



DOCTORATE IN PROFESSIONAL PRACTITIONER

BMPF7200

RESEARCH PROPOSAL



Date:
APRIL 11 2025

Using the headings listed for the written proposal, this presentation of no more than 20 minutes is aimed at an academic audience. It is designed to give them an overview of my research proposal and to help me defend it.

PRESENTED BY:

HELEN SANSON



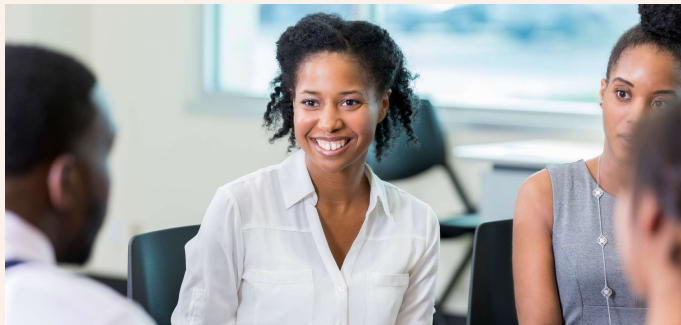
Good afternoon. Before I start my presentation, I would like to give you a brief introduction to my professional practice. I am an academic, consultant and coach who specialises in systems thinking which is a learning approach to understand complex problems. I have worked in the field since 2021, but my background stretches far back to the 90s when I studied Communications at A-level and for my first degree. Currently, I am heavily involved in the L7 systems thinking apprenticeship and Masters courses at the Open and Birmingham universities, JGA and Advance HE working on the delivery and assessments.



PROPOSED TITLE

RESEARCH PROPOSAL

**DEVELOPING SYSTEMS THINKING PRACTITIONER IDENTITY
THROUGH PRACTICE DIALOGUES:
USING QUALITATIVE MIXED METHODS TO IMPROVE
PRACTITIONER DEFINITION**



The title of my research reflects my profession- Developing Systems Thinking Practitioner Identity Through Practice Dialogues: Using qualitative mixed methods to improve practitioner definition

BACKGROUND AND
CONTEXT



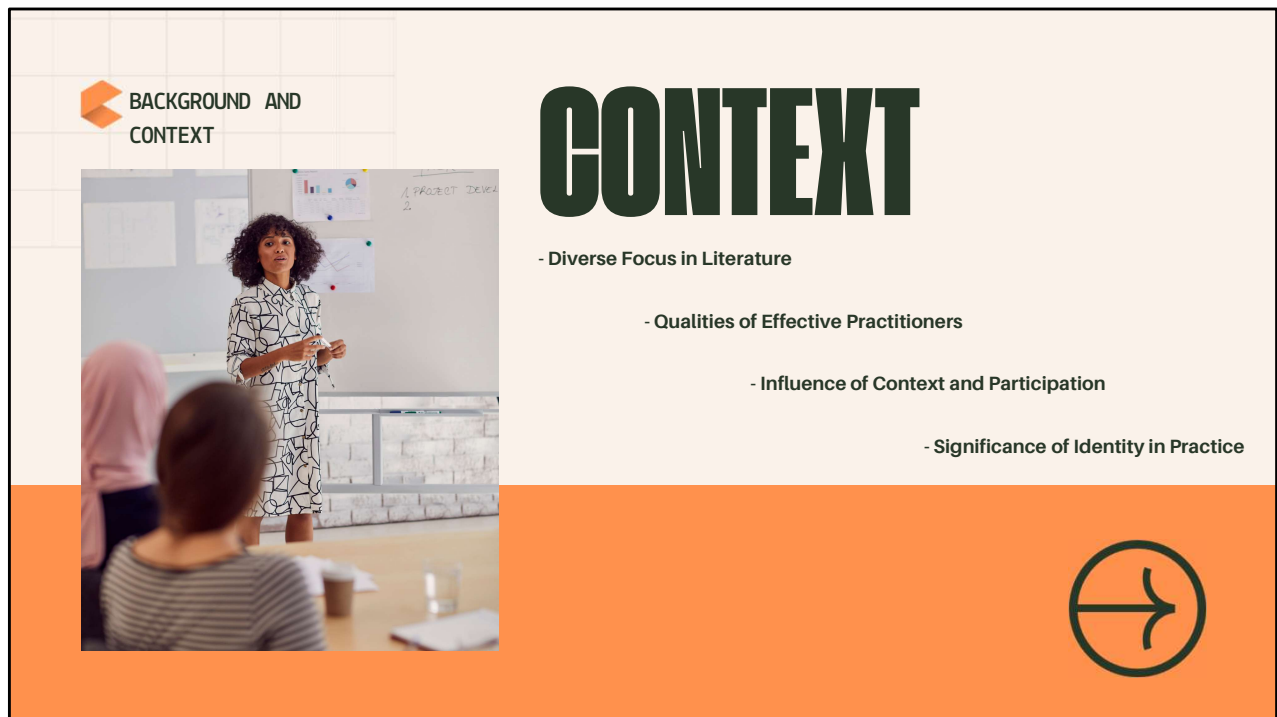
BACKGROUND

- Rise of Practitioner Courses
- Routine and Standardisation Risk
- Diverse Traditions in Practice
- Lack of Practitioner Clarity



With the increase in its popularity, systems thinking has seen the rise of practitioner courses to professionalize the practice. However, with this comes two issues. Firstly, as it is a creative practice, it requires a practitioner to think expansively. Yet, the rise in courses runs the risk of making a practitioner's actions routine, standard, and procedural, which could inadvertently lead to reductive, critical and problem-thinking skills, which is the antithesis. Secondly, there are various traditions and ways of practicing; therefore, who decides what constitutes a practitioner? In the case

of systems thinking, the most well-known courses, such as the apprenticeship, Theory U, or the Masters, have been set up by those with a long-standing presence, yet there is no uniformity amongst them. What is common is that they explain various “practices” that constitute systems thinking practice but not what being a systems thinking practitioner is.



Recently, three books have explored the theme of practitioner identity in systems thinking. The most recognized work by Jackson (2024) emphasizes theory and academic applications rather than the practitioner's role. In contrast, Roberts (2023) offers a personal perspective, highlighting the qualities needed to be an effective practitioner, such as being a good communicator, empathy, and an active listener. Montalion (2024) occupies a middle ground but fails to delve into the professional paradigms of being a practitioner. The essence of being a practitioner is intertwined with the context of participatory

interactions, where the relationship between participation and context impacts problem framing and perspectives. This dynamic influences how knowledge is acquired, the occurrence of emergent learning, and the resulting actions taken. Therefore, understanding the significance of identity in terms of problem holders, practitioners, and participants is crucial in systems thinking practice, particularly within the time and space of these interactions, as they can significantly affect the tangible impacts generated.



BACKGROUND AND
CONTEXT

RATIONALE

- Alignment of Concepts
- Establishment of Practitioner Boundaries
- Visibility of Practice and Practitioner
- Defining Practitioner Identity



The rationale is to explore how systems approaches, social learning, personal narrative and context align through the lens of systems thinking practice which is crucial for establishing the clear boundaries of a practitioner and the practice itself. However, alignment here does not mean mutual accord; it means being able to set out the distinct boundaries of a practitioner that are clear and understood by all before any social learning through systems thinking starts so that the similarities and differences in the relationship between practice and practitioner are made visible rather than seen as a

joint enterprise and how the identity of a practitioner is harmonised through practice. The research's insights will be used to define a systems thinking practitioner's identity and outline the essential qualities of a practitioner for effective practice.

RESEARCH AIMS

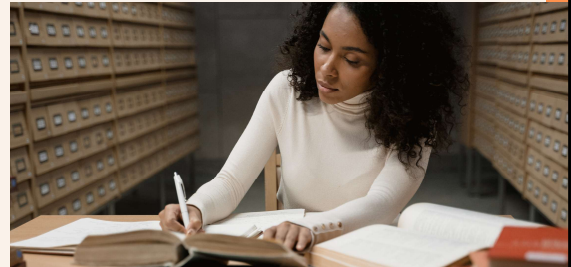
Investigate Knowledge Engagement

Explore Problem Definition Context



Define a Systems Thinking Practitioner

Evaluate Relational Positions



This research aims to explore the dynamics of systems thinking practice to define what a system thinking practitioner's identity is to help those working to develop prospective practitioners by examining the relational positions between individual and collective identity and investigating how a practitioner interacts and engages with lived and theoretical knowledge in practice. It explores the terms under which the practitioner determines the problem by examining the boundary around the socio-political context of issues when placed relationally to the micro-context of the practitioner

and/or by macro-context of the concern.

 AIMS AND OBJECTIVES

RESEARCH OBJECTIVES

Analyse Contextual Influences on Identity

Assess the Ethical Balance of Knowledge

Evaluate the Inclusion and Exclusion of Viewpoints

Examine Decision Making and Context



To achieve this, the research will:

- Assess the ethical implications for practitioners when including and excluding viewpoints in their practice and how they feel about situating knowledge and learning either centrally or marginally.
- Investigate how the problem holder or practitioner's decision-making is affected by context and

subjectivity and how they view the significance of emergent learning, especially if the participants' narratives challenge their established knowledge.

- Explore how the problem holder, practitioner and participants make sense and meaning within the practice and whether it's situated and centred as part of their identities in that time and space.

- Analyse how a practitioner ethically balances their established knowledge and alternative perspectives about problems to transform learning into an aligned, cohesive and integrated narrative when they have shaped the mode of engagement.

INDICATIVE REVIEW OF
LITERATURE

LITERATURE REVIEW





"....the use of literature as a tool to name and frame problems (versus traditional identifications of gaps or mastering of theory). Literature encompasses scholarly and professional literature, are used to better understand the roots and history of problems of practice from both academic and practitioner viewpoints. The literature also helps to clarify the inquiry questions." *Carnegie Project on the Education Doctorate*

This overview of my indicative review of literature is based on the Carnegie Project's style, i.e. a brief yet comprehensive review of blended academic, practical and professional knowledge to understand a practice problem through an inquiry that may or may not make change. It is similar to a narrative literature review by offering a subjective and interpretive synthesised summary and critique of a broad range of studies so that multiple perspectives can shape the research. As such, this review aims to understand why it is essential to define what a practitioner is when developing systems thinking

practice.

INDICATIVE REVIEW OF
LITERATURE

PRACTITIONER IDENTITY



The 'relatively stable and enduring constellation of attributes, values, motives, and experiences in terms of which people define themselves in a professional role.' Ibarra (1999)

"How an individual conceives of him or herself as ... whereas professionalism involves being and displaying the behaviour of a professional" Wilson et al. (2013)



Systems Thinking is typically seen through the lens of practice, i.e. as a learning approach for understanding complex problems, mainly in soft systems such as organisational operations or services involving people but increasingly it is being used to tackle social issues such as climate change, obesity or migration. However, it is also used when examining the complexity of hard systems such as manufacturing, software, or engineering. Regardless of the use, the books, articles, and research focus on systems thinking practices, such as applying the approaches or models, but rarely on

who or what a practitioner is and how to be one. Understanding a practitioner's identity is vital due to the increase in professionalisation.

Practitioner contexts can be coercive, stressful and unethical, but systems thinking writing focuses on the practice, not the practitioner. Ibarra (1999) sees identity as the 'relatively stable and enduring constellation of attributes, values, motives, and experiences in terms of which people define themselves in a professional role.' However, despite the recent adoption through the apprenticeship that a systems thinking practitioner is an occupation, thus a professional role, it is more typically a practice entwined within a profession, making for a tangled mix of practitioner, professional identity and professionalism. So, there is "how an individual conceives of him or herself ... whereas professionalism involves being and displaying the behaviour of a professional" Wilson et al. (2013) and how a person's multitude of identities whilst at work affects practice, practitioner and professional identity and professionalism (Elvey et al., 2013).

PLACED ON A HIGH PEDESTAL



"The ability of academic consultants to give an unbiased account is prejudiced by their intellectual and emotional engagement in the events studied." Ormerod (1999)

I do tend to think that systems thinking is still seen as the preserve of certain experts or certain people who've used that approach rather than it being something that all...should be working with routinely" Nguyen (2023)



The focus on a practitioner's identity in systems thinking is often limited, as most discussions are led by academic practitioners who integrate consulting into their scholarly work. This creates a bias in their understanding of practice, as noted by Ormerod (1999), who emphasizes the impact of their emotional engagement. Academic perspectives dominate the discourse, leading to a narrow definition of what it means to be a practitioner, which is problematic according to Midgely (2023). This exclusivity and perceived complexity contribute to the slow adoption of systems thinking, as

highlighted by Armson (2008). To broaden its appeal, this research aims to demystify practitioner identity and make it accessible to a wider audience beyond experts, responding to concerns like those expressed by Nguyen (2023) about its perception as an elite discipline rather than a routine practice for all.



INDICATIVE REVIEW OF
LITERATURE

PRACTICE VS PRACTITIONER



"the emotional challenge inherent in breaking through to a style of thinking that we would recognise as Systems Thinking, stimulated by the learner's own need to solve a problem. We also recognise...the underlying emotions that enable or disable new ways of knowing." Armson (2008)

"the field trials...provided an example of the evolution of a strand of practice", which "translates theory into action", however "the difficulty of translating theory into action should not be underestimated." Omerod (1999)



Recent discussions around systems thinking have shifted from solely focusing on practice to exploring the qualities of effective practitioners. Despite a growing interest in the professionalization of systems thinking, there remains a lack of clarity about what constitutes a good practitioner beyond basic skills like active listening and facilitation. Armson (2008) highlights the emotional challenges faced in adopting a systems thinking perspective, emphasizing the importance of personal and interpersonal skills. The field often overlooks the nuanced identity of practitioners, conflating

academic knowledge with practical ability. Lazlo (2012) distinguishes between those who can articulate systems concepts and those who intuitively grasp them. This has contributed to an academic bias in the literature, as Omerod (1999) suggests that practice is often viewed through a theoretical lens. The research has to transcend this academic narrowness and better define the identity and skills required to be an effective systems thinking practitioner.

INDICATIVE REVIEW OF
LITERATURE

THE PRACTITIONER IN PRACTICE



"systems practitioners have a responsibility to create space for, and help support the framing of, better systems, rather than perpetuating ...God-given realities" Reynolds (2011)

"...embodies all three aspects of systems thinking in practice: understanding relationships, surfacing contrasting perspectives and exploring ethical and power relations." Reynolds, (2011)



The literature highlights a gap in addressing practitioner identity within the context of systems thinking. Oligia (1988, cited in Reynolds, 2011) notes that practitioners often overlook social structural factors shaping their worldviews while adhering to ontological realism, which hampers a deeper understanding of what it means to be a practitioner. Scharmer (2014) emphasises that the success of interventions depends on the "interior condition" of the intervenor, suggesting that practitioners' identities significantly influence their approaches. However, the focus remains primarily

on practice, overshadowing the practitioner's identity. Reynolds (2011) argues for a balanced exploration of practitioner narratives to enrich understanding, urging academics to avoid presenting their perspectives as universally "real." By examining the relationships and attachments that shape practitioners, this research can provide a comprehensive view of how ethical, relational, and power dynamics are integrated into their identity.



INDICATIVE REVIEW OF
LITERATURE

PRACTITIONER DEFINED

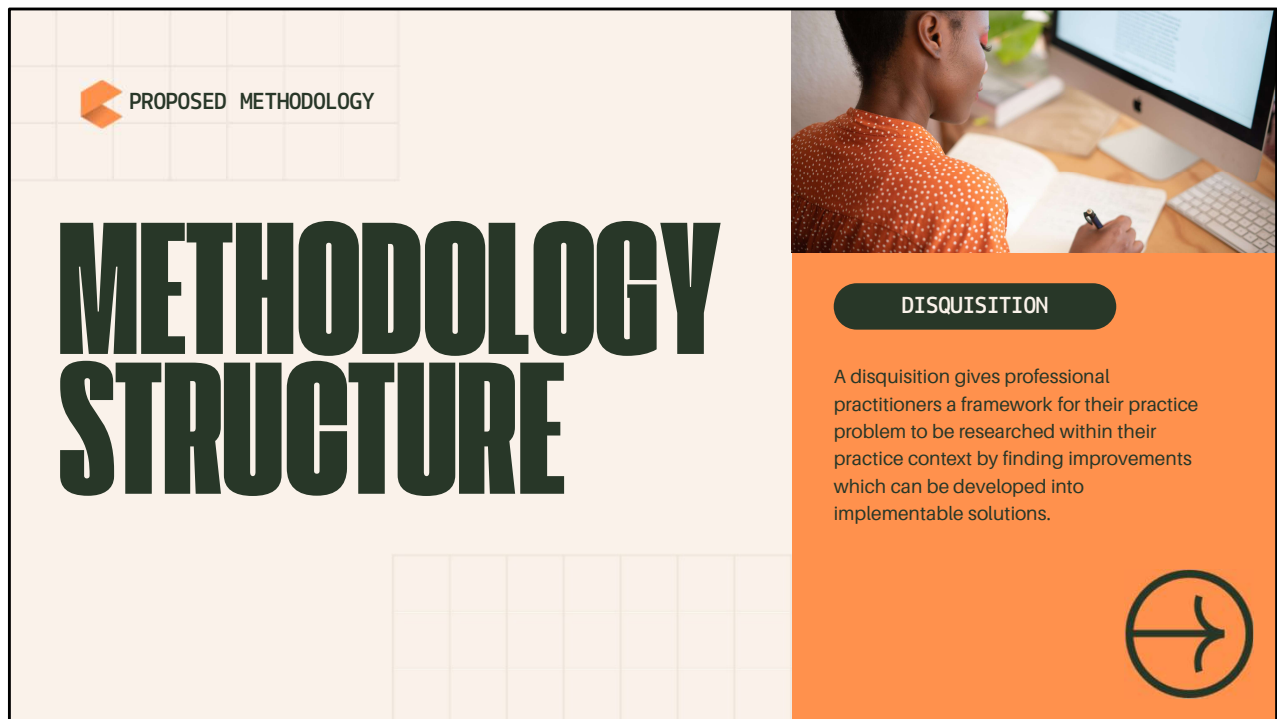


"Nonlinear approaches always begin with observation—paying attention to how things work." Monalio (2024)

,"there will be readers hoping for more specific guidance...please remember <it's> only meant to provide a general orientation to an intervention..." Jackson (2024)

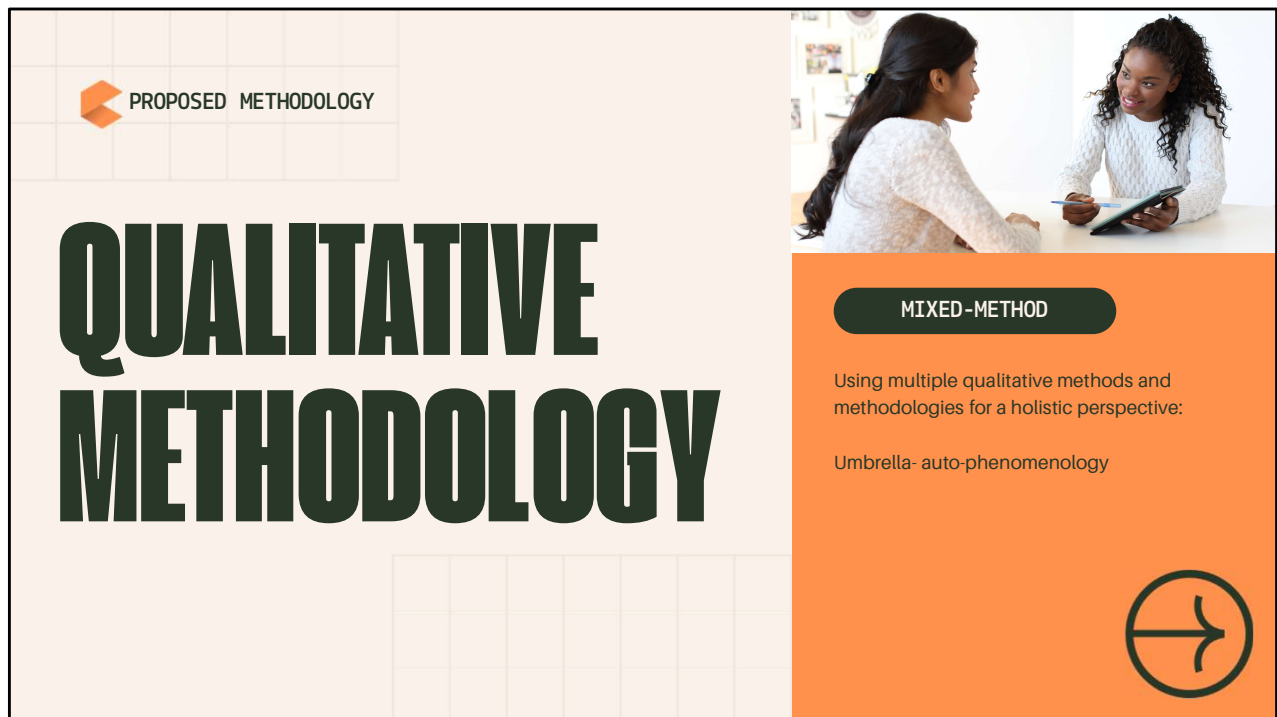


The discourse on practitioners in systems thinking primarily comes from academic practitioners, focusing on practice rather than the practitioner's identity. This leads to vague guidance on becoming a practitioner, as it often intertwines practice with practitioner identity, neglecting their distinctiveness. The research argues that understanding these differences is crucial for clarifying the essence of being a practitioner. Emotional challenges, such as the distress from confronting complex social issues like obesity and racism, further complicate practitioner identity, as noted by Roberts (2023). The need for emotional resilience and self-care strategies is emphasized, but underlying reasons for emotional strain remain unexplored. Hence, the research calls for a deeper investigation into the relationship between a practitioner's history, identity, and emotional influences, which all play a crucial role in decision-making and the enactment of systems thinking practice.



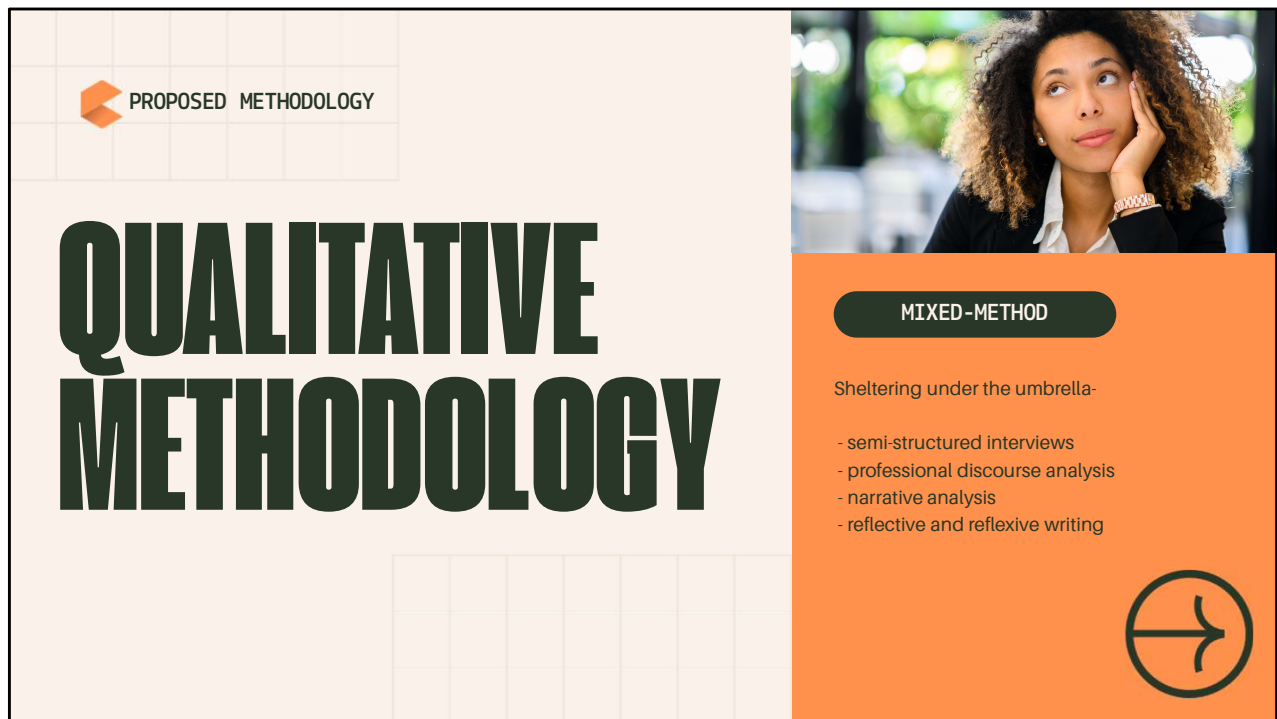
My inquiry into doctoral professional practice-based research has informed my proposed methodology. Two methods resonated; one focuses on the structure of the final dissertation, and the other on the methodology. The proposed structure is a disquisition, a theory-informed dissertation-in-practice model from the Carnegie Project that focuses on various writing methods for professional practice. A disquisition is a formal way for practitioners to explore and solve a significant practice problem by applying research to improve the issue.

The researcher plays two parts- firstly, as the scholar who identifies, describes, addresses and analyses in depth what improvements are required, such as methods, strategies, toolkits, etc., to bring about change, and secondly, as the practitioner who assesses if the change will bring improvements and evaluates its effectiveness. This model helps address identity and ethics in practice by making a significant or noticeable positive change or impact towards an objective. This approach seems logical because the practitioner needs to believe that stakeholders within their practice are affected by the problem so they can define, investigate and improve it. Also, it requires the practitioner to develop, frame and implement an intervention that makes a change, so a mixed method is proposed to diagnose, evaluate, and improve the problem.



In studies, “mixed methods” often refers to combining quantitative and qualitative, i.e. “inter-paradigm” research. However, another definition of “mixed methods” is when the study combines two different quantitative or qualitative methods, i.e. “intra-paradigm” and within the overarching paradigm, various methods or methodologies can be used to help analyse and develop the research in more detail. In the case of this study, a qualitative intra-paradigm approach will be used to explore and examine practitioner practice, behaviour, and identity.

The overarching methodology for the study is auto-phenomenology (Gruppette, 2004), which is an autobiographical type of research that mixes autoethnography- a qualitative methodology which acknowledges my role and identity as the researcher, systems thinking practitioner and educator by reflecting, explaining and connecting them to the various aspects of practice that will be studied through my narrative. And Phenomenology, which is a philosophical study, movement, qualitative method and methodology depending on context. I will use it to research the lived experiences of practitioners engaged in systems thinking practice allowing me, as the researcher, to appreciate their perspectives about being a practitioner through their narratives. The mixing of the two paradigms will allow me, as the researcher, practitioner and educator, to be the primary lens to explore what being a practitioner is whilst “putting myself into the shoes” of other practitioners' experiences so a more comprehensive study can be undertaken.



Other qualitative approaches that will be employed are:

- Semi-structured interviews with students and other practitioners about being systems-thinking practitioners
- professional discourse analysis to examine the relationship between systems thinking practice, practitioner identity and boundaries, socio-political

structures, creativity and conformity and systems thinking discourse

- narrative analysis of the practitioner's experiences and perspectives through their interviews by studying the construction of the meaning of being a practitioner

- Reflective and reflexive writing examining me and others being practitioners to explore and interpret knowledge and experience through different lenses gained contextually in practice situations and through research to achieve insights, evaluate and develop actions



All university researchers must address ethical considerations as a mandatory part of any proposal. As I am an insider researcher with links to several organisations and groups, each with specific ethical lenses the anticipated risks section poses the most significant challenge. This is because, as a practitioner, researcher and educator, my positionality and situatedness are such that my ethical perspective will be derived from all three contexts. Therefore, my explicit personal, work and research ethical perspectives will be integrated within the study in addition to any implicit ones, such

as policies, processes or procedures that condition my contexts yet are unseen. Thus, there needs to be an awareness of my practitioner, student and worker contexts from a societal and a personal lens, which will evolve throughout the research rather than from just “risks” that reflect objectivity, e.g. health and safety, GDPR, conflicts of interest etc.



ETHICAL CONSIDERATIONS



Personal Investment and
Bias

ETHICS CONSIDERED



As I will be the focus of the study as educator and practitioner through lived experience and personal reflections and the researcher of the topic, both identities are interdependent and interconnected. This means I must be aware of my positioning because I need two different gazes. As such, I must make my position and situatedness clear from the outset, and throughout the study so that for clarity, the nuanced ethical divide between the two identities is maintained to avoid confusion. Above all, this needs to be outlined to ensure that my biases do not control the research or narrative;

otherwise, the research may become too subjective instead of objective. This threat is all the more credible because I have a personal investment in the practice and study. Therefore, I run the risk of not investigating some aspects by taking them for granted or ignoring them entirely, so I have to keep checks and balances in place, such as reviewing, negotiating and reflecting upon my position and situation for the duration of the research and being transparent about them.



Playing It Safe To Keep
Me Safe

ETHICS CONSIDERED



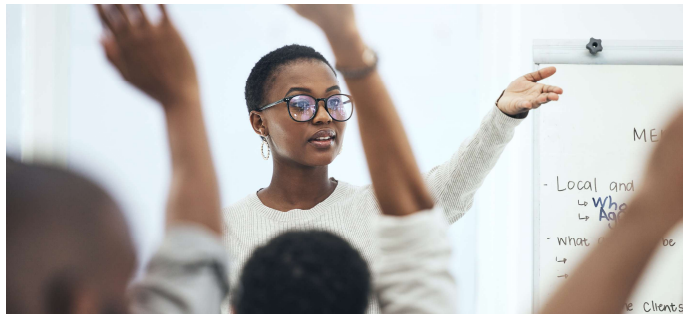
As I interview students and practitioners, I must consider and manage my preexisting relationships. In some cases, I will be their educator, so there will be a power imbalance, and in others, I will be their colleague, so there might be too much familiarity. In either case, the relationship between them and me will be complex. I will need to ensure that my biases do not dominate and that they do not just give me the narratives they think I want to hear. Additionally, I need to avoid the risk of “playing it safe” by inviting practitioners to interview who are more likely to confirm my biases; however, at the same time, I

need to consider my psychological safety as my identity is complex as it also intersects race, sex, class and within my work based practice these aspects of it have caused me harm. Yet, because of this, I have developed particular perspectives about systems thinking practice, which are a blessing and a curse because they could influence my research.



RESEARCH PROPOSAL

Any Questions?



That's is my overview of my research proposal and my defensive of it.



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