commitment to a ‘knowledge commons’ lies in the advocacy of Creative Commons to license the creative outputs of members within a FairShares enterprise. This is itself an implicit critique of the inhibiting effects of patents and copyrights. Subsequent FairShares companies in the UK and US, largely retain this commitment (Ridley-Duff, 2016) and expand it. A company called AnyShare Society added OpenSource clauses, and made it more explicit that patents and copyrights can prevent the privatisation of members’ ideas.

Discussion

In our discussion, we consider the number of times OPERA processes unambiguously act as a mechanism (Pawson and Tilley, 1997) that supports one or more aspects of a CAP (see Table 5).

Table 5 – Unambiguous Evidence of OPERA mechanisms influence CAPs (Session 2)

AI Phase	CAP Element (as per Table 1)	Instances of unambiguous evidence (with “maybes” excluded)	Total	N + %
Discover	1 Discover	6	13	32 (61.5%)
	2 Expanding Life World Possibilities	7		
Dream	3 Dream	8	19	
	4 Initiate ‘critical acts’ / narratives	11		
Design	5 Design (Imagination)	5	12	20 (38.5%)
	6 Practice behaviours	7		
Destiny	7 Destiny (innovation)	5	8	
	8 Deconstruct System imperative	3		

OPERA can generate narratives. However, when the AI stages are combined to reflect the 4D cycle, a trend becomes clear. The influence of OPERA was strongest on the first part (Discovery, Dream), and weaker in the second part (Design, Destiny). We observed an approximate 60:40 ratio. Our field notes recorded that “in ‘pairing’, selection of important ideas is effectively a critical act” and that “there are more critical acts in ‘pairing’ than ‘explaining’”. In the context of narrative generation, we reflected on how critical these acts were. Does OPERA promote critical appreciation in the sense advanced by Grant (2014) and Ridley-Duff and Duncan (2015)? Are the participants identifying

Habermasian system imperatives, resisting colonisation of their lifeworlds, or engaging in transforming learning? Participants 'critical acts' were often just *significant* observations and did not involve any detailed deconstruction of the status quo, or identification of hegemonic discourses. However, in session 3, there is some evidence of this, largely prompted by the OPERA question. In response to "How can studying the social solidarity economy revolutionise enterprise education?" the following responses were made:

By making the solidarity economy a necessary (required) component of business and management courses, it ensures that social values and democratic decision-making become central to enterprise education.

Studying the solidarity economy challenges cultural assumptions based on individualism, consumerism and greed...questioning the above can alter a person's world view.

Theme 1 and 3, SE Education Conference, York St John's University, August 2015

OPERA processes *can* stimulate a process to 'challenge cultural assumptions' and critically engage the ideas of 'individualism, consumerism and greed'. Nevertheless, these responses were prompted by the question, rather than the process. Amongst our general observations, we noted:

- The nature of the question is important. The extended discussion of question choices in the OPERA book shows that they can be directed at different parts of the CAP cycle.
- The OPERA process generates more ideas than group brainstorming or a roundtable discussion. The process makes it easier for people to explain their idea to the whole group by allowing them to 'collect their thoughts' in the O and P phases.
- The R phase is appreciative in the same sense that AI is appreciative. All ideas that survive have been positively screened three times (once when they were chosen, once when they were selected by a pair, and finally when they secure votes).
- The R phase could be influenced by other teams - people crowding around the OPERA board and hearing snippets of other team discussions. The facilitator can influence voting criteria. Whilst this would not occur with the online app, it would influence face-to-face working.

We arrived at an understanding that OPERA can ask appreciative questions, but there is no injunction to do so. The key finding is that the selection (ranking) of ideas can be appreciative too, by avoiding processes for 'talking down' ideas. OPERA guidance argues that there is no long-term benefit to a group or organisation if its members' ideas are 'talked down' because the negative experience of humiliation outweighs any positive value from critical debate. Yet it is this very assumption that leaves us less convinced about OPERA's contribution to critical thinking. It is a tenet of critical research that ideas should be tested by those marginalised within a governance system. However, the written guidance suggests that an OPERA process can be followed by a conventional meeting to test ideas *after* they have been selected (Slaen et al., 2014), or further OPERA sessions can test aspects of what has been selected. Its role in critical inquiry, therefore, is limited to establishing promising perceptions for further inquiry, but can be promoted by the question that is asked.

We also arrived at an understanding that the process could be made more robust. For example, the online app asked participants to add text to explain why they have advanced ideas. Participants could also be asked to add text to show the *rationale* behind their ranking choices (voting). This would make the process of thought more explicit. This is important in light of the facilitator's power to steer the discussion in a direction they prefer. In subsequent use of OPERA, we experienced this tension ourselves and realised that bias may be unintentional or deliberate. We had to consciously stop ourselves screening out ideas at the nomination stage (on the basis that they did not answer the question asked), and also had to discipline ourselves not to comment on ideas while they were being explained by participants (to avoid influencing voting). Grant (2006) identified similar issues in appreciative inquiry. She questioned the 'power' of the facilitator to determine what is deemed 'good' or 'positive', and noted their power to steer conversations towards the 'positive'. Even with these limitations, we found the OPERA process mitigated the danger of single individuals taking control (including the facilitator). It is not a technique that a dominant individual or CEO would favour if *control* of a discourse or a decision is the goal.

Conclusions

We conclude by answering our RQ:

'What learning mechanisms are triggered by OPERA, and do they influence the development of CAPs amongst practice-oriented SE professionals?'

The first part of the question 'what learning mechanisms are triggered by OPERA' can be answered by drawing attention to the phases of personal reflection, dialogic exchange, articulation of ideas, the explaining, ranking and arranging of ideas. Different phases engage different learning mechanisms. Personal reflection prevents 'anchoring' and generates a plurality of voices before the P phase begins. The P and R phases call for skills in comparing and evaluating ideas (firstly to decide what to advance to the group, and then by selecting ideas for further consideration). The E phase involves learning how to speak in public and explain ideas clearly. As participants have been primed in the O and P phases, they are more relaxed in the E phase. In the A phase, abstracting skills are developed as groups are invited to draw out the linkages between statements.

The second part of the question 'do they influence the development of CAPs' can be answered by reviewing Tables 1 – 4. We found that mechanisms in OPERA do contribute to aspects of the AI cycle, but have more limited application to *critical* appreciation. In this study, we found OPERA processes to have much more influence on the early part of the AI cycle (Discover, Dream) than the late part (Design, Destiny). The greatest influence was on the 'dream' part of the cycle, perhaps indicating that this is the best way to use OPERA with AI. OPERA is highly 'generative' (Gergen, 2014) on account of the inclusion of the O and P phases of formulating ideas, and can also contribute to discovery (through sharing) and design (through selecting and evaluating).

Whilst this study suggests the weakest contribution is to the Destiny part of the cycle, we still found evidence of long-term impacts (through the longevity of discussion threads created by the FairShares Association in session 1 and articulation of the value of an ‘intellectual commons’ that was transferred into practice after session 2). In terms of generating critical awareness of hegemonic system controls and transformative/emancipatory intent, we assess that this depends more on the question than the process.

Our conclusion, therefore, is that OPERA offers a new way to be appreciative (through positive idea selection). It is a useful addition to the methods that can be deployed during AI. We recommend further research to see whether different opening questions can further enhance its contribution to CAPs. For example, by asking deficit-based questions (e.g. “What problems do we have doing / operating in x?”), descriptive questions (e.g. “What factors influence x?”) and purpose setting questions? (e.g. “Why do we want to lead on this issue?”), there would be more focus on deconstructing the status quo alongside positive selection of preferred critiques. The idea of running two consecutive OPERA sessions (Slaen et al., 2014), the first with a critical question (CI), the second with an appreciative question (AI), would catalyse more robust CAPs.

To conclude, OPERA introduces new behaviours that enable group members to rapidly acquire ‘know-how’ and develop local knowledge. As a result, OPERA can advance the participatory management and stakeholder governance desired by SE managers. In terms of contributing to the core competencies identified by Moreau and Mertens (2013), we suggest the value of OPERA resides in the mechanisms that stimulate generativity. Facilitating OPERA processes could be seen as a core competence through which managers nurture the development of the local knowledge, skills and behaviours considered important to the achievement of social impact.

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Appendix A

The Appreciative Inquiry Cycle – Cooperrider and Witney (2000)



Appendix B – Statements published after OPERA sessions

Session 3 – SE Education Conference

OPERA Question: **How can studying the social solidarity economy revolutionise enterprise education?**

Participant Responses:

1) Studying the solidarity economy will impact on enterprise education curricula:

By making the solidarity economy a necessary (required) component of business and management courses, it ensures that social values and democratic decision-making become central to enterprise education.

2) Studying the solidarity economy can be linked to new work placement opportunities:

By understanding the multiple perspectives of participants in the solidarity economy, more effective integration of its social and economic aspects can be achieved. Engagement will enhance knowledge of the relationship between the theory and practice of social entrepreneurship, and build bridges between the institutions of organised labour, social entrepreneurship and cooperative development.

3) Studying the solidarity economy challenges cultural assumptions based on individualism, consumerism and greed:

Questioning the above can alter a person's world view. If started in primary school education (where students are naturally cooperative), it can become embedded in their outlook. As their education progresses, it can offer a wider range of opportunities and career paths that will result in more people participating in the sector.

Session 4 – Co-operative Education Conference

OPERA Question: **When is co-operative education at its best?**

Participant Responses:

1) ...when it takes place in a comfortable environment:

Co-operative educators should prepare time and space so that their learning environments are accessible. A comfortable environment is enhanced by talking to learners about their cultural background and understanding their preferred learning styles. Sessions can deploy pedagogic techniques that break down barriers between members to promote joint discovery and challenge. By doing so, learning will become a collaborative and social experience.

2) ...when it is based on a philosophy of lifelong learning:

Co-operative education is a continuous learning process strengthened by critical reflection on existing knowledge to promote alternative ways of explaining a problem. It values scepticism and inquiry into alternatives using creative research techniques. It can be promoted by engagement with written, visual and social media both inside and outside the classroom.

3) ...when practical collaboration is underpinned by values and principles:

Learning improves when there is discussion of the values and principles that underpin a topic or course of action. Learning becomes more life affirming when it is guided by purposes and ethics. Learning improves when there is a commitment to learning by doing in non-hierarchical (equal) relationships tackling real world issues through practical collaboration.