Tactical enacting: A grounded theory

A thesis presented in partial fulfilment of the requirements

for the degree of

Doctor of Education

at Massey University, Manawatū, New Zealand.

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2016

Abstract

This research uses classic grounded theory methodology to produce a grounded theory of **tactical enacting.** Forty two participants were drawn from the population of learning advisors working in a variety of tertiary education organisations in New Zealand. Data consisted of field notes and transcripts from observations, interviews and a group workshop/discussion and were analysed using all procedures that comprise classic grounded theory methodology.

The thesis of this thesis is that learning advisors express a concern for role performance and continually resolve that concern through **tactical enacting.** In **tactical enacting**, learning advisors are working tactically towards a variety of ends. These ends include a performance identity and a role critical to organisational agendas. A role critical to organisational agendas is one which makes a significant contribution to student success outcomes and organisational performance. Making a strong contribution to student success and organisational performance helps learning advisors construct the desired professional identity for themselves and establish their role as valuable in the eyes of others and the organisation. **Tactical enacting** means advisors perform their role tactically in order to meet their own professional standards as well as the needs and expectations of students and the organisation and to help secure their place within tertiary education. However, in **tactical enacting,** learning advisors constitute themselves as the performing subject, subject to and subjecting themselves to the performativity discourse of the contemporary tertiary education organisation. At the same time, in **tactical enacting**, learning advisors constitute themselves as the ethical subject in an effort not to be governed by performativity alone and to enable them to meet organisational, student and their own expectations of how they should behave.

This research contributes to knowledge in three main areas. Firstly, to knowledge and practice in relation to professional roles and organisations; specifically, the learning advisor role in the contemporary tertiary education organisation in New Zealand. Secondly, to research; specifically, to the scholarship of learning advising, and, lastly, to research method; specifically, to classic grounded theory methodology, and to an

approach that applies a Foucauldian analytical framework to a discussion of an emergent grounded theory.

Acknowledgements

My thanks and appreciation go to my principal supervisor Nick Zepke who has supported and challenged me from the beginning to the end of this research and to my other supervisors, Seth Brown, Linda Leach and Clare Mariskind, who have done so for various stages of it. Collectively, their enabling approach to the supervision process and their care, critique, questioning, and always thoughtful and thought-provoking responses to my writing, has helped me complete the research and writing with the rigour expected of doctoral researchers.

To all the learning advisors who so willingly gave their time to speak and write to me about their experiences. Their interest in and commitment to this project made it possible.

To my family, friends and colleagues who maintained enthusiastic interest in my progress and cheered me along.

To Massey University for awarding me a Doctoral Completion Bursary which allowed me to take leave from my job and work full-time on putting the final touches to the thesis.

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Chapter one

Introduction to the research

Introduction

To introduce the research, this chapter describes the background to the study, explains the learning advisor role and presents the research problem. The aim and purpose of the research is also set out along with justification for it and a comment on its potential significance is provided. The chapter then gives a brief account of the research approach before concluding with an outline of the thesis structure.

Background to the research

I am the manager of a student learning centre in a New Zealand polytechnic with a deep interest in, and considerable knowledge and experience of, tertiary education and of the changing environment that is the reality for staff and students in New Zealand tertiary education organisations (TEOs) today. The changing environment of tertiary education brings a variety of pressures to bear on my professional role, on my practice and on the practice of the learning advisors for whom I am responsible. I also hold concerns about the potential of the contemporary tertiary education environment to influence students' expectations about learning and support and alter the nature of learning advising practice in ways that may not be beneficial to students or learning advisors. Thus, this research was motivated by my desire to understand more intimately the everyday reality for learning advisors working in the contemporary TEO in New Zealand and their practice and behaviour.

As stated above, the tertiary education environment in New Zealand, and internationally, is an ever-changing one characterised by increasing regulation and an emphasis on performance measures, quality assurance and audits (Marginson, 2013). The associated effects of decreasing resources and intensifying workloads present numerous challenges for education professionals, including learning advisors (Bentley,

McLeod & Teo, 2014). Informal conversations with learning advisors working in TEOs had alerted me to some of the ongoing challenges they were facing in the current environment and heightened my interest in investigating further in order to better understand the advisor role, position and influence within the contemporary TEO in New Zealand. Likewise, informal conversations with academic staff[1] in TEOs revealed equivalent concerns as well as others about identity, traditional academic values and the increasingly corporate TEO (Weinberg & Graham-Smith, 2012). I began to wonder how this environment of constant change, increasing regulation and culture of performativity (Ball, 2012) impacts on how learning advisors carry out their work. What are advisors' concerns? What are their responses?

The learning advisor role

Learning advisor is the term used in New Zealand for professionals working in academic advisory roles in TEOs (Association of Tertiary Learning Advisors of Aotearoa New Zealand [ATLAANZ], n.d.). While the disciplinary role is termed learning advisor, the names learning development lecturer, learning consultant, learning skills tutor and academic development lecturer are amongst those used in different organisational contexts. This role has equivalents in other countries; for example, academic language and learning educators in Australia, learning developers in the United Kingdom and learning specialists in Canada. Learning advisors in New Zealand are highly qualified and experienced professionals with 92 per cent holding a bachelor's degree or higher and 60 per cent holding postgraduate qualifications (Cameron & Catt, 2013). Advisors have teaching qualifications and other qualifications relevant to the specific services they provide; for example, a Teachers of English to Speakers of Other Languages (TESOL) qualification, or a research degree when working with postgraduate students (ATLAANZ, 2012).

Learning advising in New Zealand, as in other countries such as Australia, has its roots in psychological counselling (Brailsford, 2011; Chanock, 2011). The separation of academic learning advising from the counselling model in New Zealand can be traced

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[1] Academic staff is the term used throughout the thesis to refer to teaching staff in TEOs.

back to the 1980s when the University of Auckland established a student learning unit and employed learning advisors (Brailsford, 2011). The establishment of that unit and of those which followed in other TEOs was in response to government moves to widen domestic participation in tertiary education and manage the increasing number of international student enrolments. The widening participation agenda encouraged large numbers of students from a variety of backgrounds and with varying levels of preparedness to enrol in tertiary education and the 'non-traditional' student was born (Stirling & Percy, 2005). Non-traditional students were considered to be problematic, but their problems could be addressed through remediation (Chanock, 2011; Zeegers, 2004). Because learning advising had its roots in a counselling model and was viewed as remedial, the link between problem students, remediation and learning advising was established (Stirling & Percy, 2005). The learning advising profession rejects the remedial tag, asserting all students are challenged by the requirements of tertiary study to some extent and need to develop the skills necessary to move through education successfully. In order to overcome the view of the learning advisor role as a remedial one, the profession works consistently to strengthen its reputation for teaching students the academic skills needed for independent and successful learning and positions its work as integral to teaching, learning and student success in tertiary education (Crozier, 2007; Manolo, Marshall & Fraser, 2009).

All New Zealand universities, institutes of technology and polytechnics (ITPs) and many private training establishments (PTEs) employ learning advisors in centralised and faculty-based positions to provide academic services to a significant proportion of the tertiary student population. Services are provided to around 15–20 per cent of university students and 50 per cent of ITP students (Manolo et al., 2009) and help "bridge the gap between the skills students bring to tertiary education and the skills required for successful participation" (Morris, 2008, p. 87). Learning advisor services include "academic skills development (academic writing, study skills, oral presentation skills, mathematics & statistics, ICT, library and information skills); personal skills and pastoral support; orientation programmes; transition programmes; peer support programmes; testing & assessment; staff/tutor development" (ATLAANZ, 2012, p. 4).

Learning advisor services are delivered through one-to-one consultations, small and large group work and online. Many learning advisors also provide research student supervision services, serve on academic and other organisational committees, and are active researchers (ATLAANZ, 2012). Learning advisors believe their role makes a significant contribution to student success outcomes and to the achievement of organisational goals (Fraser, Manolo & Marshall, 2010).

Learning advisors are represented by the Association of Tertiary Learning Advisors Aotearoa New Zealand (ATLAANZ), a professional association formed in 2000 and incorporated in 2003. ATLAANZ aims to:

> Facilitate communication, networking, exchange of ideas, and sharing of good practice amongst professionals working in learning advisory roles within tertiary institutions.

> Support the professional development, and promote the professional status of members.

> Disseminate research findings, publications, and other materials that are relevant and useful to members. (ATLAANZ, n.d., para. 2)

ATLAANZ has held an annual conference since 2000, published conference proceedings from 2006 and launched its professional journal in 2015. In 2012 a professional practice document was adopted by ATLAANZ which serves learning advisor interests by "explaining our profession to outsiders and in doing so safeguarding and promoting our status within our own institutions and the tertiary education sector as a whole" (ATLAANZ, 2012, p. 1). In 2014, in a further move towards cementing their professional status, ATLAANZ signed a memorandum of agreement with its equivalent professional associations in Australia, the United Kingdom and Canada forming the International Consortium for Academic Language and Learning Development.

The research problem

This research seeks to discover what is going on for learning advisors working in TEOs in New Zealand and to learn something new about the topic. Anecdotal evidence suggests the learning advisor role is poorly understood and that learning advisors are vulnerable in the face of tertiary education change and decreasing resources (Cage, 2013; Carter, 2010). Therefore, this research asks: What is actually happening for learning advisors? What is their main concern and how do they resolve that concern? Classic grounded theory offers an ideal methodology for uncovering what is going on for learning advisors for two main reasons. Firstly, grounded theory explains what is really happening for people rather than describing what should be happening (McCallin, 2003), and, secondly, grounded theory assumes people lead complex lives and so are resolving important problems all the time (Glaser, 1978). Classic grounded theory provides a theoretical explanation of how people solve those problems and, therefore, holds promise for producing a clear picture of what actually is (Simmons, 2011).

A clear picture of what is via a theoretical explanation is keenly sought by learning advisors. Stevenson and Kokkinn (2007) claim that because learning advising is under-theorised, research into practice must have as its purpose the development of theory to explain and guide it. Yet while there is a growing body of published literature in the field which contributes to strengthening both the practice and professionalisation of learning advising, very little attempts to theorise it. Theorising is acknowledged as essential research work; theory will give learning advisers "lenses through which we can see [learning] advising more clearly" (Hagen, 2008, p. 16).

Aim and purpose of the research

This research aims to use classic grounded theory to discover the main concern of learning advisors working in TEOs in New Zealand and to explain how they continually resolve that concern. The research purpose is to develop a grounded theory that explains learning advisor behaviour.

Specifically, the research objectives are:

1. To explore individual experiences and perceptions of the learning advisor role and develop a conceptual understanding of the drivers of learning advisor behaviour.

2. To build a grounded theory of learning advisor behaviour in the contemporary TEO.

While the two objectives described above are those identified at the outset of the research, a third revealed itself as the study progressed; thus the third research objective is:

3. To identify organisational drivers of learning advisor behaviour.

Justification for the research

While reports of learning advising practice appear in the professional literature, there are few which consider contextual influences on learning advisor practice and behaviour and even fewer which offer theoretical explanations. In the context of persistent organisational change, performativity culture and an increasing sense of vulnerability amongst advisors, understanding and theorising how learning advisors process and resolve concerns seems apposite. A theoretical explanation of learning advisor behaviour is likely to be applied by learning advisors in their practice because a theory "tends to engender a readiness to use it, for it sharpens their sensitivity to the problems they face and gives them an image of how they can potentially make matters better" (Glaser & Strauss, 1967, p. 240).

Potential significance of the research

Understanding what is really going on for learning advisors working in TEOs today is a key to understanding the learning advisor role and the main drivers of advisor behaviour. The findings of this research may help learning advisors understand their

role and develop action strategies to help exert a level of control over it (Glaser & Strauss, 1967). This research adds to existing knowledge about learning advisors working in TEOs in New Zealand. In doing so, the research is potentially significant because little is understood about how the organisational context influences learning advisor practice and behaviour and whether or not advisors are able to act to reconcile organisational values and ethos with their own professional ones. Through the achievement of its aims and objectives, this research contributes to an understanding of the drivers of learning advisor behaviour. A better understanding of the drivers of their behaviour has the potential to improve learning advisor practice and enable them to meet their own professional standards as well as the needs and expectations of students and the organisation. This research contributes to practice by raising advisor awareness of the influences at play in the contemporary TEO, how those influences impact on the way advisors perform their role, and of the opportunities the situation offers.

The research approach

This research uses classic grounded theory methodology (Glaser & Strauss, 1967) to develop the grounded theory of **tactical enacting** and then discusses the grounded theory via the application of an analytical framework related to Foucault's (1991) concept of governmentality. Applying Foucault's concept of governmentality to a discussion of the grounded theory helps illuminate the discursive forces operating in TEOs in New Zealand and produces a more nuanced explanation of learning advisor behaviour than does the grounded theory on its own. A more nuanced explanation has the potential to strengthen the contribution this research makes to practice and research.

Structure of the thesis

This thesis comprises six chapters as follows:

In the first chapter the research is introduced via a depiction of the background, an explanation of the learning advisor role and a description of the research problem. The

chapter sets out the aims and purpose of the research, provides justification for it and comments on its potential significance before concluding with an account of the research approach.

Chapter two orientates the reader to the field of study by way of a contextual overview which considers the contemporary tertiary education environment in New Zealand and the learning advisor role within it. Specifically, the chapter explains the tertiary education system in New Zealand, discusses the nature of the current tertiary education environment and examines the impact of that environment on how learning advisors perform their role.

The classic grounded theory methodology used in this study is described and the justification for its selection as an appropriate methodology explained in chapter three. The chapter details my philosophical position, provides an overview of the origins and philosophical foundations of grounded theory methodology, comments on the rationale for selecting classic grounded theory, and describes the methodology's processes. The aim and purpose of the research is reviewed and the use of extant literature clarified. Data sources and methods of collection are explained and ethical considerations addressed. Following this, the chapter provides a detailed account of the data analysis and conceptual development process.

Chapter four presents the grounded theory to emerge from this study: **tactical enacting.** The grounded theory is presented in two parts with the first part explaining the sub-process *cultivating* and its conceptual categories *building* and *projecting* and the second, the sub-process *influencing* and its conceptual categories *promoting* and *persuading*.

A discussion of the grounded theory of **tactical enacting** via the application to the grounded theory of an analytical framework related to Foucault's concept of governmentality is offered in chapter five. The first section of the chapter gives the rationale for applying a Foucauldian analysis to the grounded theory and continues with a brief explanation of the concept of governmentality along with others relevant

to the analysis and provides justification for their use. In the second section, a detailed account is given of how learning advisors, in **tactical enacting,** constitute themselves both as the performing subject and the ethical subject.

The final chapter offers conclusions from the study and considers the contribution the research makes to practice, research and method. Recommendations for practice and potential areas for future research are included and conclusions regarding the research approach are also presented. The chapter comments on achievement of the research aims, evaluates the research findings, addresses limitations and concludes with a personal reflection on the research.

Conclusion

By introducing the research and providing an overview of the thesis structure, this chapter sets the scene for the others which follow. The first of these following chapters orientates the reader to the field of study via a contextual overview which considers the contemporary tertiary education environment in New Zealand and examines the impact of that environment on how learning advisors perform their role.

Chapter two

The learning advisor and their workplace: A contextual overview

Introduction

In classic grounded theory methodology, a review of literature is not carried out at the beginning of the study but later during analysis after the core and related categories have emerged. The purpose is threefold. Firstly, it is to assist the researcher to avoid preconceiving the research and remain open to discovery and emergence; secondly, to ensure reviewed literature stays relevant to the core and related categories as the grounded theory is integrated; and lastly, to prevent wasting time reviewing literature that may not be relevant to the emerging grounded theory (Glaser, 1998). For these three reasons, this thesis does not begin with an in-depth critical review of literature related to learning advising. Instead, it presents a contextual overview which considers the contemporary tertiary education environment in New Zealand and examines the impact of that environment on how learning advisors perform their role to serve as orientation to the field of study. This contextual overview also serves to reconcile not carrying out a literature review in the field of study with the need to be informed about the research area of focus (McCallin, 2006). Literature relating to the emerging grounded theory's key concepts was reviewed later in the research process and woven into the grounded theory and appears in chapter four.

Accordingly, this chapter sets out a contextual overview of tertiary education in New Zealand and of the learning advisor. The aim is to situate the study within this broader context and to highlight significant issues related to the contemporary tertiary education environment and the impact of that environment on how learning advisors perform their role. The chapter is divided into two sections. Section one, comprising two parts, considers the contemporary workplace. The first part of this section explains the tertiary education system in New Zealand and the second discusses the nature of

the contemporary tertiary education environment. Together the two parts paint a picture of the workplace within which learning advisors perform their role. Section two examines the learning advisor in the workplace. Specifically, the section examines the impact of the contemporary workplace environment on how learning advisors perform their role.

The contemporary workplace

The contemporary workplace: The New Zealand tertiary education system

The tertiary education system in New Zealand covers all post-school education. It is a "comprehensive national system of tertiary education" (Ministry of Education [MoE], 2007, p. 77), which includes higher education, applied and vocational education, foundation education and community education (MoE & Ministry of Business, Innovation and Employment [MBIE], 2014). Higher education delivers degree and postgraduate education; applied and vocational education delivers education and qualifications for industry; foundation education covers basic literacy, language and numeracy skills training; and community education provides opportunities for those with low or no qualifications to enter tertiary education (MoE, 2014). Except in the under 19 age bracket, New Zealand has high rates of participation in tertiary education which are above the average rates of other Organisation for Economic Co-operation and Development (OECD) countries (MoE & MBIE, 2014).

Tertiary education is delivered through a network of TEOs comprising universities, ITPs, wānanga, PTEs and community education organisations (Figure 1).

TEOs

Public TEOs

Private TEOs

Community education
organisations

8 universities

PTEs (~260 funded by TEC)

Adult and community
education providers and
schools (~400 funded by TEC)

18 ITPs

13 industry training
organisations

3 wānanga
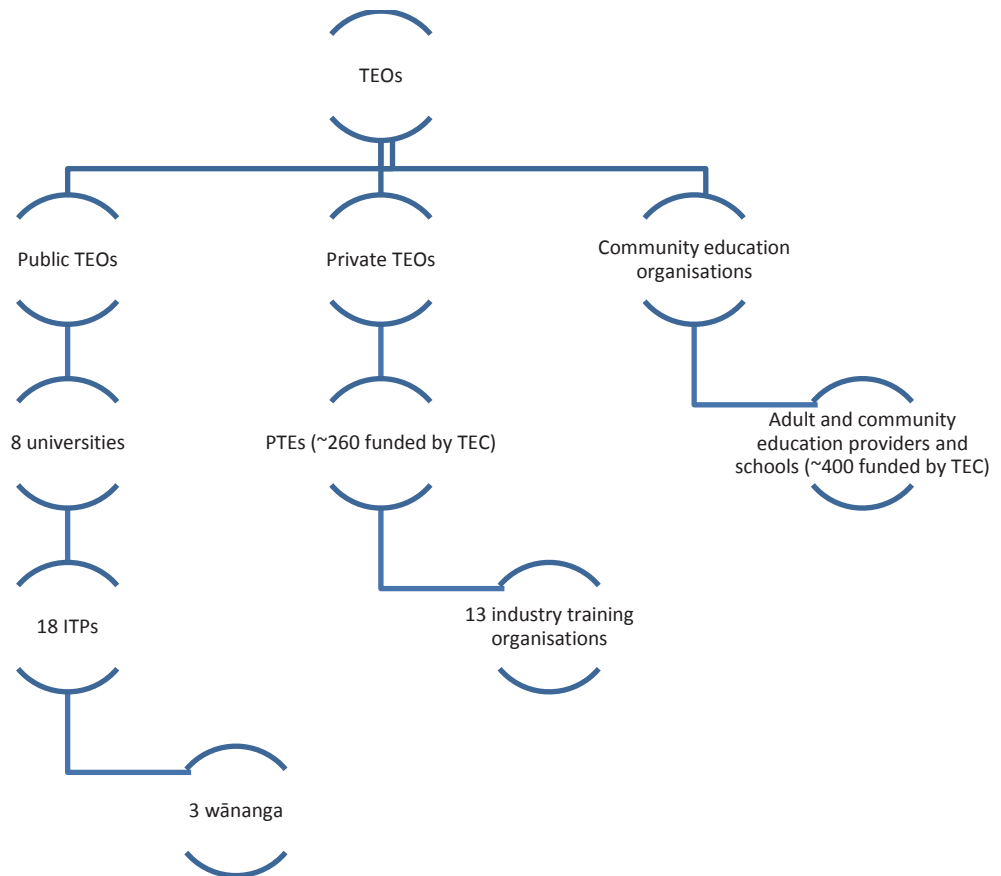
Figure 1. Adapted from the Tertiary Education Commission (TEC) diagram outlining the structure of the TEO network in the New Zealand tertiary education system (TEC, 2014, p. 31). ITPs = institutes of technology and polytechnics; PTEs = private training establishments; TEOs = tertiary education organisations.

The universities offer mostly degree level programmes and the ITPs offer vocationally focused sub-degree and degree level programmes. The wānanga[2] offer a range of sub-degree and degree level programmes within an environment that emphasises Māori[3] culture, and the PTEs offer sub-degree and undergraduate degree programmes orientated towards industry. The TEO network also includes industry training organisations, which set industry standards and facilitate workplace-based learning and training (MoE, 2012). In addition to the network of TEOs, there are a number of government agencies responsible for tertiary education. The Ministry of Education is

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[2] Wananga are TEOs and regarded as the peers of universities and polytechnics.

[3] Māori: Indigenous people of New Zealand.

the principal policy advisor and the Tertiary Education Commission (TEC) allocates government funding and monitors the performance of government-funded TEOs. MBIE identifies skills shortages and future skills demand and sets science and research priorities. Two additional agencies contribute to the tertiary education system in New Zealand. The first, Careers New Zealand, provides information to help prospective students make decisions about their education. The second, Education New Zealand, works with TEOs and other government agencies to promote New Zealand education overseas (MoE, 2014). Quality assurance in the tertiary education system is managed through the New Zealand Qualifications Authority and Universities New Zealand.

Tertiary education policy is expressed through the Tertiary Education Strategy, which articulates the Government's long- and medium-term priorities for tertiary education (MoE, 2014). Individual TEOs describe how they will address those priorities through their investment plans developed in collaboration with the TEC. The current strategy, issued in March 2014, identifies six priorities for the system: "delivering skills for industry, getting at-risk young people into a career, boosting achievement of Māori and Pasifika,[4] improving adult literacy and numeracy, strengthening research-based institutions, growing international linkages" (MoE, 2014, p. 11). In addition to these six priorities, the Government has tasked TEOs with improving the quality of their programmes and services, growing the enrolments of particular groups of people and increasing the number of students who complete their qualifications and progress to higher levels of tertiary education (MoE, 2014).

The Government is the primary funder of tertiary education in New Zealand. The New Zealand Government funds tertiary education to a greater extent than do governments in other OECD countries. New Zealand TEOs receive 65 per cent of their funding from government compared with 46 per cent in Australia, 35 per cent in the United States and 30 per cent in the United Kingdom (OECD, 2014). While the New Zealand Government invests heavily in tertiary education, it limits access to that education through funding caps. The level of funding is negotiated with the TEC via an

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[4] Pasifika: Peoples from the South Pacific region living in New Zealand.

investment plan which prescribes the number and type of students a TEO can enrol and the tuition fees it can charge. Investment plans also document TEO progress against the priorities set out in the Tertiary Education Strategy. If TEOs fail to achieve agreed participation rates or progress against priorities, they can be penalised financially.

The New Zealand tertiary education system described here serves as background and context to the discussion on the nature of the contemporary tertiary education environment which follows and builds further a picture of the workplace within which learning advisors perform their role.

The contemporary workplace: The tertiary education environment

Since the 1980s, the tertiary education environment in New Zealand has been one of continuous change (McLaughlin, 2003) and expanding regulation (Levi-Faur & Jordana, 2005) driven by a neoliberal turn in government education policy (Marginson, 2013). The neoliberal turn in policy was motivated by the Government's desire to increase transparency, accountability and communication in relation to tertiary education quality and standards and for fiscal efficiency (TEC, 2008) and was accompanied by the importation of neoliberal business and market ideologies into tertiary education. As the MoE in its briefing to the incoming Minister noted, "The tertiary funding system was designed to support increased access and equity through a market-driven model" (MoE, 2008, p. 25). Tertiary education policy and strategy documents of successive governments reveal "the 'big ideas' for education policy remain those of the 1980s"(Hawke as cited in Crawford, 2016, p. 11) with a continuing neoliberal flavour, including the desirability of the market model and idea of education as a personal investment, and a focus on economic goals, responsiveness, flexibility, quality outcomes and fiscal constraint (MoE, 2008, 2011; TEC, 2012), along with strengthening performativity requirements (TEC, 2014). For example, the most recent government strategy document clearly reflects a neoliberal flavour, as the following four excerpts demonstrate:

The new Tertiary Education Strategy 2014-19 has been developed to …
contribute to the Government's focus on improving New Zealand's economic
outcomes. (MoE & MBIE, 2014, p. 2)

Our next steps must lead the tertiary education system to become more flexible
and strategic, by: ensuring that the tertiary education system performs well;
ensuring the system can adapt more quickly to change, including … changing
patterns of demand. (MoE & MBIE, 2014, p. 6)

We need a tertiary education system that … delivers educational performance
that compares with the best in the world … New Zealand needs higher quality,
more relevant provision from TEOs that offers value for money and improved
outcomes for the country. (MoE & MBIE, 2014, p. 6)

We will continue to have high expectations of TEOs' performance in terms of
outputs, efficiency and student achievement. (MoE & MBIE, 2014, p. 7)

As part of the neo-liberal agenda for tertiary education during the 1980s, tertiary
education transformed from an elite to a mass system. While massification increased
the number of people enrolling in tertiary education in New Zealand (MoE, 2002), it
also brought about changed ideas regarding the nature and purpose of tertiary
education and new forms of relationships between TEOs and government funding
agencies (Boden & Nevada, 2010). The Government took tighter control of TEOs
through a variety of means but predominantly those associated with funding
allocation, performance management regimes and audit (Boden & Nevada, 2010).

Regulatory systems intended to make TEOs more efficient and accountable and ensure
"a clear return on investment" (TEC, 2012, p. 7) have flourished. Organisations and
their education professionals[5] are held accountable for maximum efficiency (Deem,
2001) and student outcomes (TEC, 2014) and the tertiary education workplace is

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[5] Education professional: Umbrella term used in this chapter to represent teaching, support and
administrative staff working in TEOs in New Zealand.

infused with the language and practice of "performance indicators, quality assurance measures and academic audits" (Olssen & Peters, 2005, p. 313). The work of TEOs is directly controlled through capped funding levels and performance indicators and a customer and quality assurance focus (Henkel, 2000). Information about organisations' performance is published annually to improve public accountability and five per cent of funding from government is linked to TEO performance of the previous year (TEC, 2014). This emphasis on performance and accountability focuses organisational attention on student outcomes and therefore on education professionals. Such emphasis embeds a culture of performativity into tertiary education and into education professionals' everyday working lives.

The various policy and strategy documents of successive governments reveal the push to move TEOs to adopt models of operation that support a focus on efficiency, quality and outcomes (MoE, 2008, 2011). Accordingly, the tertiary education workplace has been reinvented as a place of business (Shore & Wright, 2000). Private sector management practices have been adopted (Anderson, 2008) to increase efficiency and accountability (Pick, Teo & Yeung, 2012). A business model, with its emphasis on efficiency and accountability, is assumed to improve education quality without increasing costs (Szekeres, 2006) in a climate of "continuing need for fiscal restraint … and a drive for cost effective education" (MoE, 2011, p. 7). By reinventing TEOs as places of business, tertiary education becomes a commodity, and students are customers purchasing products and services (Canaan & Shumar, 2008; Saunders, 2011). The language of customers and products replaces the language of students and qualifications (Parker & Jary, 1995). Educational work changes, and education professionals' roles become more consumer-driven (Harris, 2005) and bureaucratised (Debowski, 2007).

To manage their business in fiscally tight times, TEOs embrace the consumer metaphor (Emerson & Mansvelt, 2014), market themselves aggressively to increase the number of fee-paying students they enrol (Jones, 2014) and restructure their organisations to meet changing government goals and priorities and the demands of customer-orientated students (Tight, 2013). As a result of the drive to attract fee-paying students, the

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number of international students studying at New Zealand TEOs has increased by 17 per cent since 2008 (Education Counts, 2014). The increase in international student numbers, along with the Government's widening participation agenda, results in students with diverse cultural backgrounds, experiences, levels of preparedness, and needs entering tertiary education. Such a student population has a significant impact on the role and work of education professionals.

As consumers and paying customers, students, unsurprisingly, may have expectations about the "desirable outcomes being purchased" (Ransome, 2011, p. 211), which can conflict with education professionals' expectations about student learning. The paying customer orientation potentially diverts students' attention away from their responsibilities as learners and their engagement in learning. A customer may consider they have few "responsibilities beyond the economic" (Davis, 2011, p. 88). Those students who are driven by an economic responsibility may underperform, plagiarise and cheat in order to achieve the desired outcome in the shortest possible time and with minimal effort (Davis, 2011). The customer orientation may lead some education professionals to compromise their educational principles in favour of guaranteeing student satisfaction (Corbeil & Corbeil, 2014). They may, for example, placate rather than challenge learners (Harrison & Risler, 2015), flatter rather than correct, and mark assignments leniently in an effort to ensure 'customer satisfaction' with their teaching and support (Furedi, 2011). Despite the consumer model of tertiary education positioning learning as an economic transaction and students as passive customers, there is evidence the model can be reinterpreted to position learning as a transformative transaction and students as active participants (Emerson & Mansvelt, 2014).

The view of student as customer and education as a commodity can lead students to enrol in undemanding courses that require low levels of commitment and engagement on their part (Molesworth, Nixon, & Scullion, 2009), promote a sense of entitlement in them (Van Andel, Bótas & Huisman, 2012), distort the relationship between student and education professional (Corbeil & Corbeil, 2014), and de-professionalise professional roles (Tight, 2013). The relationship between the student and education

professional becomes one of customer–supplier (Bauman, 2005) in which the professional delivers the expected outcome and has their performance measured in relation to that outcome (Bailey, 2014). The outcome is the achievement of a qualification by the student and is the sole measure of success.

The shift to business models of management in TEOs has given rise to intensified accountability regimes (Hemer, 2012) and a performativity culture (Roberts & Codd, 2010). Education professionals are under constant pressure to perform. They are monitored and subject to a variety of accountability measures related to their work (Shore, 2010). Monitoring, accountability and performativity regimes are a part of the landscape of everyday working life in TEOs (Lynch, 2010). While representing the reality of everyday life, these regimes impact on education professionals in ways that do not always enhance their working lives.

Justified as a means to improve quality, the "dominant performative ethos" (Archer, 2008, p. 385) of the tertiary education environment monitors education professionals' performance through externally imposed measures as opposed to professional judgement (Ball, 2012). Education professionals, as Roberts (2007) observes, are treated as "*untrustworthy* beings … and must have their 'performance' monitored and assessed regularly" (p. 362). The use of external measures is a low-trust approach to measuring performance. A high-trust approach, with its internal processes of professional judgement, integrity and self and peer regulation, has been replaced with external regulatory processes and performance indicators (Lynch, 2010). Over time, a low-trust environment, coupled with the responsibility to perform, affects education professionals' identity and the way they carry out their work (Beck & Young, 2005) and has the potential to stifle their commitment and passion for that work (Bailey, 2014). Professional identity is intimately connected to perceptions of autonomy (Clegg, 2008) and personal and professional values (Smith, 2012). Autonomy and values are under threat in the contemporary tertiary education environment, which not only privileges business values and practices (Winter, 2009) but also embeds them in traditional educational work and measures professional performance against those values.

There is no doubt education professionals are experiencing significant change and decreasing control over their work due to government policy direction and the continuing commercialisation of tertiary education (Fredman & Doughney, 2012; Tight, 2013). Within the explicitly business-like TEO, education professionals are expected to internalise organisational goals and priorities and shape their own role, work and priorities to match. At the same time, they are pressed to direct their energy and attention to meeting performance criteria and set targets as opposed to meeting students' needs – an example of value replacing values (Ball & Olmedo, 2013). It can be challenging for education professionals to adapt to these changes and demands (Billot, 2010). The ability of professionals to adapt is hindered by the detrimental effect changing demands have on their identity (Shore, 2010), values (Bailey, 2014) and ability to determine and manage their work autonomously (Fredman & Doughney, 2012).

The contemporary tertiary education environment requires education professionals to organise themselves in relation to "indicators and targets" (Ball, 2013, p. 137). All work must be counted and only that which can be measured counts (Lynch, 2010). By way of example, learning advisors' work is subject to "performative imperatives" (Percy, 2011, p. A138) in relation to its contribution to student success outcomes and its efficiency as measured by the allocation of consultation time to individuals or by the number of students using advising services. Services that do not contribute directly to student success outcomes – in other words, are not the right products (Davies & Petersen, 2005), or are inefficient in terms of allocated time per student – do not count and are under the threat of discontinuation (Cameron & Catt, 2013). Similarly, when the number of students using advising services is small, and therefore does not count, learning centres may be disestablished or merged with other services and advisors subject to redundancy.

The emphasis on performance privileges outcomes that meet a narrow set of criteria over all other outcomes. In doing so, performativity defines and controls who counts and what counts and further embeds the culture of performativity within tertiary education (Roberts, 2013). An environment valuing work that can be counted

encourages education professionals, including learning advisors, to deprioritise work that is not countable and take up only that which is. Prioritising work that counts over work that doesn't makes professionals reluctant to take up voluntary activities (McInnis, 2000) or additional roles such as programme leadership or committee membership (Middleton, 2009).

The Government's continuing desire for fiscal restraint and its goals of economic growth and labour market productivity for tertiary education (MoE, 2014) have a direct effect on the programmes TEOs offer. Programmes that do not link directly to employment outcomes and those with low enrolments, and therefore are uneconomic, are closed. These actions lead to organisational restructuring, downsizing and redundancies with a concomitant declining sense of job security amongst education professionals. A recent survey of work and wellbeing in the New Zealand tertiary education sector reveals 60 per cent of education professionals think their jobs will be restructured within the next two years and 30 per cent believe they will be made redundant (Bentley, McLeod & Teo, 2014). As resources are cut and organisations restructure, professionals find themselves with increasing workloads (Houston, Meyer & Paewai, 2006) due to non-replacement of staff, increased class sizes and the requirement to do more with less (Cage, 2012b; Szekeres, 2006).

Tertiary Education Union documents of recent years (Tertiary Education Union, 2009, 2010, 2015) detail the ongoing workload pressures education professionals face as fewer of them teach and support growing numbers of diverse students. Workloads related to, for example, large class sizes and meeting the needs of large numbers of international students and those underprepared for tertiary study not only increase the time professionals spend on their work but also change the nature of that work (Bentley et al., 2014). Education professionals find themselves spending more of their time meeting students' pastoral care and academic skills development needs and on administrative tasks related to performativity (Shore, 2010). Additionally, the fallout from the student-as-customer mentality, such as higher levels of plagiarism and cheating amongst students, requires education professionals to spend time dealing with academic dishonesty issues. Spending time on such issues takes them away from

their core educational work and negatively impacts student learning (Tertiary Education Union, 2010).

High workloads in combination with performance expectations have a detrimental effect on education professionals. However, professionals are known to be complicit in the performativity culture of tertiary education because they see no alternative and want to retain their jobs (Canaan, 2008). Additionally, the high workload reality of their everyday working lives leaves them with little time or energy to contest the culture. According to McInnis (2000) education professionals are losing the ability to determine and control their work. Such lack of control, in combination with high workloads and job insecurity, leads to increased levels of stress and decreased job satisfaction amongst them (Bentley et al., 2014).

Education professionals in New Zealand work in a fluctuating environment dominated by a prevailing culture of performativity, intensifying workloads, decreasing resources and changing student relationships. This environment creates particular concerns for the category of education professionals known as learning advisors. Learning advisor concerns are considered in the following section.

The learning advisor in the workplace

The contemporary tertiary education workplace environment of constant change, declining resources, intensifying workloads and culture of performativity impacts on the way learning advisors perform their role. In this fluctuating environment, learning advisors are vulnerable, like "canaries at the mine face" (Carter, 2010, p. 72). So how does this environment of constant change and culture of performativity impact on how learning advisors perform their role? What are their concerns? What are their responses? Learning advising literature of recent years reveals three main areas of concern related to the contemporary environment within which advisors perform their role. These areas of concern are the performativity culture, professional identity and the insecure workplace. Each area of concern and the actions taken by learning advisors to resolve concerns is considered separately in the discussion which follows.

The performativity culture

The contemporary tertiary education environment casts learning advisors, and other education professionals, as "units of resource" (Shore & Wright, 2000, p. 559) whose performance must be measured and monitored to ensure quality and alignment with organisational goals and priorities. Measuring and monitoring occur within a culture of performativity, which, according to Ball (2012), "links effort, values, purposes and self-understanding to measures and comparisons of output" (p. 19). Performativity means learning advisors can no longer be trusted to be performing a valuable role (Davies & Bansell, 2007; Roberts, 2007). Instead, they must constantly prove it by reshaping their professional goals and priorities to align with organisational and national goals and priorities and ensuring their performance can be measured against organisational targets (Ball, 2012; Manolo et al., 2009). What's more, performativity threatens to transform learning advisor practice into a service that can be measured rather than the social process it is (Caanan, 2008) and its value defined by "agencies of surveillance" (Bryson, 2004, p. 54) rather than advisors themselves. It is no longer an acceptable measure for learning advisors just to know amongst themselves their role has value or to rely on student use of advisor services and/or their thanks as evidence of value (Carter, 2010; Cluett & Barrett-Lennard, 2013). A culture of performativity has replaced a culture of trust (Strathern, 2000), and measurement is prized over professional judgment (Ball, 2012) and self-regulation (Szekeres, 2004).

The need to constantly prove the value of their role is a prominent theme in the New Zealand learning advising literature of the past ten years. Acheson (2006), writing in the proceedings of the 2005 ATLAANZ conference, while suggesting the increase in the number of students accessing learning advisor services nationally over the previous decade is proof the role is sufficiently valuable, and that advisors 'perform', noted the increasing need to quantify that value in "a climate of fiscal constraint and the need to justify funding" (p. 222). In such a climate, value is narrowly defined in order for it to be measurable (Davies & Bansel, 2010), and so it becomes performance that can be measured against specific organisational productivity and efficiency targets (Shore, 2008) rather than through professional judgement (Whitty, 2008). Learning advisors are

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productive and efficient when they make a positive contribution to the achievement of organisational goals and do so in the least amount of time and with the fewest resources (Walker, 2009).

Learning advisors have become more accountable for the achievement of organisational goals than they have been previously (Gera & Cartner, 2013; Yeo, 2013), and there is pressing and constant need for them to measure their performance against organisational targets to prove value (Oh & Henley, 2013). While learning advisors are not immune to the bottom line of organisational review and restructuring (Davies & Bansell, 2010), demonstrating how their role contributes to the achievement of organisational goals "is critical to the survival" (Morris, 2008, p. 100) of the role in financially constrained times (Acheson, 2006).

Learning advisors in New Zealand are not alone in having to prove the value of their role in new ways. Advisors in Australia are subject to similar imperatives (Clerehan, 2007; Percy, 2011) and increased scrutiny (Berry, Collins, Copeman, Harper, Li & Prentice, 2012; Wilson, Li & Collins, 2011). Learning advisors in both countries are advised to act quickly to enact organisational policies (Cluett & Barrett-Lennard, 2013) in order to survive (Manolo, 2009) and to change their measurement systems and what counts as value to ensure alignment with organisational requirements (Morris, 2008).

Taking action to enact organisational policies and align measurement systems and concepts of value with those of the organisation allows learning advisors to demonstrate the right kind of value (Davies & Bansel, 2010) to a wider and more influential audience (Radloff, 2006). Demonstrating value to a wider audience and ensuring fit in a tertiary education environment where the advisor role is increasingly subject to the vagaries of changing organisational policies (van Rij-Heyligers, 2005) is no easy task. The task is further hampered by the fact that learning advisors lack a robust identity (Carter, 2008) and a coherent discipline (Mitchell, 2007) and occupy a peripheral position within TEOs (Cameron, 2010).

While learning advisors agree on the need to measure their performance more effectively (Berry et al., 2012), and in ways that "count as good" (Davies & Bansel, 2010, p. 8) by the organisation, they acknowledge measuring performance is a difficult and fraught task (Carter, 2010). The difficulty of the task and its importance is evidenced in the learning advising literature by the increase from 2009 in the number of authors debating the issue and addressing the 'how to' of measuring learning advisor performance. Such an increase demonstrates the extent to which advisors are working to align their professional goals and priorities with organisational and national tertiary education goals and priorities (Fraser et al., 2010) and changing their practice and systems in response to measurement and monitoring requirements (Morris, 2008). Aligning their professional goals with organisational ones and changing practice and systems are pragmatic and strategic moves aimed at proving value and establishing learning advisors as key participants in tertiary education (Fraser et al., 2010). In Australia, the Association for Academic Language and Learning also has explicitly aligned its goals with national tertiary education goals to achieve similar ends (James, 2012).

Repositioning their role and practice to align with organisational goals and priorities and measuring their performance against organisational targets are "pragmatic act[s] of survival" (Davies & Bansel, 2010, p. 18) for learning advisors in the turbulent times of organisational review and restructuring (Cage, 2012a; Fraser et al., 2010) and increased scrutiny (Carter, 2010). Despite the fact that repositioning their role in this way lodges it firmly within the performativity culture, advisors are agreed that doing so does not displace their core values nor detract from the "exciting task of teaching learning" (Carter, 2010, p. 74). Aligning practice with organisational goals and priorities and measuring performance against organisational targets serves learning advisor self-interest by providing new ways to achieve success and recognition (Davies, 2005); namely, promoting the advisor role more widely, enhancing its visibility and proving its value (Manolo et al., 2009).

While the contemporary tertiary education environment requires learning advisors to prove their value in ways that may conflict with traditional ways of demonstrating

value, they seem able to "maintain their sense of their own value" (Clerehan, 2007, p. A69) by using the performativity culture to their own ends. These ends are, specifically, to increase their visibility and professional status, clarify what they want to achieve through their professional practice, be accountable not just to the organisation but, more importantly, to students and peers, and shape their professional identity (Houston et al., 2006). According to Canaan and Shumar (2008) being professionally accountable to students and peers helps mitigate the impact of the performativity culture. Proving the value of the advisor role in terms of its contribution to the achievement of organisational goals and priorities has become part of business as usual for learning advisors and is integrated into the way they talk about themselves and their role. Twenty per cent of the ATLAANZ 2013 conference presentations explicitly reference measurement and organisational targets. At the 2014 conference the figure was almost double that.

It is evident that learning advisors largely accept the state of affairs that is the performativity culture within which they perform their role. Acceptance comes firstly because it is difficult to argue with a performativity culture that promotes some of the values advisors agree with – for example, responsibility for and transparency about the outcomes of their practice (Lorenz, 2012) – and secondly, because measuring and monitoring performance becomes the natural way of things (Davies, 2003). Learning advisors come to see it is reasonable that others want to know what they do and why they think it is worth doing (Stevenson & Kokkinn, 2009) and seek to add value to their role by accomplishing the required performance targets (Ball, 2013).

While internalising performativity norms has a disciplinary and perpetual self-development effect so learning advisors readily "take the necessary steps to document and evidence" (Fraser et al., 2010, p. 40) their contribution to the achievement of organisational goals and priorities in order to improve that contribution (Manolo et al., 2009), performativity is more often explicitly linked to being both pragmatic and strategic. Pragmatic advisors align their goals and priorities with those of the organisation (Cluett & Barrett-Lennard, 2013; Morris, 2008; Oh & Henley, 2013) and work strategically by developing networks, alliances and professional collaborations to

maximise opportunities to contribute to the achievement of organisational goals (Gera & Cartner, 2013), boost visibility and help safeguard their role (Pocock, 2010). Being pragmatic and working strategically is all about getting on, being visible and demonstrating value in ways defined by the organisation (Barnett, 2008).

In tandem with the incorporation of performativity values and measures into the way learning advisors perform their role, there has been increasing adoption of the language of performativity in their accounts of their work. The use of words and phrases such as performance measurement, continuous improvement (Manolo et al., 2009) and outcomes (Fraser et al., 2010) has become frequent. While the adoption of performativity values, measures and language may be due to learning advisors internalising performativity norms, it is also a strategic move on their part. Taking up the mantle of performativity and using its language to describe their role offers advisors "scripts for self-fashioning" (Lee & McWilliams, 2008, p. 74) which help make their role visible (Cluett & Barrett-Lennard, 2013; Devlin, 2011) and legitimate (Holland & Silvester, 2012) and move them away from the margins of academic work to somewhere closer to the centre (Trafford & Cowan, 2014).

Although there are many accounts in the learning advising literature located in the language of performativity and organisational goals, there are just as many located in the language of professional goals and priorities. Such accounts describe the advisor role as enriching learning (Pocock, 2010), nurturing and supporting (Radloff, 2006), believing in students (Carter, 2010) and fostering transformation (Manolo, 2009), and emphasise the importance of student satisfaction and the student voice as valid measurement of learning advisor value and performance (Naepi, 2012). The language of these accounts demonstrates that advisors' professional goals and priorities are a strong driver of their behaviour. Learning advisors derive intrinsic satisfaction from opportunities to make a difference to student learning and development (Carter & Bartlett-Trafford, 2008) and from students' thanks (Carter, 2010) and appreciation (Houston et al., 2006).

Ball (2013) suggests the culture of performativity makes people uncertain about how to value and prioritise their work, but learning advisors appear to be adept in meeting the challenges of performativity in their daily work and preserving the professional goals and priorities important to them. They do not value or prioritise organisational goals and priorities over their professional ones or over their commitment to students (Colley, James & Diment, 2007). Retaining their own goals and priorities and deriving satisfaction from doing so helps learning advisors to maintain the balance between values-driven and performance-driven behaviour (Barnett, 2008).

Professional identity

The contemporary tertiary education environment generates identity concerns amongst learning advisors (Carter, 2010). Identity is also a concern for other education professionals who claim the tertiary education environment is unsupportive of and undermines traditional academic values (Smith, 2012; Waitere, Wright, Tremaine, Brown & Pausé, 2011) with adverse consequences (Archer, 2008; Billot, 2010). Adverse consequences include "identity schism" (Winter, 2009, p. 122), arising from a conflict between personal and organisational values, and the increasing corporatisation of identity, which serves to depoliticise education professionals' identity (Hofmeyr, 2008). While there is little indication that learning advisors experience the same adverse consequences as do other education professionals, they still are concerned about their professional identity and work consciously to construct the identity that will help them secure their place in tertiary education (Van der Ham, Sevillano & George, 2010).

Identity, according to Briggs (2007), is a multifaceted construct comprising "professional values (what I profess), professional location (the profession to which I belong) and professional role (my role within the institution)" (p. 471). The performativity culture of tertiary education directly challenges this construct by expecting learning advisors to reshape their values to accommodate those which may be in conflict (Henkel, 2000) with their own and assume the role of "an implementer of policy" (Stronach, Corbin, McNamara, Stark & Warne, 2002, p. 109). As a result, advisors can become caught between the economy of performance – how they are

measured and evaluated – and the ecology of practice – their own values, role and practice (Stronach et al., 2002).

However, learning advisors do not appear to be caught between the economy of performance and the ecology of practice to any significant extent. They manage any disconnect between the two by retaining their professional values (Fraser et al., 2010), strengthening their location by building a strong professional association (Carter, 2008) and reshaping their role and practice to accommodate organisational values (Manolo et al., 2009). There is no suggestion that advisors ignore or overtly resist changes that potentially could erode their role and core values. Instead, learning advisors appear to be both pragmatic and strategic. While primarily interested in values and a role which prioritises student learning and development, advisors understand their wider interests can be realised by accommodating organisational values within their identity (Gera & Cartner, 2013; Morris, 2008). They are clear about the need to construct the "right kind of identity" (Blum & Ullman, 2012, p. 370) and direct much activity towards this end.

Identity is a product of history and perception (Billot, 2010). Both history and perception link the learning advisor role, and therefore identity, to the "deficit discourse of widening participation" (Burke, 2008, p. 128) and remediation of the non-traditional student (Channock, 2011; Zeegers, 2004), and the remedial tag lingers on (Crozier, 2007). Learning advisors themselves, according to Stirling and Percy (2005), are complicit in sustaining the remedial tag because it gives them a place within tertiary education, albeit one on the margins of academic work. Advisors are urged to shed the remedial tag and secure their place (Trembath, 2007) by claiming the role of contributor to the achievement of organisational goals and priorities (Crozier, 2007). Thus, while the changing tertiary education environment has an undesirable impact on learning advisor identity, at the same time it offers new possibilities (Becher & Trowler, 2001) because identities are "forged, rehearsed and remade in local sites of practice" (Lee & Boud, 2003, p. 188). New possibilities are realised by advisors reshaping their identity, role and core values to accommodate organisational values in a strategic move

to position themselves to best advantage while retaining their "principled and valued spaces" (Archer, 2008, p. 268).

Despite the argument about learning advisor identity in the contemporary tertiary education environment being constructed by organisational values and the performativity culture to achieve organisational goals rather than professional ones (Billot, 2010), advisors appear to be constructing an identity for themselves which meets, at least to some extent, the requirements of both the organisation and their professional selves (Cameron, 2010). Learning advisors are grasping the opportunity and using organisational values to construct their identity and promote their role within tertiary education because they see it as a way of improving their status and security. They use the language of performativity as a tool to make their work visible and reposition their role as critical to organisational agendas (James, 2012).

Together with developing a strong identity in terms of values and role, learning advisors are actively engaged in defining, strengthening and articulating their profession (Carter, 2008). Advisors in Australia, the United Kingdom and Canada are similarly engaged in the task of defining and strengthening their profession, seeking to determine "the conceptual framings and professional and organisational practices within which the field understands itself" (Lee & McWilliam, 2008, p. 68). Webb (2001), in her plenary address to the Australian Association for Academic Language and Learning conference with the theme *Changing Identities*, applauds the conference focus on identity and calls for learning advisors to act strategically, promote themselves and claim their expert knowledge in order to secure their place within tertiary education. In a similar vein, Samuels (2013), writing in the *Journal of Learning Development in Higher Education*, emphasises the need for the learning advising community in the United Kingdom to become more organised and increase its visibility to ensure survival. The Learning Specialists Association of Canada (2015) in its conference invitation highlights the changing nature of the profession and the importance of claiming their professional identity and place in times of shrinking budgets.

Identity is grounded in a defined occupational community (Henkel, 2011). A defined occupational community articulates the values and goals central to a collective identity and supplies the concepts and language through which learning advisors can communicate their individual identity (Taylor, 1992). The need to define their distinctive occupational work (Evetts, 2009) and articulate their profession has been a perennial concern for learning advisors. Advisors in New Zealand, along with those in Australia and the United Kingdom, ask, "Who are we?" (Trembath, 2007, p. 64), "What is the profession?" (Webb, 2001, p. 2), "How do we best define our identity?" (Carter & Bartlett-Trafford, 2008, p. 62) and "Where are we going?"(Zeegers, 2004, p. 25). Answering these questions is seen as critical work in the continuing conversation about professional identity in order to promote and safeguard learning advisor interests (ATLAANZ, 2012) and maintain student-centred professional values (Fraser et al., 2010).

The process of defining and articulating their profession can be traced in learning advisor literature from the formation of ATLAANZ in 2000 (ATLAANZ, n.d.) to the present through three activity streams: building a theoretical base for the field of practice, defining a distinctive body of knowledge and formally articulating professional practice. The desired outcome from these activity streams clearly aligns with some of the accepted characteristics of a profession; namely, practice based on theoretical knowledge, a code of conduct and a reputable professional association (Whitty, 2008).

Developing "theories and concepts" (Webb, 2001, p. 13) and a "philosophical framework" (Holland & Silverster, 2012, p. 16) for professional practice, long recognised as a critical task, has been a recurrent theme in learning advising literature since Manolo (2007) called for more work to be done in identifying and describing the theoretical basis of professional practice. Developing a theoretical base for professional practice is deemed critical for two main reasons. Firstly, theories provide powerful explanations of the complexity of professional practice, and secondly, the lack of a theoretical base for practice threatens its survival (Stevenson & Kokkinn, 2007).

Australian advisors also have been concerned with developing a theoretical base to help ensure their survival in tertiary education (Garner, Chanock & Clerehan, 1995; Taylor, Ballard, Beasley, Bock, Clanchy & Nightingale, 1998). While progress on developing a theoretical base for professional practice in New Zealand is slower than in Australia and less substantial, there is a growing body of New Zealand literature dating from 2010 proposing models and theories to underpin practice and documenting their use (Carter, 2010; Mitchell, 2013; Pang, 2012; Roberts & Reid, 2014; Silva, 2013; Sturm, 2010).

In tandem with developing a theoretical base for practice, learning advisors are focused on building a body of knowledge for it through research. A distinctive body of knowledge gives the learning advising profession a coherent discipline (Mitchell, 2007), enables it to claim a particular identity (Velautham & Picard, 2009), and articulates its purpose, practice and contribution to those inside and outside the profession. Learning advisors increasingly are engaged in researching and documenting their practice (Cameron & Catt, 2013; Hobbs & Doffs, 2013; Protheroe, 2009) in order to build a distinctive body of knowledge to assist them in claiming their place in today's tertiary education environment and negotiating it for tomorrow's (Stirling & Percy, 2005).

Alongside developing a body of knowledge and repertoire of theoretical perspectives for their work, learning advisors are occupied with articulating their philosophy and practice more explicitly. Since Webb (2001) first noted "there is so much that is assumed" (p. 12), the ever-changing tertiary education environment has confronted advisor assumptions on many levels. As discussed earlier in this section, learning advisors are challenged to articulate the purpose of their role, its goals and values, the nature of practice and its scholarly base, and to prove value beyond student satisfaction with it. Advisors' response to the challenge has been to map and categorise their philosophy and practice (Fraser et al., 2010).

The mapping and categorising of professional practice, while a response to environmental change, is also a significant step in the development of the learning

advising profession (Lee & McWilliam, 2008). The work of mapping and categorising began in 2003 with the development of a draft document describing some of the principles and practices of learning advising work (Cameron, Fraser, Looser & Thorns, 2005). Further discussions at national conferences and other fora over the intervening years to 2012, in conjunction with the findings of a 2008 survey about the learning advising role (Cameron & Catt, 2009), resulted in a professional practice document being formally adopted by ATLAANZ at its 2012 Annual General Meeting. The introduction to the professional practice document states:

> This document clearly articulates the professional practice of tertiary learning advisors in Aotearoa New Zealand. We hope that the document will benefit ATLAANZ members by explaining our profession to 'outsiders' and, in so doing, safeguarding and promoting our status within our organisations and the tertiary sector as a whole. … Arguably the greatest potential benefit of this professional practice document, though, is its role in helping tertiary learning advisors in Aotearoa New Zealand develop a clear sense of identity and belonging. (ATLAANZ, 2012, p. 1)

The professional practice document, in suggesting that explaining the learning advisor role will help safeguard and promote the status of the role, is a clear statement of the continued vulnerability professionals feel and the ongoing work they must do to secure their place in tertiary education.

An insecure workplace

A feeling of vulnerability and the need to secure their place in tertiary education are consistent threads in learning advisor accounts and are illustrated no more plainly than in the themes of ATLAANZ's annual conferences. In 2007, the theme *Walking a Tightrope* refers to the "contemporary risks and uncertainties" (Manolo, Bartlett-Trafford & Crozier, 2008, p. viii) of the environment within which learning advisors work and reflects the challenges they face in finding the balance between student

needs and performativity requirements and between proving the value of their work and actually doing it (Manolo et al., 2008).

The 2009 conference theme *Shifting Sands, Firm Foundations* alludes to the "particularly vulnerable" (Cameron, 2010, p. iv) position many learning advisors find themselves in due to decreasing funding and organisational restructuring. While noting the work which needs to be done to secure their place in tertiary education, it is believed sharing ideas and practice will help learning advisors establish a firm foundation for their work. In 2011, the metaphor *Navigating the River* is used as the conference theme to highlight the ongoing challenges advisors face performing their role in the unsettling times of review, restructuring and reduced budgets (Cage, 2012a). In the foreword to the conference proceedings, ATLAANZ's president expresses his wish for less turbulent times ahead. Regrettably, less turbulent times are not realised as evidenced in the president's welcome to the 2012 conference where he notes how challenging the year has been for learning advisors "as the economic belt has tightened a few more notches and we all have to do more with less" (Cage, 2012b, p. 9).

Conference themes in 2013 and 2014, *Learning Connections in a Changing Environment* and *Enhancing Student Success in a Changing World*, continue the trend of referencing changing times. Remarks in the 2013 conference proceedings about the fallout from organisational restructuring and diminishing budgets, specifically, "more redundancies which is evidenced in the number of members who are no longer with us" (Cage, 2013, p. iii), and the 2014 conference programme which noted the reality of "our sector coming under increasing budget constraints" (Stewart, 2014, p. 2), reveal the continuing precariousness of the learning advisor role within tertiary education.

Despite a set of tensions related to the precarious nature of their role within the tertiary education workplace, performativity, and the lack of a robust identity, learning advisors are optimistic and morale seems to remain reasonably high. A 2013 survey of learning advisors working in TEOs in New Zealand (Cameron & Catt, 2013) reports 90 per cent of respondents are satisfied in their role and levels of satisfaction are highest amongst those who have been in their learning advisor role for more than six years.

Those who are most satisfied are also the ones who have been on the receiving end of most change and living with insecurity the longest. That these learning advisors are satisfied may suggest they have accepted the changing tertiary education environment and happily comply with new demands they view as 'common sense.'

A changing environment and new demands, while constraining in many ways, offer learning advisors opportunities to position themselves and their role differently than they have done previously and to take advantage of moments of change to do so. Learning advisors seem able to take advantage of moments of change to assimilate new practices and adopt new language which help them adapt and survive to a greater or lesser extent in the contemporary tertiary education environment while retaining the core values and professional goals which sustain them. Advisors are pragmatic and strategic. They use performativity requirements and "the language of the moment" (James, 2012, p. 80) to prove the value of their role, construct their desired identity and claim their place at the centre of organisational education work. Proving value and constructing a desired identity continues to be critical work for learning advisors in order to "gain authority and stability" (Percy, 2015, p. 882) within tertiary education in continuing changing times.

Conclusion

Learning advisors in New Zealand work in a fluctuating environment dominated by a prevailing culture of performativity, intensifying workloads, decreasing resources and changing student relationships. This challenging workplace environment creates particular concerns for learning advisors related to performativity requirements, the lack of a robust professional identity and the insecurity of their role within tertiary education.

Chapter three presents the research methodology. The chapter sets out my philosophical position, provides an overview of classic grounded theory, details the research design and addresses ethical considerations before providing a full account of the data analysis and conceptual development process.

Chapter three

Methodology

Introduction

This chapter describes the classic grounded theory methodology used in this study and provides justification for its selection as an appropriate methodology. The chapter begins by detailing my philosophical position and continues with an overview of the origins and philosophical foundations of grounded theory methodology. The rationale for selecting classic grounded theory is then addressed and the methodology's processes described. The chapter continues with a review of the study purpose and aim; data sources and methods of collection are then explained and ethical considerations addressed. Following this, the chapter provides a detailed account of the data analysis and conceptual development process.

Philosophical position

A researcher's values and views about the world are important considerations in conducting research. These views and values combine in a philosophical position that shapes a researcher's beliefs and influences what she chooses to research, her approach to it and how she interprets the results (Newby, 2014). A researcher's philosophical position encompasses her beliefs about the nature of reality (ontology), the nature of knowledge (epistemology) and how she should go about finding out knowledge (methodology). My position, and the one taken for this research, embraces critical realist ontology, pragmatist epistemology and classic grounded theory methodology. Critical realism, pragmatism and classic grounded theory combine to establish a robust position within which to situate a study that seeks to understand and explain the role of the learning advisor in tertiary education in New Zealand.

Positioning critical realism

There are a number of philosophical positions a researcher might adopt for her research project that lie on a spectrum between the two ontological poles of realism and relativism. A researcher adopting a realist position assumes an objective and knowable reality that can be reported truthfully, while a researcher adopting a relativist position assumes multiple realities, and therefore multiple truths, and that nothing can be known absolutely. I subscribe to neither realist nor relativist ontological positions. As a researcher I do not believe in objectivity and neutrality or that collecting and assembling 'facts' reveals reality, nor do I believe reality is fully represented by individuals' subjective interpretations. Instead, I hold a position somewhere in between. Critical realism (Bhaskar, 2008) best represents that position and allows me to occupy a middle ground. In taking the middle ground of critical realism I am not reducing reality to "unknowable chaos or a positivistic universal order" (Clark, Lissel & Davis, 2008, p. E68), nor am I proclaiming my perspectives reveal an objective truth or that they have no influence on truth. Rather, I am acknowledging the existence of a reality independent of my knowledge of it (Scott, 2010) without removing the influence of my own socially produced and imperfect perspective of reality (Bergene, 2007). Because any knowledge I might claim is imperfect, I am not seeking absolute truth through my research; rather, I am hoping to "improve [my] interpretations of truth" (Cruickshank, 2003, p. 2).

With a critical realist view of reality and in order to improve my interpretation of truth, I needed an epistemology that would enable me to "take messy reality seriously" (Proctor, 1998, p. 363). Pragmatism, which values inquiry into reality that has consequences for peoples' lives, provided an ideal epistemological position for this study, which sought to discover what is going on for learning advisors today and to be useful to them.

Positioning pragmatism

Research to a pragmatist "is not to find truth or reality … but to facilitate human problem-solving" (Powell, 2001, p. 884), and so pragmatism, with its focus on problem solving and on knowing as opposed to knowledge (Bryant, 2009), appealed to me. I adopted pragmatism for this study because it enabled me to deal with learning advisor professional concerns by concentrating on practical outcomes. Epistemologically, pragmatism recognises that the most we can achieve through enquiry is sufficient rather than total truth and in searching for sufficient truth I ask myself: What is the best evidence of truth (Honderich, 2005)? In embracing pragmatism my answer is that the best evidence of truth is the usefulness of the outcome (Bryant, 2009). For pragmatism, any way of thinking or acting that leads to practical solutions is useful and community adoption of those solutions confirms their efficacy (Honderich, 2005). The pragmatist emphasis on usefulness and practical solutions resonated with me because the purpose of this study was for its outcomes to be useful to learning advisors. Furthermore, if they used it, I would know it was valid and true.

Truth, to a pragmatist, is that which "facilitates fruitful paths of human discovery" (Powell, 2001, p. 884) but is not fixed. When a particular truth proposition loses its usefulness it becomes false; when another more useful one appears it becomes true (Pansiri, 2005). A pragmatist researcher does not insist her propositions are truth or that they are necessarily consistent with each other. Rather, if they work she keeps them (Powell, 2001). Because my professional work has always been driven by the desire to make a practical difference in students' lives, pragmatism was a neat personal and philosophical fit for me.

A focus on practical outcomes demands a methodology that will deliver those outcomes. Grounded theory, which produces a theoretical proposition that fits, works and is relevant (Glaser, 1992), is that methodology. Furthermore, grounded theory's modifiable nature is congruent with pragmatism's view of truth. Pragmatist epistemology partnered with grounded theory methodology gave me a means through

which to discover a useful theory with problem-solving power that would offer learning advisors ways to manage their role.

Positioning grounded theory

Grounded theory, originating in the mid-1960s with the work of Barney Glaser and Anslem Strauss and the publication of their book *The Discovery of Grounded Theory* (1967), is a research methodology involving the rigorous and systematic development of an inductive theory about a substantive area and is "a total methodological package" (Glaser, 2010, p. 1). Grounded theory is emergent and the researcher remains open to examining the main concern of people in the substantive area with the purpose of providing a theoretical explanation of how that concern is resolved (Glaser, 1978).

Neither Glaser nor Strauss has made explicit reference to grounded theory's philosophical roots in any of their publications (Nathaniel, 2011). While a number of authors make a variety of assumptions about grounded theory's ontological and epistemological foundations based on Glaser's and Strauss' backgrounds, there seems to be general agreement that the methodology has its roots in pragmatism and symbolic interactionism (Bryant, 2009; Bryant & Charmaz, 2007; Nathaniel, 2011; Stern & Poor, 2011; Strübing, 2007). While not explicitly referencing pragmatism in his work, Strauss acknowledges its influence on his early intellectual development (Bryant, 2009) and also that of social interactionism during his study under Herbert Blumer at the Chicago School of Sociology in the 1940s (Stern & Poor, 2011). Glaser's influences at this time were Paul Lazarsfeld, under whom he studied quantitative methodology and qualitative mathematics at Columbia University, in tandem with the study of theory construction under Robert Merton, from whom he gained insight into the field of sociology (Stern & Poor, 2011). Glaser was introduced to Strauss' perspectives when they worked together on research into terminal care (Glaser, 1998). Strauss was more strongly influenced by pragmatism and symbolic interactionism than was Glaser, but the tenets of both these philosophical positions informed their terminal care research and were influential in the discovery and development of grounded theory (Benoliel, 1996).

Despite the difference in their academic and research backgrounds, Glaser and Strauss shared a number of beliefs about research and its goals (Stern & Poor, 2011). They had become dissatisfied with sociological research because of its emphasis on testing pre-existing theory about social situations rather than on generating new theory from the perspectives of those within social situations. Both were critical of the verification focus and quantitative methods of sociological research and its "doctrinaire approaches" (Glaser & Strauss, 1967, p. 7) to forcing data to fit pre-existing theory. Glaser and Strauss believed pre-existing theory generated in one setting was a poor tool for explaining why people behaved in a particular way in another setting (Stern & Poor, 2011). Instead, they proposed it was participants themselves who held the answer to what was going on in a particular social situation and therefore researchers needed to explore participant perspectives in order to understand and theorise (Strauss, 1987). Accordingly, they developed grounded theory to give researchers the tools to generate theory grounded in the perspectives and experiences of participants. According to Glaser (2005), grounded theory allowed researchers "to harness the logic and rigor of quantitative methods to the rich interpretive insights of the symbolic interactionism tradition" (p. 143).

In spite of having developed grounded theory methodology together, Glaser's and Strauss' views on what it comprised later differed. These differences gave rise to two different models of grounded theory: Straussian (Strauss & Corbin, 1990) and Glaser's classic grounded theory (Glaser, 1978, 1992, 1998, 2001, 2003, 2005; Glaser & Strauss, 1967). Subsequent to the split between Glaser and Strauss, two other models of grounded theory emerged: constructivist grounded theory (Charmaz, 2000) and feminist grounded theory (Wuest, 1995). In making changes to grounded theory according to their particular philosophical position, Strauss and Corbin (1990), Charmaz (2000) and Wuest (1995) have actually developed different methodologies (Hernandez, 2012). Furthermore, these methodologies are different enough from Glaser's original grounded theory that they serve a different purpose (Bryant & Charmaz, 2007).

I wanted the research to enhance learning advisors' understanding of their professional role in tertiary education and to be useful to them. Because of the differences between the four main models of grounded theory, I therefore had to make a decision about the model I would adopt for this study. The decision was made easier by the fact that two of the models – constructivist grounded theory and feminist grounded theory – did not align with my ontological and epistemological positions – critical realism and pragmatism – and so I immediately discounted both of those options. Having done this I was faced with the choice of the Straussian or the classic grounded theory model and I chose classic grounded theory.

Choosing classic grounded theory methodology

I chose classic grounded theory methodology for this study for a number of reasons. These reasons were philosophical congruency, ability to address complexity, explanatory potential, and an outcome that would fit, be relevant and work. A methodology with explanatory potential and a relevant and workable outcome would deliver the study's purpose.

Glaser (1998) claims classic grounded theory is a-philosophical. However, Nathaniel (2011) counter-claims and asserts classic grounded theory is "amazingly consistent" (p. 189) with pragmatist philosophy. In being consistent with pragmatism the methodology fits my own epistemological stance and consequently was an appealing choice for this study. For this reason I chose to work with the pragmatist foundation of grounded theory methodology as the explicit framework.

Previous studies on learning advising have revealed it is a complex and ill-defined practice (Manolo, 2008), and so I needed to choose a methodology that could embrace complexity. Classic grounded theory assumes people lead complex social lives and consequently are solving important problems all the time (Glaser, 1978). Classic grounded theory provides a theoretical explanation of how people solve those problems and therefore holds promise for producing a clear picture of what actually is (Simmons, 2011). Producing a clear picture of what is going on for learning advisors by

generating a grounded theory that fits reality in their eyes means they will remember and use it (Glaser, 1978). With its ability to produce a clear picture of and for learning advising, classic grounded theory was an ideal choice for this study.

From a methodological point of view I was committed to exploring what was going on for learning advisors, and so I needed a methodology that would allow me to explore and uncover participants' perspectives. Classic grounded theory seemed to be a better option than the Straussian model for maximising the potential for this. Classic grounded theory, with its inductive–deductive mix, emphasises discovery and emergence (Glaser, 1992) whereas the Straussian model, with its emphasis on deduction and verification, is more definitive about what to look for (Strauss & Corbin, 1990). I did not know what to look for and wanted a methodology that would give me directions for each aspect of the research process, but allow for creativity and intuition (Glaser, 1998), and at the same time help me to put aside my preconceptions as much as possible and discover what was going on for learning advisors from their perspectives, not mine.

Classic grounded theory, in contrast to the Straussian model, assists the researcher to put aside her preconceptions by starting with data collection rather than a review of existing literature. Furthermore, classic grounded theory's inductive process requires the researcher to be open to issues that emerge from the data so that her propositions derive from the data rather than from her prior assumptions (Glaser, 1992; Glaser & Strauss, 1967). Straussian grounded theory is more directive than is classic grounded theory, and its coding matrix and dimensional analysis processes (Strauss & Corbin, 1998) can result in data being forced to fit a predetermined theoretical framework. Forcing data towards a predetermined framework is likely to stifle discovery and result in conceptual description, not grounded theory (Glaser, 1992). The intended outcome of my study was not a conceptual description but rather a grounded theory that would fit, be relevant and work for learning advisors.

I chose classic grounded theory as the methodology for this study because I wanted to be as open as I could to discovering what learning advisors' main concern was and

how they resolved that concern. Being open to issues emerging from the data means the researcher may discover that participants' main concern is something other than that she anticipated (Glaser, 2001), and this is what happened. When I began this study I did not expect to be writing a grounded theory about the tactical enactment of a professional role. I chose classic grounded theory because of its ability to produce an explanatory theory (Glaser & Strauss, 1967), and my experience has been that it does. The grounded theory is discussed in chapter four.

Overview of the classic grounded theory process

Classic grounded theory research seeks to conceptualise the main concern of participants in a substantive area and how they continually resolve that concern (Glaser, 1978). The emphasis is on participants' concern, not that of the researcher, with the aim of providing a theoretical explanation of how the concern is managed. The classic grounded theory research process is recursive with all stages of the process revisited as needed during theory development. While the process is not linear, its stages are data collection and open coding, memo writing throughout the study, selective coding, theoretical sampling, memo writing, theoretical coding, and sorting and writing up.

Data collection

Interviews and observations are common methods for collecting data in classic grounded theory studies. However, Glaser's (1998) contention that everything is data means data can be collected from any source; for example, conference papers, books and casual conversations. Data collection and open coding occur simultaneously.

Open coding

The process of open coding yields substantive codes. Codes are conceptualisations and are achieved by asking the following set of questions: What is this data a study of? What category does this incident indicate? What is actually happening in the data?

What is the main concern being faced by participants and what accounts for the continual resolving of this concern (Glaser & Holton, 2004)?

Developing substantive codes involves coding data incident by incident. Incidents are segments of data and can be a single line, a paragraph or a page. Each incident, which indicates a concept, becomes one of the indicators for that concept. Thus, indicators of a particular concept are interchangeable for one another. In identifying concepts, incidents are compared with other incidents and with emerging concepts in what is known as constant comparison. Constant comparison is used throughout all stages of coding. Open coding continues until the core category and related concepts emerge (Holton, 2007).

Selective coding and theoretical sampling

Having identified the core category, the researcher selectively codes for the core and related categories, ignoring data that are not relevant. Analysis centres on saturating the core and related categories and their properties. Theoretical sampling is unique to grounded theory and delimits further data collection to that relevant to the core and related categories. The emerging categories (concepts) drive all data collection. Interview questions, which initially are open, become more direct because they are grounded in the discovered concepts and are focused on saturating categories. Coding continues until the core and related categories are saturated. Saturation occurs when the data yield no further properties (Glaser & Strauss, 1967).

Memo writing

Memo writing is an important process in classic grounded theory (Glaser, 2013). Memo writing begins at the initial data analysis stage and continues throughout theory development. Memos hold ideas about concepts and how concepts relate to each other, and help the researcher keep track of her emerging grounded theory (Glaser, 1998). Memo writing helps the researcher to think and to capture moments of insight and

clarity throughout the multiple phases of the research. As the grounded theory develops, memos are written about memos.

Theoretical coding, sorting and writing up

Theoretical coding is the process of identifying how concepts relate to each other "as hypotheses to be integrated into a theory" (Glaser, 2005, p. 2) and is a key process in grounded theory development. Theoretical codes are emergent and derive from analysis and sorting of memos rather than of data. Memo sorting is an important stage of classic grounded theory analysis. Memos are sorted into piles by concepts and inform the writing up of the grounded theory; sorting and writing can occur simultaneously. The write-up stage is simply writing the piles of memos into a clear and coherent grounded theory which meets Glaser's (1992) criteria of fit, work, relevance and modifiability. A coherent grounded theory fits reality in the eyes of those in the substantive area and works by explaining the variation in how participants resolve their main concern. The grounded theory becomes relevant when it fits and works, and a well-constructed classic grounded theory is modifiable in response to new data.

Overview of research aim and purpose

This research sought to discover what is going on for learning advisors and to learn something new about the topic. I wanted to suspend what I knew about learning advisors and to discover things I did not know. As noted by Glaser (1998), the research question that begs to be answered through classic grounded theory is: What is going on here? Therefore, this research focused on exploring individual experiences and perceptions of the learning advisor role to discover group patterns of behaviour and build a grounded theory of learning advisor behaviour in the New Zealand contemporary TEO.

Understanding what is really going on for learning advisors and how they resolve concerns was the focus of data collection and analysis (Glaser, 1998). The purpose of the study, in developing a grounded theory that explains learning advisor behaviour,

was to enhance learning advisors' understanding of their role and work and to be useful to them. The explanatory potential of the research could offer learning advisors useful perspectives and practical options in relation to performing their role amid shifting expectations in the contemporary TEO and perhaps give them "the power to control it better" (Glaser, 2010, p. 7).

Data sources

The learning advisors who participated in this study were recruited from the population of learning advisers working in TEOs in New Zealand and identified through the ATLAANZ member list. Participants were contacted directly by me via e-mail and invited to participate in the project. Participants were selected because they were knowledgeable about the general problem area (Glaser, 1978) and a purposeful and convenience sample of learning advisors from the region in which I live was selected as an initial data source. Selecting advisors from the region in which I live afforded me ease of access to participants, the phenomenon and the setting under study.

Because initial data were collected through observing learning advisors in their workplace during a consultation with a student, the managers of the advisors who agreed to be observed were contacted via email and their permission to access students sought (Appendix K). Learning centre managers and learning advisers were asked to distribute written information about the research to potential student participants and students invited to contact me directly if they wished to volunteer to participate.

Subsequent samples of learning advisors were recruited from the population of advisors working in geographical locations other than the region in which I live. These learning advisors were selected purposefully to achieve a diversity of experience and practice within a variety of TEO settings. These advisors were selected also on the basis of theoretical purpose and relevance for developing the emerging categories with the intention of further developing and refining those categories. Learning advisors who participated in the group workshop/discussion were recruited via the ATLAANZ

conference programme. Those learning advisors who wished to participate simply selected and attended the timetabled conference session.

Initially, I estimated the study to involve approximately 25 learning advisors. However, in classic grounded theory exact sample size cannot be determined in advance; it emerges as the study progresses. In total, 42 learning advisors participated in this study, four were observed during individual consultations with students, 23 were interviewed (two face-to- face interviews, 16 telephone interviews and five interviews via email) and 20 took part in a group workshop/discussion. The one-hour–long observations were conducted in July 2011 and the interviews, lasting from 45 to 75 minutes, were conducted between August 2011 and July 2012. The one-hour long group workshop/discussion was held in November 2012 during an ATLAANZ conference where I had been invited to present and discuss the study's initial findings. Table 1 gives details of the participants in each data collection method. Learning advisors who participated in the observations were not interviewed and vice versa. However, five advisors participated in both an interview and the group workshop/discussion.

Table 1. Data Sources

Data sample	Gender	TEO	Tertiary environment
Observation	Female: 3 Male: 1	University: 2 ITP: 2	Face-to-face
Interview	Female: 21 Male: 2	University: 9 ITP: 11 PTE: 3	Face-to-face: 19 Distance: 4
Group workshop/discussion	Female: 15 Male: 5	No information	No information

Note. ITP = institute of technology and polytechnic; PTE = private training establishment; TEO = tertiary education organisation.

In a classic grounded theory study, everything is data, and the researcher is encouraged to exploit serendipity and collect and use data from unplanned opportunities when they arise (Glaser, 1998). With this in mind, I took advantage of my attendance at two conferences in November 2012 and December 2013 to supplement the observation, interview, and group workshop/discussion data with data from conference paper presentations. While classic grounded theory encourages the inclusion of any type of data, including that collected serendipitously, I did not use data from casual conversations because I was uncomfortable about the ethics of doing so. In the final stages of analysis when I had developed the grounded theory sufficiently, I sought and used relevant extant literature as another source of data to integrate into the grounded theory through constant comparison with the emerging concepts.

Data collection

I adopted classic grounded theory methodology for this study because I was interested in generating data that would help me understand learning advisor behaviour and because classic grounded theory enables participants' perspectives to be centre-stage. Learning advisor perspectives needed to be centre-stage if the study was to achieve its aim and purpose, and therefore I needed data collection methods that would facilitate this. I chose observation, informal interviews (Fraenkel & Wallen, 2010) and a group workshop/discussion because I believed that together these three methods would be a powerful tool for gathering data to unveil learning advisors' main concern and how they resolved that concern. Unveiling the main concern and how that concern is resolved or processed is classic grounded theory's purpose (Glaser, 1992).

Observation was chosen as a data collection method because it allowed me to see how learning advisors behaved in their 'natural' situations (Burton & Bartlett, 2009) and discover what they actually did, not what they thought they did (Fraenkel & Wallen, 2010). The opportunity to gather data through observing learning advisors in their workplace interacting with students was compelling because I was acutely interested in finding out what learning advisors actually did and complement the data gathered

through interview which would tell me what advisors thought they did. As an observer I might notice things that had become routine for advisors which would help me build a picture of advisor behaviour and understand the context for that behaviour (Merriam & Tisdell, 2016). Furthermore, observing advisors working with students would give me a first-hand encounter with the field of study rather than the second-hand account I would get via interviews (Merriam & Tisdell, 2016). People do not always talk about what they really think or do during interviews and so coupling observation with interview data would help paint a rich picture of learning advisor behaviour.

Informal interviews were chosen because I wanted to find out the *how* of learning advisors' professional lives as well as the *what* (Fontana & Frey, 2008). I chose to carry out informal, in-depth interviews with a small number of advisors rather than structured interviews with a larger number because I was interested in advisors' values, opinions, attitudes and behaviour, and in how they explain and conceptualise their experiences. I was not interested in using structured interviews with a large number of learning advisors to reach a representative sample in order to make particular statements about them. Informal interviews offered an effective method for gaining insight into advisor's issues, giving advisors the opportunity to think about their experiences in depth and to talk about and reflect on issues important to them.

I chose to carry out the majority of the interviews via telephone and email rather than face-to-face and the decision to do so was driven by a number of considerations. Firstly, telephone and email interviews afforded a larger geographical access to learning advisors than would have been afforded by face-to-face interviews. Secondly, telephone interviews can encourage participants to disclose more information than they might do during face-to-face interviews because of relative anonymity and an increased sense of privacy (Sturges & Hanrahan, 2004). Thirdly, interviewing advisors by telephone would allow me to make notes unobtrusively. Making notes unobtrusively can help conversations occur more naturally and move along more smoothly than they may do during face-to-face interviews (Smith, 2005; Sturges & Hanrahan, 2004). Finally, email interviews tend to promote more self-reflection than

face-to-face interviews do and participants often are more candid when writing (McCoyd & Kerson, 2006).

A group workshop/discussion provided me with the opportunity to tap into the experiences of a diverse group of learning advisors and is congruent with grounded theory methodology where the emphasis is on group patterns of behaviour. Interactive group discussion was an appealing choice because of the likelihood of generating data different from that of the observations and interviews. Data from a group discussion is likely to be different to that derived from individual interviews because participants share their opinions, listen to others' and perhaps moderate their opinions in response to those of others' (Hennink, 2014). Additionally, group discussion as a data collection method works well for topics people could discuss in their everyday lives but don't always have the opportunity to do so (Macnaghten & Myers, 2004). Setting up an opportunity for busy learning advisors to discuss a topic they were knowledgeable about but might not have the opportunity to discus with each other seemed worthwhile. The conversational interaction amongst group workshop/discussion participants might lead to insights that may not come to light through the one-to-one interviews.

Data collection began with the observations in order to scope the phenomenon under investigation and identify its major components. Learning advisors were observed in their workplace as they interacted with students. Such a broad focus was a useful way to gather a holistic view of learning advisors performing their role. The potential for observer bias and observer effect was mitigated as much as possible by making sure advisors and students knew they were being observed and were clear about the observation's purpose. I adopted a reflexive approach to help minimise observer bias by reflecting on and writing down how my own perceptions and expectations influenced what I saw. In classic grounded theory studies, researcher perspectives are not ignored; rather, they are incorporated into data collection and analysis as more data to be constantly compared (Glaser, 1998). According to Glaser (2002) "Bias is just another variable" (para. 11).

Interviews were treated as conversations, and during initial interviews learning advisors were asked broad, open-ended questions to generate a story (Nathanial, 2008) relevant to them, not me. Questions became more specific as the grounded theory emerged but remained as open-ended as possible. As the research process continued, theoretical sampling indicated what data I needed to collect next and where to collect them (Glaser & Strauss, 1967). The final phase of data collection was in the form of a group workshop/discussion.

During the initial data collection phase, learning advisors were observed during one-to-one, face-to-face consultations with students. Field notes were written throughout and immediately after each observation. In subsequent data collection phases, during initial interviews learning advisors were invited to talk generally about their work to allow what was relevant to them to emerge, and in later interviews they were asked more specific questions to help saturate emerging categories. Field notes were written during and immediately after interviews and all interviews were digitally recorded and transcribed. Glaser (1998) argues recording and transcribing data inhibit researcher creativity because of the time and effort involved. He further argues recording and transcribing leads to descriptive capture rather than conceptualisation. He may well be right, but I was not confident enough to leave the important job of analysis to my yet undeveloped ability to conceptualise with ease. In retrospect, transcribing interview data verbatim may have led to data overwhelm (Glaser, 1998) and contributed to my slowness in conceptualising data and arriving at the grounded theory. Data from the group workshop/discussion were captured on worksheets and on notes written by learning advisors during small-group discussion. Data collected opportunistically from conference papers were captured in field notes during and immediately after the paper presentations.

For record purposes, observation and interview field notes and interview transcripts were assigned the learning advisor's initials, the relevant letter I or O and the date on which the data were collected. For example, the interview held with HC on 7 May 2012 was labelled HC/I/7512. The group workshop/discussion and conference paper data were more simply labelled. For example, GW/1112 indicates data from the group

workshop/discussion held in November 2012, and CP/1213 indicates conference paper data from the December 2013 conference. Interview data were later merged into one electronic document maintaining the initial labelling for retrieval purposes with the addition of alphabetisation to ensure anonymity of the direct quotations from interviews used in chapter four. One or two letters of the alphabet and the page number of the document on which the quotation falls for example, R, p. 304 and AC, p. 369, references all direct quotations. Similarly, conceptual memos, written during data analysis, were labelled according to the date on which they were written, the name of the concept or category to which they related and a sequential number. For example, M1013#23E signifies a conceptual memo written on 10 March 2013 about the concept of enculturating. The number 23 indicates it was the 23rd memo on the concept of enculturating.

Methodological limitations

The methodological limitations of this research are fourfold and relate to classic grounded theory, the methods of data collection, the researcher's capability in both of these areas, and the relatively small number of research participants.

Critics of classic grounded theory claim the methodology's assumption that researchers can approach data without preconception and that data speak for themselves is flawed. According to Olesen (2007), by paying scant attention to the role of the researcher and not addressing the issue of reflexivity, classic grounded theory fails to recognise researcher influence on data construction and interpretation. However, classic grounded theory accounts for researcher bias in so far as researcher perspective is treated as another source of data to earn its way into the grounded theory through constant comparison with other data (Glaser, 1998). While my ability to constantly compare data effectively will have determined whether or not my perspective earned its way into the grounded theory in an appropriate fashion, I attempted to reduce bias and address the potential limitations of the methodology by documenting each stage of the research process in detail. Documenting helped me be reflective and to identify how my assumptions, interpretations, sampling decisions and analysis may have influenced the research (Henwood & Pidgeon, 2011).

Another potential limitation of classic grounded theory methodology lies in its use by novice researchers. Classic grounded theory requires the researcher to be theoretically sensitive (Glaser, 1978), that is, to be able to define and describe categories and see and explain the relationships between them. The level of theoretical sensitivity required to conduct classic grounded theory research competently, particularly when deciding which categories are important and which will form the basis of the developing grounded theory, can be challenging for inexperienced researchers (Päivärinta, Pekkola & Moe, 2011). As a relatively inexperienced classic grounded theory researcher, my ability to be theoretically sensitive will have influenced the way I used the methodology and may have limited the research outcome.

In addition to the limitations of classic grounded theory methodology, there are those associated with the data collection methods used in this research which must be acknowledged. Merriam and Tisdall (2016) argue, "Subjectivity and interaction are assumed [when] the researcher is the instrument of data collection" (p. 147), and so my personal perspective, how I interacted with participants during the observations, interviews and the group workshop/discussion, and my facilitation and note making skills, will have influenced the data collection process and the resulting data.

Data from the observations may be limited by observer effect, observer bias and expectations, and observer skill (Fraenkel & Wallen, 2010). My presence as an observer during learning advising consultations would have had an effect on learning advisor and student behaviour and hence on the outcome of the research (Roach, 2014). While my presence during consultations was not unexpected, and advisors and students may have become used to me towards the end of the one hour observations, they would have reacted in some way to me being there nevertheless and so my presence must be considered a limitation. Additionally, while learning advisor and student behaviour may have been influenced by the research purpose, I was careful not to provide specific details about what I was looking for other than a general interest in observing what happens during an individual learning advising consultation.

Despite my best attempts to be impartial, the data generated through the observations will be biased to some extent. Data may have been influenced by my own experiences

as the manager of a learning centre in a TEO and by how I expected learning advisors and students to behave. To counteract potential bias, I accepted my positionality (Merriam & Tisdall, 2016), made detailed notes of the observations and reflected on my own subjectivity as I did so (Patton, 2015). Even though I made detailed notes of the observations, those notes were dependent on my ability to pay attention to what was important and ignore what was trivial. My level of ability in this regard may have limited the data.

Data from the interviews may be similarly limited. Although informal interviews can be relaxed and resemble the give and take of ordinary conversations, the situation is nonetheless an artificial one which can limit participant responses (Fraenkel & Wallen, 2010). The interviewer must be skilled enough to minimise the artificiality of the situation, create an atmosphere of trust and cooperation, ask good questions, and probe where appropriate in order to elicit full responses from participants and obtain rich data (Fraenkel & Wallen, 2010). My level of skill in conducting the interviews will have limited the data to a greater or lesser extent. Furthermore, the lack of conversational cues such as visual and non-verbal cues during telephone interviews may have created a barrier to in-depth conversations and limited the amount of information, particularly sensitive information, that learning advisors might have divulged (Lechuga, 2012).

As mentioned previously, the success or otherwise of data collection depends to a large extent on the skill of the researcher and my group facilitation skills would have limited data collection to a greater or lesser extent. The number of participants in the group workshop/discussion was relatively large and even though I divided participants into four smaller groups for most of the allocated discussion time, some may not have had the opportunity to speak or to discuss the topic in depth. Also, I was not able to determine if anyone in the small groups dominated the discussion. My skill in facilitating the group workshop/discussion, for example, the clarity of my instructions, the amount of time I allocated to small group discussion and then to the whole group discussion, and whether or not I made sure all those who wanted to say something

were able to do so, and that others did not dominate, may have limited the amount and type of data generated.

The final methodological limitation of this research relates to the number of participants. The relatively small number of participants, 47, means the results are not statistically generalisable; nor are they intended to be. In classic grounded theory research, incidents, not people, count and data is gathered until categories reach saturation (Glaser & Strauss, 1967). The resultant grounded theory aims to be theoretically generalisable rather than statistically generalisable. While the relatively small number of participants is not a limit to grounded theory construction, when combined with the fact that participants were self-selected means the data and results are not representative of all learning advisors.

Ethical considerations in data collection

Anticipating and addressing ethical issues when carrying out research is a key responsibility for researchers. Because personal interviews, observation of professional activity and group workshop/discussion dialogue composed the majority of data for this study, the voluntary participation of learning advisors and protection of their rights were primary considerations. Ethics approval to proceed with the research was granted by the Massey University Human Ethics Committee (Appendix P) and the following ethical considerations observed:

1. **Informed and voluntary consent**

   Prior to their involvement in the research, all learning advisors and students were given full written information about the research purpose, process and intended outcomes, and details about the nature of their voluntary participation (Appendices E, G, I, L). Written consent was obtained from all learning advisors and students (Appendices F, H, J, M, N) and securely stored.

2. **Confidentiality**

   Observations and face-to-face interviews took place in learning advisors' workplaces, and other one-to-one interviews were conducted over the

telephone and via email. Information shared during interviews and the workshop/group discussion was treated confidentially, and the institutions in which learning advisors worked are not identified in any of the study's outputs. All field notes were written anonymously for incidents (Glaser, 2001), and a confidentiality agreement was obtained from the person who transcribed the interviews (Appendix O). All data were stored securely.

3. **Protection from harm**

   Potential harm to participants is difficult to predict. Interviewing can be intrusive and unpredictable in terms of the information participants share and the impact on them of sharing that information, particularly when that information is recorded. In fact, Glaser (1998) discourages the recording of interviews, in part, for this reason. When learning advisors asked during interviews for particular comments not to be reported, those comments were removed from the transcript. Interview transcripts were sent to advisors for editing and the ten advisors who reviewed their transcript removed comments as they saw fit.

   Observing their behaviour can also affect study participants in unpredictable ways and I was particularly alert to the possibility that students may feel some distress at being observed when discussing their learning weaknesses with advisors. With this possibility in mind I offered students who consented to participate in observations the opportunity to meet with me individually before the observation to discuss the observation process, identify any concerns they might have, and how we would deal with those concerns. I also offered to talk with students after the observations in order to identify and deal with any concerns that may have arisen from the observation, particularly concerns about limited benefit from their learning advising consultation, and to assist students to arrange another consultation with a learning advisor if necessary. Advisors participating in the observations were asked and agreed to provide another consultation for any student who felt their learning had been negatively influenced by being observed.

In classic grounded theory, the integrity of a study is reliant on participants being in control of what they say and do (Simmons, 2009), and I was mindful of not interfering with learning advisors' or students' level of control. Nevertheless, I was alert to potential issues, for example, participants indicating verbally or non-verbally that they were uncomfortable or distressed during the interview, observation and group workshop/discussion data collection processes, but none arose.

Approach to data analysis

My approach to the use of tools for data analysis was to follow Glaser's (2005) lead and be wary of using computer-aided software. I was keen to produce as rich a conceptual grounded theory as possible and believed I would have a better chance of doing so by devising my own system for coding and sorting that would allow me to remain close to the data. I was afraid computer-aided coding and sorting would reduce the personal experience of the analysis process and stifle my creativity. I also wanted to make sure I fostered conceptualisation during analysis (Glaser, 2003). Being a novice classic grounded theory researcher, I needed to give myself the best opportunity to conduct a classic grounded theory study by staying as close to the method as I possibly could. With all this in mind, I used handwritten and word-processed notes to capture the immediacy of my thinking during data analysis. Memos were handwritten to stimulate the freethinking required and were hand sorted, re-sorted and integrated during theoretical coding and the writing of the grounded theory. Conducting analysis 'by hand' aligned much more neatly with my personal preference and creative style than a computer software package would have. As a result, I believe the grounded theory is more conceptually rich than it would have been otherwise.

Data analysis

In keeping with the tenets of classic grounded theory, data collected observations, in-depth interviews, a group workshop/discussion and conference paper presentations were analysed according to the constant comparison method (Glaser, 1998). Using constant comparison, the researcher examines data as they are collected, codes and

categorises the data, develops concepts, and writes throughout the analysis process. Constant comparison enables the researcher to see if the data support the emerging categories on a continuing basis and helps establish and verify the categories by identifying their properties and dimensions.

Open coding

Analysis began with open coding (Appendix B) as I examined the data systematically line-by-line, breaking up segments of data (incidents). When comparing incidents I asked a set of questions: "What is this data a study of? What category (concept) does this incident indicate? What is actually happening in the data? What is the main concern faced by the participants? What accounts for the continual resolving of this concern?"(Glaser, 1998, p. 140). I asked these questions of every incident I identified and wrote labels in the margins of the observation field notes and transcribed interviews (Appendix B). I labelled incidents using in vivo labels (learning advisors' own words) to capture the richness of a process or situation and made labels active through gerunds to help me identify more easily the patterns in the data (Glaser, 1996). For example, the incident[6] *when I work with students in groups it is more like I help them to help themselves* was labelled using a gerund and the in vivo label *helping students help themselves*. While I labelled incidents using gerunds as much as possible, I was careful not to "over gerund" (Glaser, 2011, p. 52) and force action labels on static incidents.

As I identified more incidents, some labels grew, became saturated, and were developed into substantive codes. The incidents which built up the codes now became their indicators. While substantive codes comprise many indicators, the indicators were not added up to generate the codes but were examined carefully for similarities, differences and degree of consistency amongst them (Glaser, 1978). While examining the data line by line I tried not to code data into one-incident concepts; rather, I looked for indicators that showed a pattern (Glaser, 2011). Although my inexperience meant initial coding yielded a number of one-incident codes, I became more successful at

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[6] In this chapter incidents and codes are written in italics; initial categories in bold italics and final categories in bold text to help the reader recognise them as such.

identifying multiple, interchangeable indicators of the same pattern and labelling them as coding progressed.

Open coding proceeded quickly and produced a large number of substantive codes. I transferred the codes from the margins of the field notes and interviews and arranged them into a list. I examined the list, compared codes with codes and grouped those codes that seemed naturally to fit together into categories. The categories subsumed the patterns in a number of codes. For example, the codes *establishing connection*, *building trust* and *sharing personal information* became the early category **building the relationship**. Similarly, the codes *identifying the role*, *offering services*, *being pushy*, *promoting services* and *networking* became the early category **promoting services to staff**. Appendix A illustrates early category development.

As the number of categories grew, I began to compare category with category to determine how they might cluster or connect. I wondered what the links between the categories were and how categories might fit together. As I coded and categorised data, I wrote memos to capture my emerging thoughts, questions and tentative ideas about the relationships between codes and categories (Glaser, 1978). Throughout the coding process, I was acutely aware of my experience and prior knowledge of the field I was researching and of being a part of what I was producing. Therefore, I used the memo-writing process to think consciously about my response to the data and the labels I gave to codes and categories. Using in vivo labels as often as I could helped moderate my preconceptions by keeping me close to the data. Recording and reflecting on my own experiences in memos gave me a perspective on those experiences to guard against forcing analysis in a particular direction. Those memos were then constantly compared with other data and woven into the grounded theory as simply another variable (Glaser, 2002).

As I worked with memos and read and reread the data, I began to see how some of the categories could merge to form categories that were more general. For example, the categories **understanding relationship importance**, **building relationships**, **defining relationships** and **relating individually** seemed to be linked because they encompassed

similar patterns of behaviour. It was possible to combine these four categories to form the broader one: *creating relationships*. *Creating relationships* later became a property of the category **relating** (Appendix A).

As new data were collected, I compared them with the conceptual categories I had developed and revised categories where indicated in response to the new data. The revised categories also meant I revisited and re-categorised 'old' data. For example, the category *extending professional expertise* became *cultivating professional identity* as new data indicated the category was more about professional credibility and identity than extending expertise through professional development and research activities. While learning advisors engaged in professional development and research to grow expertise, they were mostly concerned about increasing their credibility in others' eyes and projecting a particular identity.

At this point, I had a list of five categories - *enculturating, relating, tailoring, marketing* and *cultivating professional identity* - but no core category. I wrote a description of the categories and their properties to see what I had and whether or not I could identify a core category (Appendix C). Usually, the core category is discovered through open coding and once discovered guides data collection and theoretical sampling (Glaser, 1978). However, I could not identify a core category from among the categories I had at this stage. I had also begun to see patterns in the data that pointed to a strategic approach to behaviour but I could not quite put my finger on how this thread was relevant. My questions and emerging thoughts were captured in the following memos.

Conceptual memos

25 June 2012. Memo #18mc/cc – main concern/core category
I'm not sure about a core category. I have five categories but I don't think any of them are potential cores. As I understand it, the core category is about how the main concern is resolved but I'm not yet sure about the main concern. Enculturating students to academic literacies is what I have tentatively

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proposed as the main concern, but if it is the main concern, how do I think it is resolved? No one category is at a conceptual level sufficient to subsume/integrate all the others. They are all pretty descriptive still and describing categories does not a grounded theory make.

25 June 2012. Memo #11s – strategy

Learning advisors are also talking about being strategic in terms of their behaviour. They say things like "Relationships with teachers are the shortest route to getting students." Why? What does that actually mean? What are the benefits? Will teachers do advisors' work for them? What work exactly? And "Attitudes come down from programme leaders so I try to build relationships there." Does this mean they make conscious decisions to target particular people to build relationships with – hoping for some sort of payoff down the track? What is the payoff? Is strategy a potential theoretical code?

Before embarking on further data collection, I revisited the data from initial interviews looking for explicit and implied references to strategic behaviour. I wanted to make sure I had recognised all there was to recognise in the data about patterns of behaviour in relation to strategy and to confirm if I needed to find out more.

Theoretical sampling and selective coding

In the absence of a core category, I used my five categories to guide theoretical sampling and selective coding, coding only for those categories. The data I had collected and analysed thus far had been from learning advisors in university settings, and so I theoretically sampled by collecting data from comparison group learning advisors in ITPs and PTEs in order to develop the grounded theory further. I was looking for variation in behaviour and for situations that would provide new properties of my categories and help saturate them (Glaser, 1978). I also wanted to identify more clearly the relationships between the categories. As I collected and coded new data, I simultaneously wrote memos about anything relating to strategy and being

strategic. Analysis of the new data resulted in a reduction from five to three categories and the following memo.

Conceptual memo

16 October 2012. Memo #37mc/cc – main concern/core category

I know I have only described patterns of behaviour so far and now I need to explain them theoretically. Is *enculturating* the general 'problem'/the main concern? Is *cultivating* the core category? Is *cultivating* a stable pattern joining data together? Cultivating processes seem to be everywhere: people have to be 'cultivated' as do relationships and opportunities in order to enculturate ('cultivate') academic literacy in students. If these assumptions are correct then *cultivating* would resolve the main concern of *enculturating*. It doesn't quite fit. If *enculturating* is the main concern – what does *enculturating* in relation to staff look like though? Do learning advisors enculturate staff to their services/role/identity?

Perhaps the link/s between categories is strategies for *enculturating*? Is strategy a stable pattern joining data together? Strategy and tactical behaviour are everywhere. Are they? How might the categories be arranged to work as mechanisms and tactics for *enculturating*? Might strategic behaviour somehow be part of the core category? If so, how would strategic behaviour (what behaviour exactly?) process/resolve the main concern? If strategy somehow processes the main concern, what might be the main concern?

Through theoretically sampling and selectively coding new data for the three categories and their properties and simultaneously writing memos, I began to realise my categories were all about learning advisors' work and the way in which they carried out that work. Yet I could not identify a core category. In preparation for a group workshop/discussion in November 2012 where I planned to 'test' the emergent categories and theoretically sample for new data from amongst a group of learning advisors who had not previously participated in the study, I wrote the following

overview. The brief paper prepared for the group workshop/discussion is included as Appendix D.

November 2012: Overview emergent categories

A significant concern of learning advisors is to assist students to become full participants in the academy by becoming academically literate. There is a clear expectation that students will be stakeholders in their own learning and take ownership of it. Learning advisors work with students to *enculturate* them to academic literacies. Advisors are responsive to individual need and tailor the level and type of service to the needs of individual students.

Positive *relationships* play a key role in *enculturating* students to academic literacies. It is necessary to connect with students and staff in order to establish the conditions favourable for enculturation. *Enculturating* is conditional upon establishing the 'right' relationship with students and staff. These relationships are described as professional, with clear role boundaries and are responsive to the individual.

Learning advisors also express a concern for making sure that services are accessible to students and that they use them; to achieve this end they *cultivate*. Advisors employ a variety of strategies to *market services* to both students and staff. To be successful in this endeavour, advisors need to *manage perceptions*, including dispelling myths about their services, and project an expert and credible professional identity. *Cultivating* is a strategy for *enculturating:* advisors must cultivate others and their own professional identity so that students and staff use their services.

At the group workshop/discussion, I wanted to check out my categories and their properties for relevance and fit among a group of learning advisors. I was also keen to clarify the main concern because I was becoming increasingly unhappy with the category **enculturating**. Furthermore, I was interested in finding out if and how learning advisors talked about being strategic and what that meant. Additionally, I

wanted to gather more data to help identify the core category, because without a core, my grounded theory would lack relevancy and fail to work (Glaser, 1978).

Analysis of the group workshop/discussion data confirmed existing categories and properties and highlighted advisors' strategic approach to their work, but added nothing new to the mix. Despite discovering nothing new about existing categories or strategic behaviour, analysis did reveal learning advisors' main concern to be the broader issue of carrying out their work effectively rather than *enculturating*. Unfortunately, analysis did not advance my understanding of the relationships between the categories nor identify the core category. What I had achieved to this point was a conceptual description of what learning advisors did when carrying out their work and a set of memos about some strategies they used to help them carry out that work. I had little idea about how the categories related to each other and what part strategy played in the mix. The lack of a core category made me nervous about my ability to integrate the emerging grounded theory and I had few ideas of where to take analysis from here. Glaser (1996) advises the "growing pains of being scattered, somewhat confused … and the attendant regressions" (p. xiii) must be tolerated, but I found confusion and regression hard to tolerate. I reread core classic grounded theory texts (Glaser, 1978, 2001, 2011) and read a selection of classic grounded theory studies (Glaser & Holton, 2007; Martin & Gynnild, 2011) to help me find out what to do next and how.

Raising the level of conceptualisation

Subsequent to my reading, I knew I had to raise the level of conceptualisation and so returned to my descriptive categories searching for higher-level concepts that would subsume those categories. As I did this I wrote memos to help me move from description to conceptualisation and to discover how strategy was important. Recoding the categories to increase the level of conceptualisation led to a surprising finding: the category *enculturating* did not fit. I had suspected this was the case and had discarded *enculturating* as the main concern subsequent to coding the group workshop/discussion data. *Enculturating* did not account for the range of services

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learning advisors spoke about, or how those services were differently provided. I believe I adopted this category prematurely and held on to it for so long because I expected to see pedagogy reflected in advisors' accounts of their work. I anticipated a pedagogical explanation and so I found one; *enculturating* academic literacies met my pedagogic expectations. Glaser (1978) notes how categories can appear to emerge quickly and lead the researcher to think they know the real problem. Additionally, promising concepts do not always retain their power or relevance as data are recoded and sorted. For these reasons, Glaser (1978) suggests taking time to pace the analysis and reflect on it, advice I should have heeded at the time.

In hindsight, my preconceptions also probably led me to gather initial data through observations. In believing observational data would help me scope the phenomenon under investigation and identify its major components, I inadvertently set the scene for examining the detail of just one aspect of learning advising services, that of teaching academic literacy, which led to the category *enculturating*. My uncritical acceptance of the category *enculturating* per se and of it as potentially the main concern shaped my focus when coding the subsequent interview data. Further examination and recoding of data resulted in the following memo and the development of the category *providing services*, which was acceptably conceptual and accounted well for the variation in the data.

Conceptual memo

> **10 March 2013. Memo #23e – enculturating**
>
> *Enculturating* has been driven by my assumption of finding a pedagogical explanation for what learning advisors do. *Enculturating* is still too restricted and bogged down in its detail; it doesn't fit/link well to other categories. It also doesn't explain advisors' patterns of behaviour related to services for staff or services for students that are more on the 'pastoral' side.
>
> The data contain a number of references to service and services. Is it more about providing services then? Overarching concept of 'services' – incorporating

partnership/mutual endeavour/responsibility/clearly defined – what it is and what it is not, etc. And being 'professionally' flexible? And adapting self and services to 'fit' individuals? And having to balance student/staff service needs against perceptions/expectations and available time? Services = adapted process and tailored services to meet needs of individuals – therefore the concept incorporates advisors' work with staff and students. Is this why they have to be strategic? *Providing services* fits/links better with other categories than *enculturating*.

I reviewed all other categories which resulted in some reworking of categories and properties. For example, the category ***cultivating*** became the two categories ***promoting services*** and ***projecting identity.*** Similarly, I discovered 'learning advisors' patterns of behaviour', initially conceptualised as *maintaining professional boundaries* (a property of ***relating***), was evident in both categories ***providing services*** and ***relating***. The property therefore became *maintaining service parameters* in the category ***providing services*** and *interpersonal responsiveness* in the relabelled category ***fostering relationships.*** Reanalysis brought about a reworked set of four categories – ***providing services***, ***fostering relationships***, ***promoting services*** and ***projecting identity*** – and the following memo.

Conceptual memo

30 March 2013. Memo #19s – strategy

Being strategic in how learning advisors do some aspects of their work seems to enable them to carry out that work effectively. For example – going into classrooms is strategic because it results in a large number of students being provided with services in a short space of time, demonstrates advisors' expertise and projects the desired identity of credible expert, and increases the likelihood of positive word-of-mouth recommendations – thus saving service promotion time and effort. As one advisor said, "killing two birds with one stone". Is being strategic somehow the core category? Does it help learning advisors resolve or process the main concern, which is carrying out their work effectively? If so, how does it do it exactly? What is its relationship to carrying

out the work? How does strategy model that? It seems insufficient on its own. Learning advisors certainly seem to be strategic in their work behaviour but how does being strategic help them carry out their work?

Generating the theoretical framework

Having confirmed what I believed were the categories and properties accounting for much of the variation in the data, I still needed to discover how the categories related to each other and to strategic behaviour. I needed to look for and propose theoretical links between learning advisors' main concern of carrying out their work and the categories that made up that work. Categories, which are merely themes to describe advisors' work, in themselves do not meet the requirements of a grounded theory. I needed to discover the theoretical codes to understand how the substantive codes related to each other and integrated the grounded theory. I worked to discover the theoretical codes in two ways: sorting (and memoing) my memos, and reading about theoretical codes (Glaser, 2005). I knew I had to become more familiar with the various coding families in order to be sensitive to codes as they emerged during sorting and memoing. I suspected strategy might be a theoretical code but needed to be sure it was emergent and not forced. Theoretical codes emerge in the same way substantive codes emerge, but from analysis of memos, not data (Glaser, 2003).

The theoretical code 'strategy' quickly revealed itself because many memos contained comments, questions and tentative suggestions about tactics, influencing and persuading, positioning, means to ends and even manipulation. A second theoretical code, 'balancing', seemed to emerge and appeared to help explain how learning advisors managed the demands of their work. Balancing is handling a number of variables at the same time in order to manage (Glaser, 2005) and seemed to be what learning advisors were doing. Balancing can also be used as a basic social process (BSP) and appeared to fit my emerging theoretical framework in that it could model how advisors processed their main concern (Glaser & Holton, 2005). Glaser (2005) advises the researcher to try out a particular model to see if it works, and because a number of memos contained comments and questions about weighing up, gauging, evaluating,

prioritising and balancing in order to carry out work effectively, I decided to take a chance, knowing the code would work or not as analysis continued.

Through my first attempt at theoretical coding, I arrived at a tentative and incomplete explanation of how learning advisors carried out their work using the theoretical codes strategy, balancing and BSP, which I labelled **tactical balancing** and outlined in a memo.

Conceptual memo

30 March 2013. Memo #6TC – theoretical code

May 2013

Overview of tactical balancing 25 May 2013
Notes added 30 May 2013

Gauging – What are the problems/demands? What are the available resources? What's my professional judgement?	Calculating – How/what am I going to do? What is the 'fit' with my professional judgement? What's the best way to solve problem/s manage demand/s?	Acting – Doing it so that all problems solved/demands are managed effectively/satisfactorily.
Assessing	Prioritising	Optimising
Weighing	Cultivating	Persuading
	Positioning	Opportunising

The main concern of participants is to manage the demands of their work effectively. Professionals resolve this main concern through the process of *tactical balancing*. The problem of managing work demands effectively is resolved more or less successfully through the *tactical balancing* process.

Tactical balancing is a basic process in professional work management. It is about managing work demands effectively by making critical and tactical decisions about how to act. Three overlapping stages of *tactical balancing* have emerged. Demands are first assessed – which I have called *gauging* – and then dealt with through *calculating* and *acting*. The three stages of *tactical balancing* are interwoven, with few distinct boundaries between them, and they tend to occur concurrently. *Tactical balancing* is the dynamic and cyclical process of *gauging, calculating* and *acting.*

Gauging is about evaluating demands. It involves assessing the nature and extent of demands and weighing them against available resources, personal beliefs and professional judgement. *Gauging* sets the scene for thinking about and determining how to manage demands *effectively*.

Calculating is about planning for and shaping potential action based on the judgements made during the *gauging* stage. It is about being strategic when anticipating how and when to act. *Calculating* involves allocating priorities, cultivating relationships to professional ends and positioning to take advantage of potential opportunities that will transfer into the achievement of particular goals.

Comment [CMR1]: Not BSP?

RATHER – BALANCING. Put emphasis on balancing as the TC it is part of the paired opposite family. Still a process but not a BSP.

The process is cycling – which is part of the Process family (Not the cycling of the temporal family)

Comment [CMR2]: Includes STRATEGY family TC

And includes Moment capture TC (essential opportunistic action) (Which is an extension of the strategy family)

Comment [CMR3]: Or just manage their work/ Why does it have to be demands?

And is it manage or manage effectively?

Comment [CMR4]: Needs rewriting to include recent thoughts re cycling/dynamic equilibrium etc. See comment #1 above

Equilibrium is the outcome of some dynamic process (stability)

Dynamic equilibrium is stability/stasis

However, tactical balancing did not fully account for all the previously developed categories relating to the actual work learning advisors do: providing services, fostering relationships, promoting services and projecting identity. Tactical balancing seemed to explain how advisors carried out their work but did not account for or link all the properties of the 'work' categories in a way that integrated everything. I became frustrated at my inability to find the grounded theory structure and wondered if I had two core categories and therefore two theories. Glaser (2011) advises choosing one core category and leaving the other for another study if the researcher finds herself in such a situation, but I was reluctant to do so because I considered they belonged together and I just needed to discover the theoretical links. I returned to re-sorting memos and to reading Glaser's (1978, 1998, 2005) explanation of theoretical codes and coding families.

As I sorted, I started to notice memos proposing advisors' work was their role. In previous iterations of memo sorting I had noticed a number of memos about role, professional role, carrying out the role and managing the role. Memos also contained tentative suggestions of a relationship between role and the four 'work' categories. However, it was not until I read about the unit family of theoretical codes (Glaser, 1978) that I recognised the theoretical code 'role'. Once I recognised role as a theoretical code I read a selection of role theory literature (Biddle, 1986; Goffman, 1959, 1961; Hilbert, 1981; Lynch, 2007; Martin & Wilson, 2005; Merton, 1957) to clarify and confirm the fit of role as the theoretical code. Role, encompassing the expectations, activities and relationships that drive behaviour, as an abstract model of integration seemed to be a best fit in organising the categories and properties related to learning advisors' work. The theoretical code role provided a recognisable structure for the four categories relating to advisors' work and enabled me to refine and confirm those categories and their properties. The relationship between and among categories and properties was role. In carrying out their work (role performance), learning advisors are involved in providing services, fostering relationships, promoting services and projecting their identity. I reconceptualised the main concern as role performance and

proposed **tactical balancing** as the process through which learning advisors resolved the main concern.

Yet I was still bothered about **tactical balancing**, which did not fit as neatly as I thought it should. I was also unconvinced about **tactical balancing** being a BSP. Learning advisors were certainly being tactical in carrying out their role but I did not believe the theoretical codes 'balancing' and 'BSP' modelled their tactical behaviour well enough. While I proposed **tactical balancing** was a dynamic equilibrium, I remained suspicious. Balance implies also the opposite, imbalance, and there was little reference in the data and in my memos to imbalance. Glaser (2005) describes balancing to be where "one gets an equilibrium between all the variables. One can achieve a stasis for a time" (p. 29), but I had little evidence of learning advisors achieving or not achieving stasis.

The theoretical codes 'balancing' and 'BSP' seemed to organise the data well but in trying them out for size I believe I became seduced by their 'grab' (Glaser, 2005) and the notion of balancing as the way learning advisors managed their role. Accordingly, I went back and sorted my memos yet again. Through re-sorting memos, I came to recognise that the theoretical code 'role' also modelled advisors' tactical behaviour and was the link I had been looking for. Specifically, learning advisors enacted particular tactical roles in order to carry out their work (role performance). With this revelation I realised that two theoretical codes, strategy and role, modelled advisor behaviour and that together these two codes integrated the grounded theory. Generally, one theoretical code dominates in classic grounded theory, but people lead complex lives and so more than one theoretical code might be needed to model a grounded theory (Glaser, 2005). I understood then how confusion is a part of classic grounded theory analysis and that persistence coupled with conscious and subconscious processing fosters the emergence of a theoretical code. Instead of **tactical balancing**, it was **tactical enacting**; I had "move[d] to the core sideways" (Glaser, 1996, p. xiii). I could now see the overall conceptual framework around which the grounded theory could be built. Once I had discovered this, I went back and re-sorted memos to confirm the fit of the core category **tactical enacting.**

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The process of sorting memos and confirming the fit of the core category also led me to review my analysis. In reviewing analysis I began to realise that some categories remained descriptive and that I needed to lift the level of conceptualisation to refine the theory. As I worked to raise the conceptual level through rewriting I could see that the category *providing services* was too descriptive and narrowly focused. So too were aspects of *fostering relationships* and parts of *promoting services.* As I reflected on this lack of conceptualisation I noted that the names of these categories were not fully conceptualised either. Furthermore, I could also see that **tactical enacting** was more about generating role performance opportunities by cultivating and influencing staff, rather than students, and projecting the desired identity to get 'buy in' from the organisation.

In reviewing my analysis and revisiting some of the data I realised that advisor behaviour related more directly to staff and the organisation than it did to students. Having arrived at this realisation I then removed the category *providing services* entirely, rewrote the category *promoting services* to increase its conceptual level and renamed it *promoting,* and reframed the category *fostering relationships* by reconceptualising it as *building*. By doing this I was finally able to confirm the grounded theory of **tactical enacting**. **Tactical enacting** comprises the sub processes *cultivating* and *influencing* and the concepts *building, projecting, promoting* and *persuading* as illustrated in Figure 2. In sum, learning advisors express a concern about role performance and they resolve that concern through **tactical enacting**. **Tactical enacting** is a process through which advisors cultivate the relationships and role identity necessary for influencing others to accomplish role performance.
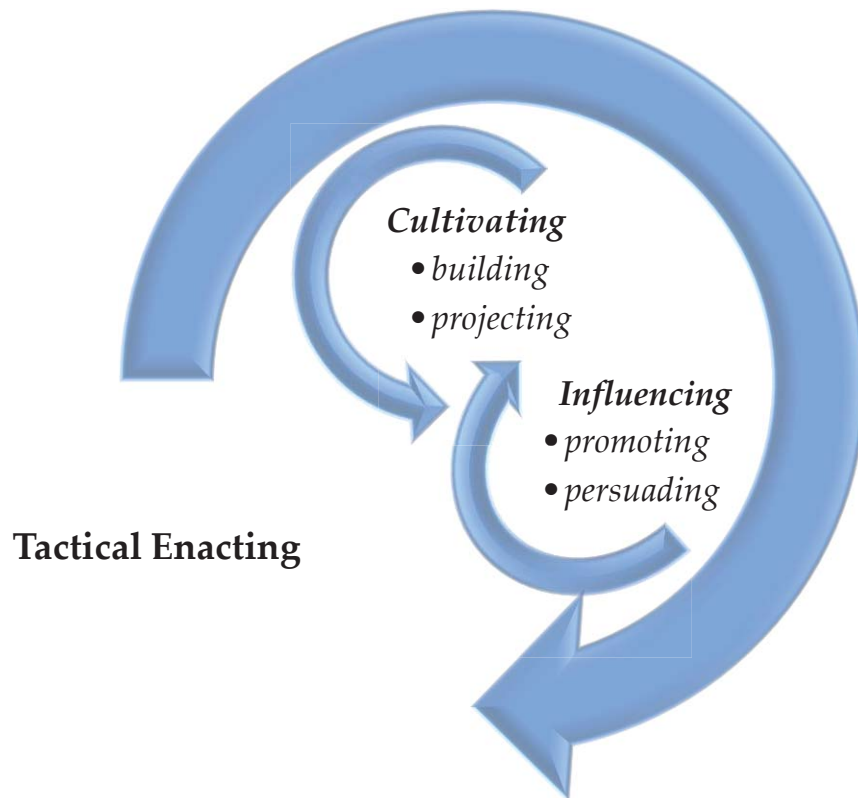
Figure 2. The theory of tactical enacting.

Having developed the grounded theory to this stage, I considered it robust enough to accommodate comparison with the literature (Glaser, 1998). The literature to review is itself emergent and cannot be predicted before discovery of the core category and the theoretical links amongst the sub-core categories (Glaser, 1996). Accordingly, I conducted a review of literature relating to the grounded theory's key concepts. I reviewed literature relating to role theory, interpersonal communication, ethics of care, professions, relationships, power, emotion, identity, marketing, management, and social exchange, and from the fields of education, sociology, business, marketing and psychology. The relevant literature was unanticipated and the review took me to unfamiliar fields. For example, I had not expected to be including business and marketing literature in the grounded theory. Having completed the review, I then began the process of weaving the relevant literature into the grounded theory.

Conclusion

Role performance emerged as the main concern of the learning advisors who participated in this research. Role performance is a conceptualisation and incorporates role, professional role, performing the role (carrying out their work) and managing the role. Analysis revealed that in order to resolve the main concern, advisors engage in **tactical enacting**. The grounded theory of t**actical enacting** is a process through which advisors cultivate the relationships and role identity necessary for influencing others to accomplish role performance.

The thesis continues with a presentation of the grounded theory. The emergent theory is based on several hundred pages of coded data and approximately two hundred and thirty sorted analytical memos, and is illustrated with direct quotations from the data.

Chapter four

The grounded theory of tactical enacting

Introduction

This chapter presents the grounded theory **tactical enacting**. Role performance emerged as the main concern of the learning advisors who were the focus of this research. The grounded theory of **tactical enacting** explains the resolution of this concern. The chapter begins with an overview of the grounded theory **tactical enacting** and continues by presenting the theory in two sections[7]. The first section explains the sub-process *cultivating* and the second the sub-process *influencing*. Each of the sections begins with a brief overview of the sub-process and continues with an explanation of its conceptual categories. In the first section, the sub-process *cultivating* and its conceptual categories *building* and *projecting* are explained via a presentation and discussion of each category's properties and dimensions. Similarly, in the second section, the sub-process *influencing* and its conceptual categories *promoting* and *persuading* are explained.

Empirically grounded conceptual indicators in the form of direct quotations from participant interviews (Glaser, 1998) are used to illustrate the conceptual categories and their properties and dimensions. Extant literature has been included in the analysis where appropriate as a further source of data producing additional properties or dimensions to expand the emerging grounded theory. Accordingly, the literature is cited throughout the chapter.

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[7] In this chapter the theory is named in bold text, sub-processes in italics bold text and the conceptual categories in italics text to help the reader recognise them as such.

Tactical enacting
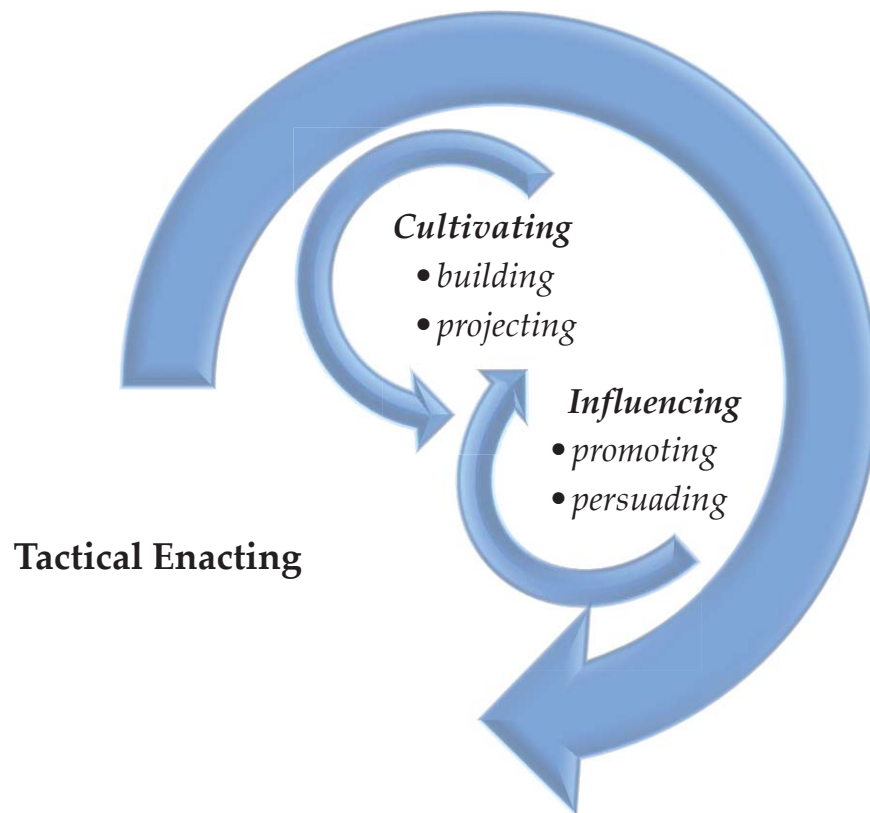
Figure 3. The theory of tactical enacting.

Overview

As explained in chapter three, the main concern, role performance, refers to learning advisors wanting to perform their role in a way that establishes its value in contributing to student and organisational success and secures its place within tertiary education. Concern about role performance is advisors' response to their work situation and expedient role performance is critical in an environment where advisors believe their role is undervalued and therefore insecure:

> I'd have to say that my role is undervalued really because I'm only on a yearly contract which is difficult, and it is part-time which also has some issues associated with it. I believe with all my heart that the management team here would love to employ me full time and permanently and I blame the

government for their fickle fiscal policies around tertiary education which make my life so unsettled. (AB, p. 364)

While supporting student success is a key driver of role performance, because "that's my role. That's what I'm here for. I'm here for students' success" (Z, p. 87), role performance that increases advisor visibility, establishes role value and secures their place, dominates thinking and behaviour. It is evident that in carrying out their role learning advisors have concerns related to their insecure work environment:

In the opinion of most learning advisors our role is undervalued and not well configured in most institutions. I've never heard anyone suggest that the institution might improve the way in which our role is configured. So I think I would have to characterise our wider environment as insecure because we don't feel that our role is valued in a way that guarantees our continued employment. (AA, p. 363)

In the theory of **tactical enacting**, the main concern, role performance, explains advisors' perceived ideal situation. The ideal situation is accomplishing role performance that delivers value to students, colleagues and the organisations within which advisors work such that it secures their role within those organisations. The main concern is the cause and motivator for the resolution process (Glaser, 1998). Therefore, the theory of **tactical enacting** is presented as a resolution process for concern about role performance.

Tactical enacting is a process of *cultivating* relationships and role identity and *influencing* others to accomplish role performance. *Cultivating* is the *building* and *projecting* that occur to create the relationships and role identity necessary for *influencing*. *Influencing* is the *promoting* and *persuading* that take place to generate role performance opportunities and in turn enhance *cultivating*. **Tactical enacting** occurs within the dynamic interplay of *cultivating* and *influencing*. The processes are interdependent and each generates and reacts to the other. **Tactical enacting** happens all the time.

Cultivating

Building
• relationships
• trust
• loyalty and reciprocity

Cultivating

Projecting
• aligning goals
• expertise
• affiliating
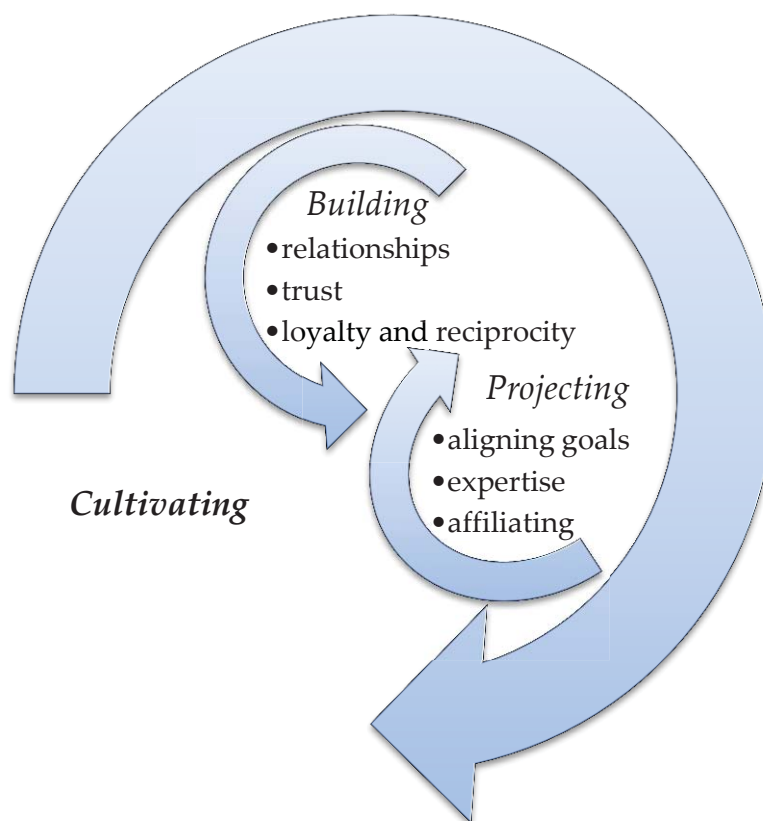
Figure 4. The sub-process cultivating and its concepts and properties.

Cultivating is defined as the *building* and *projecting* required for ***influencing*** and accomplishing role performance. *Building* is the ***cultivating*** of productive relationships and is enhanced by trust and rewarding interactions which together engender loyalty and reciprocity in others. *Projecting* is the ***cultivating*** of the desired role identity and relies on shaping and controlling perceptions by aligning professional goals with organisational ones, identifying and demonstrating expertise, and affiliating with positively regarded groups. Productive relationships and the desired role identity must be cultivated to accomplish role performance:

> It's sort of all tied up with cultivating the right relationships, you know,
> relationships with academic staff are really important. I mean, the key to
> working successfully with students is the relationship that you build with staff
> … and another thing that's a bit of an issue for us in our work is that most

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people on campus see us as something I would call a service centre of remedial work, so we have to cultivate the right kind of identity too. (K, p. 138)

Building

Building is the **cultivating** of the productive relationships necessary for accomplishing role performance:

> I think, one of the things we're finding important that we didn't realise was so important, is focusing on how we work with others. Being strategic and not just with students but by focusing on the way we work with tutors. We have to build good relationships with tutors so that they understand our role and work with us and tell others about us too. (R, p. 313)

Building facilitates role performance by producing networks of people who value their relationships with advisors, provide role performance opportunities and advocate on learning advisors' behalf. Networks of collegial relationships expedite role performance by increasing advisors' interpersonal power and their ability to influence others (Emerson, 1962). Increased interpersonal power and ability to influence helps sell role value and boosts the likelihood people will be open to overtures:

> The first thing I believe in to this day is that the relationship with staff is the short route to getting to the students. So if you can be a bit strategic and get the staff on board, by whether you work with them in the classroom, being on committees with them or getting in the union with them or getting on with them around campus and getting to know them at a sort of deeper level, you actually have a better opportunity of being invited into their classrooms and referred to the students. (B, p. 9)

Trust is an important element in getting people on board and for *building* the relationships necessary for role accomplishing role performance. The more opportunities there are to interact with others the more is the opportunity for trust to develop. Frequent interactions in which learning advisors explain, listen carefully and

are respectful establish them as trustworthy colleagues. Being a trustworthy colleague is a necessary condition for successful *cultivating* and high trust relationships enhance *influencing*:

> The academic staff need to know and trust that you are not putting too much input into [student work] because quite often, when you're working with the student it's related to one of the assignments they are doing in class, and so the staff need to understand what type of help you are giving the student. It's quite a high level of trust needed between you and the staff. (G, p. 58)

Trust is the belief in the integrity of the learning advisor. Trust strengthens relationships by reducing others' uncertainty (Dagger, Danaher & Gibbs, 2013) and is necessary for *building* the productive relationships that will generate role performance opportunities. Trust also triggers future action (Gustafsson, Johnson & Roos, 2006) and those who trust advisors will provide ongoing role performance opportunities. The absence of trust, however, undermines role performance:

> There are people who treat us with a little bit of distrust, and one thing is that we're not under academic staff contracts and I think in some cases that does make some academics a bit suspicious. You know, in terms of our credibility and understanding what we actually do, and so they don't consider us. So we have to build those relationships and get their trust. (P, p. 266)

Successful *building* increases trust and generates feelings of goodwill. Goodwill and trust become stronger as relationship length increases (Eastwick & Finkel, 2009). Ongoing productive relationships are rewarding and the more rewarding relationships are perceived to be, the stronger is people's commitment and the likelihood they will remain in the relationship (Rusbult & Kubacka, 2009). Relationship commitment and ongoing interactions also create relationship cohesion and in turn stimulate relationship loyalty (Lawler, Thye & Yoon, 2009). Relationship loyalty facilitates relationship maintenance (Dagger, David & Ng, 2011) which increases the likelihood people will be open to *influencing*. Loyalty expedites role performance because loyal

people themselves become open and responsive to *influencing* and in turn influence others to be the same:

> We've been trying to be a bit more strategic and get out there and interact more and get more familiar with academic staff and build some relationships … personally it's more fun and rewarding to get out into the classroom with staff and to have that better relationship and it helps develop a kind of loyalty in some staff who end up inviting us back and also persuade others to invite us into their classrooms. I guess we are being successful because we are interacting with staff more often and seeing more students and creating better relationships. (A, p. 1)

Building is also about ***cultivating*** relationships tactically:

> I'm actually in training sessions with academic staff. We're all together so you're crossing barriers. I originally went to these because it was part of the [employment] agreement and I had to. Now I go because I want to and it's a good tactic for networking and breaking down barriers and building relationships with the right people. (B, p. 13)

Building is time-consuming and the rewards are not always immediate, and so ***cultivating*** relationships with those who have the ability to influence others maximises time, effort and impact. Pursuing influential people with whom to build relationships is tactical because influential people have sway. People with influence play a part in determining whether or not the advisor role has value, and so *building* relationships with those people maximises advisor effort and optimises role performance outcomes. *Building* relationships with influential others results in those others communicating positive attitudes about the advisor role and expedites *building* effort by paving the way for productive relationship development more widely:

> Some are incredibly open and thankful for anything we can do to help them. And others don't want a bar of it. Some of it is the attitude that comes down

from the group leaders and depends on their attitude and idea of us, so I try to build relationships there. … and that's paid off with one particular person because now we have a great relationship and she's very good at bringing opportunities to my attention and getting actively involved. (A, p. 6)

Investing time and effort in *building* delivers significant rewards. Productive, collegial relationships engender "a readiness to act" (Dado, Petrovicova, Cuzovic, & Rajic, 2012, p. 207) as well as trigger *building* behaviour in others on advisor's behalf:

They would say, "Oh, others should come and talk to you", and I'd say, "Well, you need to tell them that." And that's often what I have happen the most. I'll have people come and say, "Oh, you're [N], oh I've heard about you," and so my name has been passed on. (N, p. 206)

Building is continuous and deliberate activity. Networks of productive and continuing relationships must be cultivated to accomplish role performance:

The more networks we build within people's Faculty the more opportunities we get to go into classrooms. We try to make it happen more often because we can see more students that way. The trouble is, if people leave, you know if course coordinators leave or lecturers leave, the continuity of that sometimes gets disrupted. We build up a good relationship with someone for a year or a couple of years and they go, and it's not passed on, and so we're back at reinventing the wheel. We're constantly working at building relationships because it is so important for us to do so. (P, p. 266)

Building is important work. Successful *building* cultivates networks of loyal people who value their relationships with learning advisors, provide ongoing role performance opportunities and advocate on advisors' behalf. People who provide opportunities and advocate for advisors also make a significant, positive contribution to successful *projecting;* successful *projecting* is essential for accomplishing role performance.

Projecting

Projecting is the **cultivating** of role identity and relates to shaping and controlling perceptions by aligning professional goals with organisational ones, identifying and demonstrating expertise, and affiliating with positively regarded groups. Successful *projecting* is necessary for **influencing** and critical to accomplishing role performance:

> As a practitioner it appears that one has to continuously justify the relevance of the learning advising role. It would be beneficial to self-examine our role and ask how can we be strategic and continue to keep our role relevant in times of change? How do we project the right kind of identity on campus? (V, p. 362)

Role identity is the result both of self-definition and of others' definition (Baker & Lattuca, 2010). While learning advisors hold a particular definition of themselves as members of their professional community, others' definition has important implications for role performance. Role identity relates closely to reputation and is what others believe or say about learning advisors; it influences how students, academic staff and their organisations behave towards them (Rodriguez, Tellier & Belanger, 2012) and how advisors themselves behave. From role identity comes "a sense of agency, of empowerment to move ideas forward, to reach goals or even transform the context" (Beauchamp & Thomas, 2009, p. 183). A robust role identity and a sound reputation facilitate role performance; a weak role identity and poor reputation compromise every aspect of it:

> I think that most university learning advisors, in my experience, consider that the wider institution does not really understand what they do. This is both frustrating and slightly worrying as there is often a sense that because we do not have a robust identity and the work we do isn't properly understood or valued by our institution there is more risk that the institution might choose to dispense with our role, at least as currently configured. (AA, p. 363)

Role identity is the identity learning advisors want others to recognise and accept and includes the knowledge, skills and values they want attributed to them. The desired

role identity positions learning advisors as legitimate experts capable of performing a valuable role effectively and contributing to organisational performance. *Projecting* is vital for accomplishing role performance and so advisors involve themselves in identity work. Identity work is about presenting the self (Goffman, 1959) and focuses on shaping and controlling others' perceptions (Schlenker, 2000). Shaping and controlling perceptions includes *projecting* the desired role identity and denying the undesired:

> That's something we're trying to shift. You know, that remedial sort of perception … the one where I'm seen as the good fairy with a magic wand and so we have to dispel the remedial-ness as well as the, you know, the fairy-ness. (H, p. 96)

Undesired role identity is often embedded in metaphors such as, "miracle workers" (O, p. 230), fixer (Golding et al., 2015) and Mrs Mop (Bishop, Bowman & Finnigan, 2009). Perceptions, particularly those that are metaphorically based, can be difficult to change (Emerson & Mansvelt, 2015) and so shaping and controlling others' perceptions is essential work:

> Perceptions about our role can be various and there are definitely some misconceptions out there so we need to think more strategically and make it very clear about our identity and our role in order to shift people's perceptions of us. (U, p. 361)

The drive to shape and control others' perceptions of learning advisor role identity is influenced both by the importance of "being seen as an expert and an equal" (F, p. 55) and by the fact that the role identity advisors wish to project differs from that perceived by others and the organisation:

> They don't see us as teachers, although we tend to say to people, we are academics and so on, but for me that's not enough, we have to prove to them

that we are academics, we are not technicians. But I think that is the dilemma
we are in. (Y, p. 71)

Learning advisors wish to project a role identity associated with valued outcomes
(Schlenker, 2000), such as those related to organisational performance, which "give us a
kind of credibility" (S, p. 338) and "help sell our identity and value" (Z, p. 87), and to
avoid those that project the opposite. There is a reciprocal relationship between
identity and behaviour (Cast, 2003), and so focusing on *projecting* through messages
that demonstrate commitment to and alignment with organisational goals is tactical:

> We must demonstrate a commitment to institutional objectives, like embedding
> literacy and numeracy, and ensure we know the correct language to be using to
> inform staff and the institution. It's really important and we make sure we tell
> people about how our services contribute to student retention and [our role] is
> therefore important to the polytechnic achieving its goals. (Y, p. 66)

Aligning professional goals and role identity with organisational goals enhances
reputation, and enhanced reputation is a precondition for people's willingness to
provide role performance opportunities (Helm, Liehr-Gobbers & Storck, 2011).
Drawing attention to achievements that align with organisational goals enables others
to recognise advisors' expertise. Achievements prove expertise and boost reputation by
demonstrating what learning advisors can actually do. Confirmation of expertise
projects the desired role identity and deflects the undesired. Expertise on its own,
however, is insufficient for **cultivating** the desired role identity. Expertise must also
show how learning advisors' specialised knowledge enables them to do what others
cannot (Kotzee, 2014).

Identifying similarities and differences between advisor expertise and that of others
helps distinguish and define the desired role identity (Goodrick & Reay, 2010).
Projecting seeks to claim a particular professional space through identifying differences
between advisor expertise and that of others and emphasising where advisor expertise
is greater:

It is important to delineate where learning advising expertise differs from academic subject expertise. The skills we teach students, that academics cannot, enable them to negotiate their subjects more effectively and while that often means a subject-specific approach, it is not subject content. (LD, p. 366)

The tutor said to me, "I haven't got the knowledge to do that" and I said, "Well, you will have in time," and she said, "No, it's your literacy knowledge and the knowledge of how people learn. I don't have that." (E, p. 36)

Illustrating points of difference so that others recognise they lack the requisite expertise, and using positive distinctiveness (Oldmeadow & Fiske, 2010) to convey how that difference is valuable, helps establish the desired role identity in people's minds. Once the desired role identity is firmly established and has a valued status and sound reputation, it is difficult for people to discount.

Demonstrating expertise is the most direct way of shaping and controlling perceptions and *projecting*:

Trying to overcome the perception that we can wave a magic wand or can fix things for students is challenging, but by going into the classroom and teaching alongside the lecturer I'm seen as enhancing student learning rather than fixing mistakes. (H, p. 95)

Learning advisors seek out and respond to opportunities to demonstrate their expertise and project the desired role identity by saying yes when asked:

To be asked to go into classrooms and do a specific workshop is a good opportunity to demonstrate our area of expertise, connect with lecturers and change some attitudes and sort of shape their perceptions of our role and so we tend to say yes to things. (O, p. 222)

Demonstrating expertise in this way creates an accurate perception of role identity. Furthermore, others' collaboration in the process reinforces the perception (Metts &

Cupach, 2008). Alignment between promised expertise and demonstrated expertise positively influences perceptions of role identity and strengthens relationships (Helm, Liehr-Gobbers & Storck, 2011). Strong relationships and proven expertise attract endorsements which help shape others' perceptions. The endorsement of others is a powerful tool for *projecting*:

> Recommendations from the lecturers have had an impact on my reputation. I have no immediate pressure from the senior leadership team to prove my value. They know that what I do makes a difference to student performance because the lecturers tell them directly. (E, p. 38)

Engaging in activities, such as research, that increase expertise and contribute to a distinctive body of knowledge is also a powerful way to shape and control others' perceptions and strengthen *projecting*:

> I think unless we do research, unless we can demonstrate that our practice is research based or evidence based, and get that message across campus-wide to our colleagues, lecturers and so on, I think it's very hard to convince them that we are academics. (Y, p. 73)

Publicising such activities widely through events such as presentations to staff reinforces expertise and leads to enhanced reputation and status:

> I was asked to do something for academic staff about the research I had just completed on academic literacy. That sort of thing makes all the difference in the world because it gives us a sort of credibility and status with staff. (E, p. 48)

Credibility and status strengthen learning advisors' ability to project the desired role identity and deny the undesired (McCall, 2003).

Affiliating with groups that are more positively regarded than advisors' own group also helps in *projecting* (Roberts, 2005). Affiliating is planned and deliberate:

> We deliberately took on every committee on the campus. We pushed for our place on the research committee and on the self-assessment community of practice, and [name] is on the academic board. You actually find a representative for everything within our Centre. (F, p. 52)

Making tactical alliances and affiliating with particular groups aligns learning advisor role identity with that of the targeted group and positively influences others' perceptions of advisor identity:

> By being on the research committee, academic staff view us as having research expertise and come to us for help with their own research. We've only been involved in the research committee this year but already it has helped change people's attitudes towards us. (C, p. 19)

Aligning with a targeted group's identity is non-threatening and represents a small win that helps counteract the impact of an undesired role identity, projects the desired one and positively influences learning advisor reputation. An enhanced reputation strengthens *projecting* efforts.

The process of *projecting* is continuous and incremental, characterised by the creation and achievement of small wins (Reay, Golden-Biddle & Germann, 2006). Achieving small wins moves advisors towards the larger goal of "reputational optimality" (Helm, Liehr-Gobbers & Storck, 2011, p. 4) – having their desired role identity recognised and confirmed as important within the organisation and within their set of professional relationships (Burke & Stets, 2009). A validated role identity, in tandem with networks of productive relationships, is central to the ***influencing*** agenda.

Cultivating is the deliberate and skilful process of *building* the productive relationships and *projecting* the identity necessary for ***influencing. Influencing*** relies on the existence of strong relationship networks and a validated role identity to generate and capture opportunities and accomplish role performance.

Influencing

Promoting
- visibility
- value statement
- selling value

Persuading
- solving problems
- collaborating
- performing favours
- opportunism
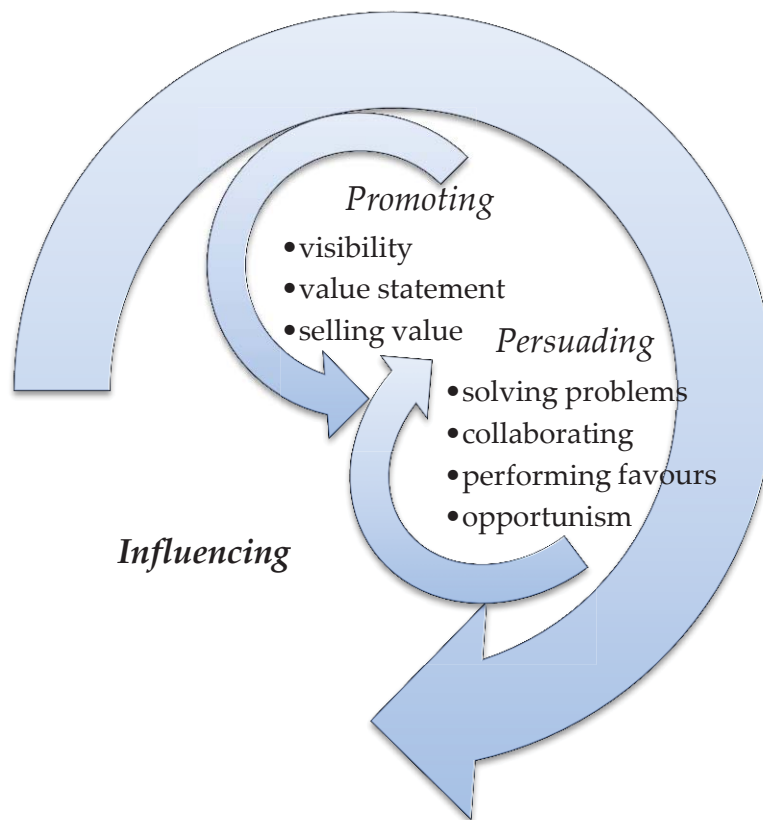
Influencing

Figure 5. The sub-process influencing and its concepts and properties.

Influencing is defined as the *promoting* and *persuading* that take place to generate and capture role performance opportunities. *Promoting* is about increasing visibility, articulating a clear and appealing value statement and selling role value to create the conditions necessary for ***influencing*** others. *Persuading* is ***influencing*** others by solving problems, collaborating, performing favours and being opportunistic. *Promoting* and *persuading* together enable ***influencing*** which is crucial for accomplishing role performance:

> We have to get out there and promote ourselves and get people on board, but you know it's a constant effort. You have to be continually thinking, how can we influence them and what can we do now to get to them? (M, p. 170)

In these times, we, the learning advising profession, need to be overtly proactive. It is a strategic moment for reflection and repositioning ourselves and asking how we keep ourselves visible campus-wide. How do we link what we do to some of the strategic goals of our own university, including engagement and retention? How do we increase our influence? (V, p. 360)

Promoting

Promoting incorporates a set of tactical activities designed to increase intra-organisational visibility, articulate a clear and appealing value statement, sell role value and generate role performance opportunities to increase advisor contribution to the achievement of organisational goals. Organisational performance expectations related to student retention and success in tandem with advisors' acknowledgement of not reaching all students highlight the importance of *promoting.* However, learning advisors are relatively underutilised, due in part to their poor visibility and perceived value, and so *promoting* is an essential task:

> The challenge in the current environment is establishing and maintaining our visibility, viability and value within our institutions … and if we can create a better image by linking what we do to student retention and success and promoting that then we have more chance of establishing our value beyond doubt. (AC, p. 369)

Surveying people to determine levels of visibility and perceived value amongst those who might provide role performance opportunities is a useful starting point in *promoting*:

> We wanted to increase our visibility around campus and find out what people thought we did so we had this idea to do a survey and what was really surprising was that a good percentage of people had no idea who we were, had never heard of us and had no idea what we did. Some thought we only did computers. None of us realised that many do not know about us and because of that discovery we have upped our marketing. (A, p. 6/7)

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Data gathering and then using results to target particular people is tactical and helps increase visibility and generate role performance opportunities:

> Last year we asked Institutional Analysis in our Registrar's office to get us the top fail and withdraw classes and then gave five-minute presentations on our study skills and tutoring service programmes to those classes. Our self-referral rate went up 324 per cent. (AC, p. 372)

Identifying where visibility is low and targeting those people increases role performance opportunities. Seeking out places in which to be visible also increases opportunities:

> I moved my office to a corner of the library and my window is near the main computer suite, and I often get questions posed to me through it. I am now seen as much more accessible and students remember that I am there. The number of casual drop-ins has increased fivefold since I moved. (AB, p. 362)

A presence in highly visible places is a tactical approach to increasing role performance opportunities and so visible places, such as classrooms, are deliberately targeted:

> I decided to pilot it to see how it goes and I'm just sort of sitting in the classrooms so the tutors are able to interact with me, the managers can see me and chat, and when the tutors have issues with students or have a concern they can come straight to me rather than go through a booking system, so it's more of an open door to me. It's been a very successful strategy and I now spend a lot of time in their classes which makes it a lot easier for them to ask me for help. (J, p. 113)

A classroom presence not only increases visibility and provides role performance opportunities but also results in word-of-mouth recommendations. Others' recommendations are important tools for *promoting*, and giving other people "good

stories to tell" (Nunn & Ruane, 2011, p. 293) positively influences their intention to make recommendations.

Communicating to a target audience via a range of communication channels, including mass, selective and person-to-person, is another effective way to increase visibility and influence people (Thomas, 2010). Mass communication channels provide the opportunity to reach large numbers:

> Once a year we literally spend our entire travelling budget on paying for the back page of the orientation magazine because it's given out free to all students and there are about 17,000 students. They only have to have it on the coffee table upside down to see our advert on the back page. And we've had good feedback from that and people saying, "Oh, I saw your advert in the student mag." (M, p. 166)

Selective communication channels, such as postgraduate student newsletters or new staff information sheets, allow more detailed and focused information to be given to the target audience than can usually be conveyed in mass communications (Thomas, 2010). Other selective channels, such as special events, increase visibility and have the added advantage of opportunities for interaction. A special event gives people the chance to ask questions and get detailed information and also allows advisors to convey their value statement:

> You can get a bad rap, a bad reputation, and so you spend a lot of time trying not to be seen as remedial. So I go to orientations whenever possible to make sure people get it from me that we're not remedial and that we can help students pass their courses. (Z, p. 95)

The learning advisor role is complex with a poor image and little evidence of tangible value. Intangibility suggests risk (Yagill, 2008) and results in people being uncertain about advisor expertise and value:

The need to continually promote and defend our role is an on-going frustration. Some academic and some management staff continue to have very little idea about what we actually do. This is in spite of the hard and consistent work we do to get our message out there and to raise our profiles. The fact that we are not academic staff can be a disadvantage when it comes to perceptions of the value of our role. There can be a certain snobbery attached to the academic versus the general staff divide at times. (W, p. 362)

Promoting must improve the role image and provide evidence of tangible value to generate role performance opportunities. Improving role image and selling role value is at the core of *promoting* and requires a clear and appealing value statement:

It's about getting out there and selling ourselves and being a little bit more proactive in some areas. In terms of selling yourself you've got to be clear about what you do and what you don't do. You've got to have an appealing image, you know, a sort of a value proposition, a fish hook. You've got to reel them in and have damn good bait too. (F, p. 55)

An appealing image, conveyed through a value statement, helps increase people's confidence and their willingness to provide role performance opportunities. Articulating a clear and appealing value statement and selling that value is critical to the success of *promoting*. A clear value statement conveys the correct role image and encourages people to provide role performance opportunities:

Being seen as remedial means people feel there's a stigma attached to it and that's a problem because they don't access us … we never use the word remedial now, we prefer the word transitional and we say, "Students are not remedial there's just a gap between where they've been and where they're going and we're just guiding them through that transition." Getting rid of words like remedial has made a big difference to the number of people who seek us out. (X, p. 60)

The value statement represents what learning advisors want their role to stand for, and a strongly articulated statement is the starting point and driver for *promoting* (Petek & Konecnik Ruzzier, 2013). Role performance is highly personal in nature, and so the personal approach combined with a strong value statement is a powerful tactic for *promoting* (Nunn & Ruane, 2011). A direct and personal approach in which a detailed, individually focused value statement is conveyed can be very persuasive and so opportunities to be direct are actively pursued:

> I wander round the queues and I've got a captive audience, they don't want to run away from it, they'll lose their place in the queue … and I chat to students about what we do, and say, "What subjects are you doing? Oh, we could help you with this." And one girl said to me, "Oh, I don't understand why I would want to go to you." And I said, "Oh, do you always get A+ do you?" And she said, "Well, that's not for people like me, you know, it's for the students who are stupid." And I said, "Far from it." I said, "Many of the students who use my services are thesis writing; I don't think you could call a PhD student stupid." (Q, p. 274)

Invoking a value statement and selling that value to individuals motivates people to provide role performance opportunities. People are more open to *influencing* when they perceive learning advisors to be knowledgeable and the advisor role to be of specific value. Specific value is related to the contribution the role makes to the achievement of organisational performance goals:

> I've found that building a robust evidence-base for our services and telling people about that establishes credibility with academics and the organisation and proves that our services work … it is easier to engage busy teachers if you've got evidence to suggest that working with you to develop students' skills makes their job that little bit easier and positively impacts student success. (LD, p. 366)

Selling role value increases the likelihood that people not only will provide role performance opportunities but in doing so will become advocates for the role and make recommendations to others. Converting people to advocates is an aim of *promoting* because advocates help sell role value and will persuade others to provide role performance opportunities:

> I'm only in the class because I get pushy and keep going to them all the time and saying, "Can I help you with anything or what would you like me to do?"… and I know they go and tell other tutors in their team as well; it does pay off. So a lot of it is word-of-mouth and being in people's faces. (N, p. 198)

Promoting is tactical and assertive and comprises a variety of activities designed to generate ongoing role performance opportunities by increasing intra-organisational visibility, articulating a clear and strong value statement and selling role value. Promoting that delivers increased visibility and a validated role value paves the way for successful *persuading*.

Persuading

Persuading is purposeful activity aimed at generating and capturing multiple and ongoing role performance opportunities. Persuading is about solving problems, collaborating, performing favours and being opportunistic. Solving people's problems, collaborating with and performing favours for them strengthens relationships and positively influences perceptions of role value which together create the conditions favourable for further persuading and capturing:

> A colleague mentioned some issues a new tutor was having and so I went and said to her, "Do you want me to come into your class and do a tutorial on how to actually complete an assignment?" and she just hugged me actually and said, "That would be marvellous." (K, p. 131)

Solving problems increases the probability of liking. Liking encourages reciprocal behaviour in people (Eastwick & Finkel, 2009) who then become more open to *persuading* and in turn persuade others:

> I get alongside them when they want to tackle an issue in the class and go and help them with it. So I use their expertise and I encourage them to use mine and it pays off because they'll invite me back into their classroom and pass on a good word to others. (X, p. 66)

People are more likely to trust and act on a recommendation when it comes from one of their peers who can attest to the fact a solution worked for them (Ng, David & Dagger, 2011). Solving problems by making sure solutions work for people maximises *persuading* and generates continuing role performance opportunities (Garoufallou, Siatri, Zafeirou & Balampanidou, 2013). A persuasive offer to solve another's problem is hard to refuse and puts people under some obligation to accept (Lee & Kotler, 2011). Targeting individuals by identifying potential problems and offering solutions, or by checking to find out if a previous solution was successful, is a very effective strategy for *persuading* them to provide further role performance opportunities:

> I try to go out and talk to every tutor in my school. Sometimes it's a quick phone call, or a coffee, or you know, just to touch base and say, "Hey I'm here and how did that last session work?" And "Do you need me for anything else?" I get a lot of work from that. (A, p. 5)

Solving problems and a 'meeting needs' orientation conveys a message of care and competence. Care, competence and genuinely trying to meet needs produce positive emotions in others and facilitates *persuading*. Meeting needs signals a commitment to others' interests and motivates people to reciprocate (Burger, Sanchez, Imberi & Grande, 2009) by seeking frequent interactions and providing role performance opportunities:

> Course tutors will seek us out and invite us into their classroom to address an issue. Or they might say, "Look someone's struggling" or, you know, they initiate help and send the students to us, or they say, "I haven't seen so and so this week will you get in touch?" (Z, p. 81)

Having their needs met increases others' perceptions of role value and strengthens relationship commitment. The more others value the role and their relationships with advisors the more they will provide role performance opportunities (Emerson, 1962). Relationship commitment and established role value create the conditions which facilitate *persuading* and increase others' willingness to accept opportunistic overtures.

Collaborating is another tactic used to persuade others to provide role performance opportunities:

> I think as learning advisers we have to be more strategic and see that things like in-context workshops and collaborating more with academic staff are really valuable and help us increase our reach … I find that the best way to show our competency and effectiveness is to collaborate with staff wherever possible. That can range from a brief consultation about what they're really looking for in a particular assignment to delivering team-taught workshops within their timetables or supporting them in developing more effective assessment processes. Often this starts with identifying problems that they need your expertise in overcoming and then good discussion. (LD, p. 366)

Collaborating is a way to draw others into problem-solving processes and establish joint control over solutions. The greater the joint control over solutions, the more likely positive emotions such as gratitude will be attributed to the learning advisor (Lawler et al., 2009). The more positive emotions attributed to the advisor, the greater is their ability to persuade. Increased ability to persuade creates favourable conditions for generating ongoing role performance opportunities.

Collaborating also increases others' trust in the learning advisor (Cheshire, Gerbasi & Cook, 2010). The degree of collaboration influences the degree of trust, and trust is a lever for *persuading*. High-trust relationships increase others' willingness to accept advisor overtures and are necessary conditions for successful *persuading*. Trustworthiness, in tandem with established role value, confers expert power (French & Raven, 1959) and increases interpersonal power (Emerson, 1962) which together strengthen the ability to persuade.

While collaborating and solving problems are effective in *persuading*, performing favours is also effective. Performing favours conveys a sense of special consideration granted out of goodwill and is a tactic for generating role performance opportunities. Willingness to do someone a favour conveys a helpful attitude that increases role value perception in the eyes of others and the likelihood they will respond positively to *persuading*. Performing a favour is a benevolent act and elicits positive emotions, like gratitude, in others (Lawler et al., 2009) which increases the probability of successful future *persuading*:

> Last term I had a tutor come and ask me to teach a bit of spelling and grammar to a group of 17 and 18 year olds and the time she gave me to do it was 1–3 on a Friday afternoon. I could have clobbered her. But the following week she said, "Well, whatever you did, worked." Now I know I have her forever. (F, p. 53/54)

Performing favours also produces reciprocal behaviour in others because the reciprocity norm encourages them to return favours (Gouldher, 1960). Performing favours that engender reciprocity helps achieve *persuading* goals because "you get champions in your academic community who help you by telling others" (Y, p. 65). Successfully performing favours also makes others amenable to future *persuading* (Cialdini & Goldstein, 2004). Amenability and reciprocity together advance the *persuading* agenda by increasing the probability that future role performance opportunities will be provided. People are more likely to agree to provide role performance opportunities and persuade others to do the same when they have previously received a favour (Burger, Sanchez, Imberi & Grande, 2009).

The reciprocity norm (Gouldner, 1960), positive emotions and perceptions of role value increase peoples' openness to *persuading*. However, while people may be open, advisors must still convince them by persistent *persuading* to generate frequent and ongoing role performance opportunities:

> So instead of having the people who elect to come to classes to increase their skills, we decided to focus on persuading the tutors, especially in the group programmes, to bring us in and work beside them. And that way we've had most of students rather than a few of the students and it has been really, really successful because they keep on asking us to come in. (B, p. 9)

Generating frequent role performance opportunities is more productive than generating infrequent opportunities because of the positive emotions that arise through regular interaction. Positive emotions produce affective ties that encourage commitment and loyalty. Committed and loyal people reciprocate and will persuade on advisors' behalf, thus maximising *persuading* efforts:

> I go regularly into one particular class and the tutor must have told her colleagues about me because after a while, others started to come to me and say things like "My fellow teacher has told me that you would come and do a session for my class. Would you?" (T, p. 345)

Persuading generates opportunities for role performance that enable learning advisors to demonstrate role value. The more opportunities to demonstrate and reinforce role value, the stronger and more collegial relationships become. Strong collegial relationships together with demonstrated role value are necessary conditions for successful *persuading* because they increase advisors' ability to influence others. The ability to influence others paves the way for successfully capturing role performance opportunities as they arise.

Advisors are opportunistic; they are perpetually alert to role performance opportunities and continually look for convenient occasions and promising situations

by gathering and processing information gleaned through their networks, prior experience and organisational knowledge:

> I'm the only learning adviser here for the campus and I think I have to be pretty flexible. I actively keep an ear to the ground around my networks to find out what's happening and if there's an opportunity then I'll be there … and I'm always looking for opportunities, you know, to kill two birds with one stone. (H, p. 96/97)

Using their networks in tandem with prior experience and organisational knowledge helps advisors recognise opportunities and position themselves tactically to capture those opportunities. Tactical positioning is also about placing their role in others' minds such that it occupies a distinctive place there. Distinctiveness increases the likelihood people will be open to *persuading* and facilitates opportunity capture:

> They recognise our area of expertise now and so we can go to them and say, "I'm consistently getting five or six students from your class asking the same questions, so how about I come in and work beside you in the classroom?" And they usually jump at the chance. (J, p. 119)

Being opportunistic, solving problems, collaborating and performing favours comprise the *persuading* aspect of the *influencing* process. Increasing visibility, articulating a value statement and selling role value make up the *promoting* aspect of *influencing*. *Influencing*, like *cultivating,* is deliberate and focuses on generating the conditions and opportunities necessary for accomplishing role performance. Together, *influencing* and *cultivating* are **tactical enacting.**

Learning advisors accomplish role performance by **tactical enacting***,* creating the conditions needed for optimal and sustained role performance. **Tactical enacting** is purposeful and aims to maximise role performance and optimise outcomes by delivering the relationships, role identity and opportunities necessary to do so. In

doing so, advisors are working tactically to secure their place by contributing to the achievement of organisational performance goals; in short, they perform.

Conclusion

The main concern, role performance, is learning advisors' response to their unstable work situation and the grounded theory of **tactical enacting** explains how they resolve this concern. While student success and advisor professional goals are drivers of role performance, it is performance that delivers value to the organisation that is the more significant driver and is tactically pursued. In **tactical enacting** learning advisors are working tactically towards a variety of ends. While student success is one of these ends, the more critical end is maximising their contribution to organisational performance goals. By maximising their contribution to organisational performance learning advisors are hoping to secure their place within tertiary education.

The thesis continues with chapter five, which presents a discussion of the grounded theory of **tactical enacting** via the application to the grounded theory of an analytical framework relating to Foucault's concept of governmentality. The grounded theory of **tactical enacting** is strongly performative and reveals organisational performance goals to be a powerful driving force behind advisor behaviour. Such a powerful driver of behaviour suggests that advisors are not just driven by the requirement to perform but are in fact governed by it. The extent to which the requirement to perform governs advisor behaviour begs to be examined more closely; Foucault's concept of governmentality provides an appropriate and illuminating lens through which to do so.

Chapter five

Discussion of the grounded theory

> If we recognize ourselves in Foucault's discourse, this is because what today,
> for us, is intolerable is no longer so much that which does not allow us to be
> what we are, as that which causes us to be what we are. (Morey, 1992, p. 125)

Introduction

The performativity culture of the contemporary TEO within which learning advisors
work, as discussed in chapter two, has a significant impact on how advisors perform
their role, and the grounded theory of **tactical enacting** clearly demonstrates the extent
to which performativity drives learning advisor behaviour. While the grounded theory
of **tactical enacting** reflects the discursive context from which it has emerged, further
discussion is needed to explain the complexities of the grounded theory and to
understand it fully. The work of Foucault provides "a set of effective tools for
intervening within contemporary discourses of power" (Ball, 2013, p. 4), and so I
employ an analytical framework related to Foucault's (1991) concept of
governmentality as a lens through which to discuss the grounded theory of **tactical
enacting.** The purpose of applying a governmentality framework to the grounded
theory of **tactical enacting** is to connect the macro-level realm of the performativity
organisation with the micro-level realm of learning advisor behaviour uncovering the
discursive forces operating in the contemporary TEO and to add a further layer of
analysis to the grounded theory for a more nuanced explanation of learning advisor
behaviour.

Foucault's concept of governmentality is a useful framework through which to
examine how, in **tactical enacting**, learning advisors are implicated in "techniques and
procedures for directing human behaviour" (Rose, 1999a, p. 20). Governmentality
provides the analytical tool with which to investigate not only how in **tactical enacting**

learning advisors are governed by performativity but also how advisors govern themselves and others in relation to performativity. The lens of governmentality will help illuminate how performativity is enacted by advisors in the everyday performance of their role. A focus on everyday enactments of performativity (Ball, Maguire & Braun, 2012) is particularly useful when analysing learning advisor behaviour as conceptualised in the grounded theory of **tactical enacting**, because such a focus positions performativity not as a force but as a mediated phenomenon (Ball et al., 2012). From the perspective of a mediated phenomenon, learning advisors, in **tactical enacting**, are positioned both as subjects of performativity and active agents in mediating and enacting performativity practices. The grounded theory of **tactical enacting** is strongly performative and therefore begs to be examined in more detail. Governmentality provides the analytical framework with which to examine the detail of the grounded theory as an effect of the discourse of performativity.

While the grounded theory of **tactical enacting** reveals learning advisor behaviour to be driven strongly by performativity and that advisors shape and make sense of themselves in relation to performativity, other drivers of behaviour are also evident in the grounded theory. These behaviour drivers include the standards advisors set for themselves and those which relate to the sort of professional they wish to be. Learning advisors shape and make sense of themselves in relation to their own standards as well as those of performativity.

Shaping and making sense of oneself – in Foucauldian terms, self-formation and the relationship one has with oneself – are central features of Foucault's (1997a) concept of ethics. The relationship advisors have with themselves along with the self-forming work they do can be glimpsed in the grounded theory of **tactical enacting.** For this reason Foucault's concept of ethics offers an additional tool to probe more deeply into how learning advisors make sense of themselves in the performativity organisation and to discuss how this process shapes their actions and self-evaluation.

My rationale for bringing Foucault's concept of ethics to the discussion of the grounded theory is not to propose that in **tactical enacting** learning advisors resist

performativity; it is evident they do not. Performativity is clearly normalised for advisors. However, in the light of Foucault's assertion that an ethics of the self is "not a blueprint for political action" (McNay, 2009, p. 67), my purpose in using Foucault's ethics in the discussion is to better understand the non-performativity drivers of learning advisor behaviour visible in the grounded theory and to determine whether or not in **tactical enacting** advisors "engage self-consciously in practices that might make her/him differently" (Youdell, 2006, p. 42) given the apparent absence in the grounded theory of advisor resistance to performativity.

A methodological note: While the philosophical position underpinning this research embraces a critical realist ontology, I argue this position does not conflict with Foucault's more relativist one for the purposes of this research. I have taken Foucault at his word when he says his work should "be a kind of toolbox which others can rummage through to find a tool they can use however they wish in their own area" (Foucault as cited in Nealon, 2008, p. 111). My philosophical position, which combines critical realist ontology with a pragmatist epistemology, provides space for the adoption and use of analytical tools which will "facilitate fruitful paths of human discovery" (Powell, 2001, p. 884). Furthermore, "Foucault is a realist" (Gauthier as cited in McKerrow, 2001, p. 6) and while realist in this sense is not the philosophically critical kind, I believe Foucault would approve of the pragmatic adoption of his tools to further my critical realist intention to "improve [my] interpretations of truth" (Cruickshank, 2003, p. 2) by discussing the emergent grounded theory through the lens of governmentality. Given the strong performativity nature of the grounded theory of **tactical enacting**, Foucault's concepts of governmentality and ethics provide appropriate, illuminative analytical tools with which to discuss the grounded theory and facilitate further discovery.

This chapter is divided into two sections. The first section briefly explains Foucault's notion of governmentality and the interrelated concepts relevant to the discussion; namely, discourse and ethics. Specific justification for using these concepts in discussing the grounded theory is included. Section two comprises two parts. The first part of the section argues that in **tactical enacting**, forms of governance associated with

the performativity discourse of contemporary TEOs (Roberts, 2013) within which learning advisors work are rationalised and put into practice by advisors. More specifically, that learning advisors govern themselves and others; that they both are made subject and subject themselves to the performativity discourse by actively constructing a performance identity and constituting themselves as the performing subject. The second part of the section argues that in **tactical enacting**, learning advisors act to reconcile the performativity discourse that disciplines and normalises them by fostering an ethical sensibility and disposition in order not to be governed by performativity alone (Myers, 2008).

Discourse, governmentality and ethics

The concepts discourse, governmentality and ethics are closely interconnected, but for clarity are explained separately in the following section.

Discourse

Foucault's concept of discourse is central to this analysis of the grounded theory of **tactical enacting.** Discourses, in Foucauldian terms, are particular ways of structuring, viewing and naming aspects of the world (Foucault, 1972); for example, political discourse, educational discourse. Discourses comprise mechanisms and practices that determine what counts as knowledge in a particular context, what can be said and how people can act (Foucault, 1972). In this study, performativity, which links learning advisor "effort, values, purposes and self-understanding to measures … of output" (Ball, 2012, p. 19), is the discourse.

Discourses construct their own particular truths and define acceptable behaviour. These truths and behaviours become the norms. Individuals internalise the norms, become normalised and thus view themselves and others through the lens of the discourse (Foucault, 1995). In describing the world in a particular way and normalising people's behaviour, discourses are a powerful force (Foucault, 1981). Though discourses are powerful, people are not passive objects of a discourse; they are able to resist (Foucault, 1981).

The framing of the performativity culture of contemporary TEOs, which is the context of this study, as a discourse is an important starting point in applying a Foucauldian analytical framework to a discussion of the grounded theory. Positioning performativity as a discourse helps clarify its nature and working practices in relation to learning advisors and how advisors, in **tactical enacting**, are discursively formed (Foucault, 1972), how they come to be constituted in particular ways by this discursive arrangement, and how they might resist.

Governmentality

Governmentality is Foucault's conception of how various techniques, structures and practices come together to control or influence people's behaviour in line with "particular sets of norms and with a variety of ends" (Dean, 2010, p. 18). Foucault (2002) refers to governmentality as "structur[ing] the possible field of action of others" (p. 341), which means, in this study, both the power of the performativity discourse to influence and control learning advisors and the power of advisors to influence and control themselves and others (Foucault, 1982). Individuals control themselves in relation to a particular discourse by engaging in practices Foucault calls technologies of the self. Foucault (1988) defines technologies of the self as practices individuals take up to shape themselves according to a particular discourse and which can be compliant or resistant (Taylor, 2011). Learning advisors shape themselves to the discourse of performativity in order to be discursively included.

Governmentality is all about governing people through "a subtle integration of coercion-technologies and self-technologies" (Foucault, 2007, p. 155) and is complex, widespread and exercised through intertwined systems and power relationships within and between organisations and individuals. The organisations within which learning advisors work require self-governing individuals who form themselves in accordance with the performativity discourse and enact its norms at the personal level.

The individual is of major interest to Foucault (1982), particularly how the individual fashions themselves as a subject within particular discourses – "how the subject

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constitutes itself in an active fashion through practices of the self" (Foucault, 1997b, p. 291). Foucault argues there is no essential subject already formed. He emphasises that the subject is not something people are or a state they occupy; rather, it is something they do – activities they perform (McGushin, 2011). The subject does not exist outside its context but is firmly embedded within its historical, social and cultural context (Foucault, 1982) and produced by the organisations, structures, norms and values of those contexts (Taylor, 2011).

Foucault's notion of the subject is a powerful concept through which to consider how learning advisors, in **tactical enacting**, fashion themselves in relation to the discourse of performativity. What is expected of them and what do they expect of themselves? How do they constitute and understand themselves within the discourse; how do they legitimise themselves? Do they use performativity to create new subject positions for themselves? Do they "refuse what [they] are … imagine and build up what [they] could be" (Foucault, 1982, p. 788)?

Foucault's concept of governmentality and notion of the subject can be appropriately applied to a discussion of the grounded theory because of their ability to expose how in **tactical enacting**, learning advisors might come to regard performativity as reasonable and workable, engage in its practices, rationalise their own behaviour and attempt to influence others'.

Ethics

Foucault's concept of governmentality is closely related to his understanding of ethics. Foucauldian ethics is about the relationship of self to self and how advisors constitute themselves as moral subjects by their actions (Foucault, 1997a). In this discussion I locate ethics within Foucault's concept of governmentality because of its concern with practices of the self as well as with practices of governing others (Dean, 2010). While these practices or technologies of the self (Foucault, 1988) act in a different way and do not supersede the disciplinary power of performativity, they still function as a form of

governmentality because the disciplinary power of performativity is not the only way advisors are governed (Foucault, 1997c).

Foucault's concept of governmentality makes space for the formation of the ethical subject in that the concept makes it possible to "bring out the freedom of the subject and its relationship to others … the very stuff of ethics" (Foucault as cited in Rabinow, 1997, p. xvii). The link between the relationship an individual has with themselves and the governing of others can be applied in this analysis to help understand the relationship of the learning advisor to themselves, their students and their colleagues. In order not to dominate others, advisors must think about what it means to be an ethical professional. The ethical professional is "one who exercises his [*sic*] power as it ought to be exercised, that is, simultaneously exercising his power over himself. And it is the power over oneself that thus regulates one's power over others" (Foucault, 1997b, p. 288).

Foucault's understanding of ethics is acutely relevant to a discussion of the grounded theory of **tactical enacting**. Learning advisors' education work is a moral activity (Pring, 2004); they have a code of practice and set of expectations related to their work and make moral decisions in respect to these every day. Applying Foucault's understanding of ethics to the grounded theory allows an in-depth examination of how in **tactical enacting** learning advisors make sense of their professional selves and how this process shapes their actions. Do advisors make decisions and act in ways determined only by the power relations of the performativity discourse in which they emerge (Lynch, 2011)? How do learning advisors respond to the discourse which disciplines and normalises them?

Foucault (1986b) describes five components of ethics: ethical substance, modes of subjection, self-forming activity, telos and ethos. Ethical substance in this discussion is defined as professional behaviour; more specifically, professional behaviour associated with moral action. Modes of subjection are the standards of behaviour learning advisors evaluate themselves against. Such standards include the quality of their

relationships and the extent to which advisors meet needs and expectations as reflected by student, colleague and organisational appreciation and approval.

The third component of Foucault's ethics, self-forming activity, relates to all the activities learning advisors carry out on themselves to ensure they perform their role ethically in line with the standards of behaviour they apply to themselves. These same standards also apply to telos, the fourth component of Foucault's ethical framework. Telos in this discussion relates to the sort of professional a learning advisor wishes to be. Thinking about and working on the sort of professional the advisor wishes to be helps them act ethically.

The fifth component of Foucault's understanding of ethics applied in this discussion is that of ethos. Ethos is "a way of being and behaviour" (Foucault, 1997b, p. 286) and is closely related to the concepts of telos and modes of subjection. Ethos is not action on the self (self-forming activity); rather, it is the visible manifestation of how learning advisors believe they should perform – how they appear and act publicly. In being so, ethos is a way advisors govern themselves – how they rationalise their performance in relation to the standards they set for themselves.

Applying Foucault's ethics to the discussion of the grounded theory will uncover whether or not learning advisors, in **tactical enacting**, resist the discourse of performativity, define and perform "acceptable forms of existence" (Foucault, 1997b, p. 283) and avoid "being governed quite so much" (Foucault, 2003, p. 265).

This first section of the chapter has presented a brief overview of, rather than an extensive engagement with, the key Foucauldian concepts used to frame the discussion which follows. The section has also provided justification for the use of these concepts by explaining specifically how each concept can be meaningfully applied to the discussion of the grounded theory of **tactical enacting** to achieve a more nuanced understanding of the grounded theory and its connection to the context within which it is enacted.

The chapter now turns to a discussion of the grounded theory via the application to the grounded theory of an analytical framework related to Foucault's concept of governmentality. The discussion uncovers governmentality in action and focuses on the way learning advisors, in **tactical enacting**, govern themselves in the performativity organisation within which they work. In governing themselves, advisors are not just subjects of the performativity discourse (hereafter referred to as performativity) they are active producers of their performativity identity and behaviour.

Tactical enacting: The performing subject

The contemporary TEO within which learning advisors work is changing their subjectivities and professional lives by engaging them in the practice of power and truth (Foucault, 1980, 1997a) that is performativity (Morrissey, 2015). Performativity subjects advisors to systems of regulation that require them to discipline themselves and perform to an array of "indicators and targets" (Ball, 2013, p. 137). In response to these requirements, learning advisors transform themselves into the performing subject. They readily become "the principle of [their] own subjection"(Foucault, 1995, p. 203) and perform accordingly:

> My job as a learning advisor is to support all students to be successful but politically we must show we're contributing to the organisation's goals. We put more emphasis now on keeping records about students' improving grades and then telling others about that. (H, p. 94)

The learning advisor as the performing subject embraces the possibilities of performativity not only because of the risk of being seen as irresponsible if they don't (Ball & Olmedo, 2013) but also because of the promise it holds for greater professional visibility (Foucault, 1995) and the construction of an identity which is recognised and valued by others and the organisation in which they work such that it establishes the learning advisor role as critical to organisational agendas (James, 2012). Performativity is "seductive as well as coercive" in promising "valued identities for those who

conform" (Lorenz, 2012, p. 618). A valued identity for learning advisors is one tied to performance; in effect, a performance identity. Visibility and a performance identity strengthen the advisor role and the performing subject organises themselves and their activities to achieve this end. Establishing a performance identity is important work and learning advisors pursue "the elusive sense of a secure self" (Clarke & Knights, 2015, p. 1) through continually seeking opportunities to demonstrate that identity and prove it is theirs:

> The issue from my perspective is for us to prove that it's a very important role we are playing on campus and to create the identity that we are not on the front line of the university or the periphery of the university but at the centre of student learning and retention. (Y, p. 74)

Advisors engage in performativity practices and subject themselves to performance measures, thereby enacting technologies of the self and disciplining themselves (Foucault, 1998). Thus, the performing subject establishes their sense of identity and meaning by engaging in the very practices that performativity elicits (Knights, 2002). Performativity makes the learning advisor visible through observation and normalising judgements (Foucault, 1995). In their drive for a performance identity, advisors unconsciously regulate themselves (Clarke & Knights, 2015). Performativity relies on ideal learning advisors who take up responsibility for meeting the demands of the performativity organisation (Davies & Petersen, 2005). The organisation's demands become advisors' demands:

> We're looking at the quality of our delivery and materials, because, you know, the funding, it all comes back to the funding regime which is particularly important at the moment. It used to be numbers, so everyone was open entry and concerned about the numbers, and now it's more about success and retention. And so we have to make sure they pass. (Q, p. 274)

The self-regulating advisor works on making themselves visible and valuable and exploits themselves fully as a "strategic possibility" (Veyne, Porter & Davidson, 1993,

p. 7). To become a strategic possibility, advisors engage in **tactical enacting** to increase role performance opportunities. Increasing role performance opportunities and the linking of role performance outcomes to organisational performance outcomes reveal advisors to be active producers of their own performativity. The performing subject, "intensely governed" (Rose, 1999b, p. 1) by performativity, engages in **tactical enacting** in order to increase visibility and establish and prove the performance identity. To help them do this, advisors internalise performativity norms and practices; they accept organisational performance goals as their own professional ones and highlight the successful achievement of those goals. Highlighting the achievement of organisational performance goals helps persuade others to provide role performance opportunities which enhances advisor performance and maximises their productivity (Rose, 1999b).

It is clear that learning advisors are making conscious decisions about where to focus their time and energy, most often with organisational performance outcomes in mind:

> A research project is a huge amount of work and you sort of think to yourself, well it's not the core part of my role and it won't be assessed so, you know, am I justified in doing it because it's not going to directly affect student success or retention. (Q, p. 289)

By focusing on organisational performance outcomes advisors transform themselves into perfect performing subjects, for "techniques of control work best when they make individuals want what the system needs in order to perform" (Thornborrow & Brown, 2009, p. 370). The performing subject is an obliging subject:

> There is a demand for tangible outcomes for students - retention and completion - and so we continue to update our record keeping, conduct annual student surveys which we reflect on and use to improve our services. We continue to discuss the way the university, government, TEC initiatives and policy will or might affect us. Our work directly feeds into supporting retention and completion and is therefore important to the university reaching its targets. (AC, p. 372)

Tactical enacting reveals learning advisor actions to be controlled by performativity in that advisors are compelled to be better performers for the benefit of students and their employing organisations, to continually improve their performance to this end (Rose, 1999a) and to want this for themselves. Performativity is seductive not only because it is in sympathy with some of learning advisors' professional values – for example, responsibility for and transparency about the outcomes of their practice (Lorenz, 2012) – but also because it offers them a way to achieve a performance identity. A performance identity renders advisors visible as key contributors to organisational performance, and consequently learning advisors embrace the subjectivity imposed on them.

Achieving a performance identity is a key task of **tactical enacting** and reflects advisor intent to transform the image of the remedial professional at the margins of organisational performance success into one of valuable professional at the centre of organisational performance success. Such intent demonstrates the extent to which learning advisors are constituted by performativity and constitute themselves as the performing subject. The performing subject transforms themselves in line with systems based on performance value (Ball, 2012). The notion of performance value is appealing because while performativity produces the performing subject, it also opens up new subject positions and opportunities for learning advisors to use towards their own ends. These ends include a performance identity and a role critical to organisational agendas (James, 2012). To achieve these ends, learning advisors realise they must do more than nominally perform, and so, as the performing subject, they become enthusiastic adopters of performativity practices**.** Performativity becomes part of who learning advisors are.

Learning advisors subject themselves to the discipline of performativity in order to be recognised as key participants in tertiary education and critical to organisational performance success. They act on themselves to display the requisite performing behaviours. They "take the necessary steps to document and quantify" (Fraser et al., 2010, p. 40) their contribution to organisational performance, promote the performance identity and differentiate themselves from others who perform less. Learning advisors

maintain themselves as the performing subject in order to be so recognised. Their activities serve as disciplinary controls through which their performance can be rated and their professional worth judged (Niesche, 2011). Performativity becomes normalised; it becomes a prescription for behaviour and must be followed (Foucault, 1995). Learning advisors internalise the norms of performativity and view themselves and others principally through this lens. Advisors come to see and accept that performing their role in ways that contribute explicitly to organisational performance makes them more effective. While performativity might put pressure on learning advisors, it is seen by them to be a good thing because it helps them improve their contribution to student and organisational performance:

> It's really important for us to reach as many students as possible because then we're more likely to have a higher retention and because retention and course completion is very important. You know, not just personally but the government, that's what they want. (N, p. 203)

In an environment where learning advisors are increasingly judged for their ability to contribute positively to organisational performance, it is not surprising they embrace performativity and its practices and perform their role in ways that maximise their performance and contribution. Performativity is a powerful force for learning advisors opening up a new subject position to them and a new pathway to success and security (Davies & Petersen, 2005). The new subject position of "optimally productive performing subject" (Morrisey, 2013, p. 798), or performer, is eagerly taken up and actively pursued through tactical self-presentation and promotion.

The grounded theory demonstrates governmentality in action. Tactical self-presentation and promotion are key activities in **tactical enacting.** The performing subject promotes themselves, courting visibility widely and assertively, and uses the language and artefacts of performativity to influence others so that more role performance opportunities are provided and advisor contribution to organisational performance is maximised:

> Communicating widely to faculties and staff about what we're doing is critical. We've found that building a strong evidence-base for interventions and collecting evidence to show that our services help students pass their courses establishes credibility with academic staff and is strategically sensible too. (LD, p. 360)

Not only has the organisationally desirable – increased productivity and achievement of performance goals – become the personally desirable, but the normalisation of performativity by advisors incites them to act to govern others. Governing others is a result of the responsibilisation of the self (Besley & Peters, 2007), which is linked to the 'everyone a performer' position of the performativity discourse.

In the current tertiary education environment, TEOs must prove they are doing their jobs and graduating high numbers of students in order to continue to receive funding. Learning advisors, as the performing subject, cannot admit to failing to contribute to this end (Davies & Petersen, 2005). Advisors, therefore, are positioned by the performativity discourse within which they are embedded to act not just on their responsibility for student learning success but also for organisational performance success. As the responsibilised performing subject to whom organisational performance outcomes have been distributed, learning advisors are ready to act to safeguard the organisation's funding and be cogs in the wheel of the organisation's success. Advisors "calculate about themselves" (Rose, 1999a, p. 215) so that they make the most of both their own and the organisation's performance:

> The student numbers have dropped and so the institution has been lowering the prerequisite a little bit. Some of the students have required more work because at some stage the institution has made it easier for them to start the programme. They come to me because they want to pass the paper and the institution wants them to pass. And of course so do I. (G, p. 56)

In responsibilising themselves, learning advisors also make themselves responsible for others' performance (Ball & Olmedo, 2013) and engage in **tactical enacting** to persuade

others to work together with them to maximise both parties' performance. While **tactical enacting** ostensibly is about persuading others to provide role performance opportunities to maximise advisor performance, advisors influence those others by pointing out how working together will maximise their performance too. In this way, learning advisors govern themselves and others:

> It's not too hard to persuade staff to work with us especially where they feel under confident in relation to learning development. But sometimes they are all too keen to step back and invite us in to do it for them. Personally I'd always rather do it with them because the closer we collaborate with them the better their subject expertise complements what we do and achieves better results for students and the university. So I always tell them that. (AC, p. 371)

The performing subject invests in themselves and acts tactically to maximise both their own performance and that of others and the organisation. Advisors are embedded in "networks of calculation" (Rose, 1999a, p. 214) which shape the ways in which they relate to and govern themselves and others. To maintain and develop themselves further as the performing subject, learning advisors engage in **tactical enacting** to strengthen their position and their performance. The fear of generating too few role performance opportunities, combined with the lack of a professional identity that demonstrates performance value to the organisation and those within it, threatens advisors' job security:

> It is not uncommon even for recently reconfigured centres to be restructured yet once again. We were last reviewed a couple of years ago but the threat still hangs over us. Restructuring is happening to other learning centres around New Zealand which is a worry for those centres and for the students at those institutions. I guess we all need to be mindful of what accountability and the need for belt-tightening might mean. (W, p. 363)

As a result, learning advisors make themselves visible through self-promotion to generate role performance opportunities and establish and confirm a strong

performance identity. The more role performance opportunities generated, the better is the chance students will complete their courses successfully, thereby contributing to organisational performance success. The more advisors persuade others to collaborate with them, the greater is the opportunity to perform. The more opportunities to perform, the stronger becomes their performance identity, which in turn helps embed the learning advisor role into the fabric of their organisations.

As the performing subject, learning advisors are governing themselves and others in new ways. They are engaging in activities that will result in increased opportunities to perform, both to contribute to student learning success and to secure their place in their institution. Advisors actively promote themselves and project a performance identity as protection against risk. Learning advisors must be seen as performers and their role defended as critical to organisational performance success. Within the performativity organisation, advisors are not only performing subjects but also tactical ones who continually seek to improve their performance and make themselves calculable (Ball, 2013) in order to survive. The calculating performing subject is not just engaging in new activities in the present but is thinking about what must be done to secure their place in the future. In the performativity organisation, learning advisors become personally responsible for their own and others' performance; they become responsible for generating continuing opportunities to perform, for organisational performance success and for their own job security. In sum, the learning advisor as the performing subject internalises the performativity discourse and governs themselves and others in their quest for increased visibility, a performance identity, the "pleasure of competence and accomplishment" (Roberts, 2005b, p. 624) and a secure place.

So far I have examined the grounded theory of **tactical enacting** through a governmentality framework exposing how learning advisors as the performing subject govern themselves and others in accordance with the discourse of performativity prevailing in TEOs in New Zealand today. In attempting to secure a particular subject position and place within tertiary education, learning advisors willingly engage in practices of performativity because of the increased visibility they afford, the professional identity they offer and the promise of security. Even though learning

advisors willingly engage in such practices, performativity is a potentially oppressive self-disciplinary force about which they must remain cautious (Foucault, 1982).

The possibilities of performativity seduce, coerce (Lorenz, 2012) and drive learning advisors to continue to constitute themselves as the performing subject, thereby regulating themselves and others. In this way advisors are conditioned to accept performativity as meaningful despite what they personally might think about it. In rendering themselves subject to the performativity discourse, are there possibilities for practices of freedom (Foucault, 1997b)? Do learning advisors challenge performativity and resist being what they have become through this exercise of power (Foucault, 1982)? Perhaps the performing subject acquiesces, which is not without its satisfactions and rewards (Davies & Petersen, 2005), and looks to the ethical subject for practice that is 'real'. Foucault, in his intent on revealing people to be "much freer than they feel" (Martin, 1988, p. 10), suggests the answer lies in part through ethical self-formation. The ethical subject, by fostering an ethical sensibility and disposition, and through ethical self-formation (Foucault, 2011), perhaps is able to create ethical spaces (Burchell, 1996) within which they can perform differently and not be governed by performativity alone.

The chapter now turns to Foucault's understanding of ethics to uncover ethics in practice and focuses on the way learning advisors, in **tactical enacting**, constitute themselves as the ethical subject and in so doing open up the possibility of not "being governed quite so much" (Foucault, 2003, p. 265) by performativity.

Tactical enacting: The ethical subject

As discussed in the preceding section, learning advisors as the performing subject seem to comply with rather than resist the discourse of performativity. In so far as performativity is normalised, its practices are hard to resist, not just because they offer opportunities for increased visibility and a performance identity, but also because of advisor reluctance "to rock the boat publicly" (Shore, 2008, p. 292). Consequently, learning advisors are complicit in sustaining performativity. In **tactical enacting**,

learning advisors do not appear to be disrupting the truth that is performativity, and I do not claim that they are. Rather, I argue that in **tactical enacting** advisors constitute themselves as both the performing subject and the ethical subject. The ethical subject responds to the truth that is performativity by performing their own truth alongside it (Bardon & Josserand, 2011) – by performing their role as an ethical project (Foucault, 1997b).

For Foucault (1997b), ethics is "the kind of relationship you ought to have with yourself … which determines how the individual is supposed to constitute himself [*sic*] as a moral subject of his own action" (p. 263). Ethics in this context, therefore, is to do with the relationship learning advisors have with themselves and the process of self-formation in response to the behaviours prescribed by performativity. Because their work is a moral activity (Pring, 2004), learning advisors are constantly making decisions in relation to performativity codes of action and behaviour, their own codes and those related to student and colleague expectations. In their everyday practice, advisors are involved in activities that require them to reflect and question and thus carry out ethical work on themselves for the good of students and the organisation. They continually reflect on and consider how they want to act in relation to others.

In **tactical enacting**, it is clear there are a variety of ways learning advisors constitute themselves as the ethical subject. While individual advisor telos, or the kind of professional they want to be, may differ slightly, their collective telos is evident in the grounded theory. The grounded theory of **tactical enacting** clearly identifies quality relationships, meeting needs and expectations, and enabling student success to be deeply ingrained in advisors' vision of the kind of professional they want to be and represent important components of the ethical subject's sense of self (Foucault, 1997a). Enabling student success is a powerful driver of behaviour:

> Students would sometimes come back and tell me about their results. One lovely student come back and sort of came flying through the door and he said to me, "Oh look I've got an A" and I said, "That's the best payback for me." Then he pulled out his wallet and he said, "I want to pay you" and I said, "No,

no, no, you don't need to do anything, this is the best thing for me that you've come in to tell me." Anyway he went away and came back with a cup of coffee for me and I never saw him again. He was a B student and he just needed a bit of a tinkering. (E, p. 38)

Advisors also want to be the kind of professional who enables organisational success. As the ethical subject, learning advisors regulate their behaviour so they can be this kind of professional, and the work they do on themselves determines the end result, or telos (Hofmeyer, 2006). That enabling organisational success is a component of learning advisor telos demonstrates the extent to which performativity has infiltrated advisors' sense of themselves and how the performing subject is absorbed into aspects of the ethical subject. Performativity becomes ethical work.

The quality relationships aspect of advisor telos emphasises an orientation of care:

They have to know you care and trust you can help them. Because we can't make it happen for them. All we can do is be there for them, be honest with them help them understand where they're at and provide guidance and support. You just have to care and understand because I want to see them take ownership of their learning; I want them to make the changes in their lives. And I sometimes tell students about personal details in my life when I came back as a mature student to be able to share that journey with them. And it's about them developing a pride in themselves, a pride in their work and being proud of who they are and what they're achieving. That's neat. (B, p.14)

An orientation of care, meeting needs and expectations and enabling student success reflects learning advisor commitment to students, colleagues and the organisation; of, "reaching students who need it the most" (U, p. 359), "collaborating with colleagues to identify problems and find solutions" (LD, p. 366), and "contributing to the university achieving its goals" (W, p. 360). While learning advisor telos shapes the way they perform their role, the performativity discourse within which they are made subject

also shapes how they perform. Consequently, advisors work on themselves to meet their personal telos and perform as the ethical subject (Foucault, 1997a).

Learning advisors judge their performance on the quality of their relationships and the extent to which they meet needs and expectations and enable student success as reflected by student and organisational appreciation and approval. Quality relationships and student and organisational appreciation and approval are powerful modes of subjection for learning advisors. In being so, these are the modes on which advisors carry out specific work on the self. Consequently, work on the self is guided by notions of interpersonal, emotional and professional competence:

> You've got to be emotionally and professionally competent and one of the risks of working with students who are stressed and anxious is burnout so I've been working on developing a more formal debriefing process. I've been considering peer supervision with other learning advisors and also supervision with other staff who work with stressed students, such as one of the counsellors or Disability Services advisors. (R, p. 316)

In terms of meeting organisational performance expectations, learning advisors engage with the mode of subjection that is organisational approval and carry out work on the self in order to gain that approval. Learning advisor ethical work here involves taking on responsibility to measure and report on the impact their role has on student performance, develop measurement competence, and "change measurement systems to ensure alignment with organisational requirements" (Morris, 2008). Advisors' self-forming activity consists not only of taking on the responsibility for recording and reporting student performance and developing the competence to do so, but also for promoting these outcomes as a means to increase visibility and claim a performance identity that enables them to generate more role performance opportunities, thereby contributing more strongly to organisational performance. By acknowledging they are contributing to the achievement of organisational goals, learning advisors are recognising that performance is an ethical substance they need to work on in order to

be the ethical subject. They reflect on and regulate their actions as a means of behaving ethically and improving outcomes for students and the organisation.

Clearly, the mode of subjection that is meeting organisational performance expectations and gaining approval is an important element in advisor ethical work. Just as important is the mode of subjection that is meeting students' needs and expectations and gaining their approval. Learning advisors perceive effective role performance to be about meeting needs and expectations and enabling student success:

> We're supposed to be guided by the policy which is a limit of four consultations a semester but I will do as many consultations as necessary to ensure there is a good learning outcome for the student. Just to give you an example, a Korean student who came to do teacher training, she was on the at-risk list which means that she would not be able to complete her teacher training because of language issues instead of skills issues. But she was very insistent, very determined that she wanted to do a teacher training degree and I offered to support her. And I supported her for three years and she got her degree. (Y, p. 68)

The drive to meet needs and expectations and enable success is both a mode of subjection and learning advisor telos. To be competent to meet needs and expectations and enable success, learning advisors engage in a variety of self-forming activities. These activities include continuing professional development and research, membership of ATLAANZ, and conference attendance to share practice and learn from other professionals:

> We have to think about our own self-development if we are to carry out our role effectively. We have to take advantage of development opportunities and support structures such as mentoring programmes and professional supervision if we are to ensure sure our work with students is effective and appropriate. (R, p. 310)

In order to meet students' needs and expectations and gain their appreciation and approval, learning advisors engage in **tactical enacting** to be visible and accessible and seen as competent and caring. In the telos of meeting needs and expectations, two powerful modes of subjection are in play and advisors evaluate their behaviour in relation to two main sources of performance criteria. These criteria are the appreciation and approval of students and the approval of the organisation:

> And it's so rewarding getting feed-back from students. One student said to me, "Talking to you yesterday helped. Today I'm much clearer because I'm less worried." Another said, "The support and caring from you is what's stopping me from dropping out." (U, p. 360)

> One of the things I used to hear a lot is that we can't easily prove the impact of our service on student performance, but in the recent Evaluation Review our Centre got 'Excellent', which is significant because it helps sell our identity and value to the organisation. (Z, p. 87)

Learning advisors have to decide which mode of subjection is applied at any given time. The more powerful may be organisational approval because it is that which has the potential for more serious professional consequences. How learning advisors prioritise their responsibilities to students and the organisation influences decisions about which is the more appropriate of the two judgements to apply in a particular situation. Advisors think about what is the most ethical behaviour from the two different perspectives and decide which has priority.

Learning advisors judge their performance on how effective they are in meeting needs and expectations as reflected in student and organisational appreciation and approval. They also judge their performance on the quality of their relationships:

> I care about how people are and my relationships with them. Personally I think it's a very western way of thinking that, you know, I have to be all brisk and professional and distant and deal with their academic issue and not worry

about the rest of them, because we aren't people like that … and if they say they need a hug, I'll give them a hug, and I don't consider that not to be learning advising. (K, p. 134)

Relationships constitute a powerful mode of subjection for learning advisors and consequently they carry out specific work on themselves to build and sustain the kind of relationships that enable them to meet needs and expectations. Advisors regulate their relationship behaviour according to criteria set by others in addition to themselves. These criteria are embodied in notions of care, competence, trustworthiness and proven role value. Learning advisors involve themselves in self-forming activities related to these criteria in order to constitute themselves as the ethical subject. Such self-forming activities incorporate self-reflection, recognition of competency gaps and seeking ways to fill those gaps:

> I've had quite a few students coming through this year who have low literacy levels and so I'm doing a course on teaching literacy to make sure I'm equipped to do the job and because it keeps me on my toes mentally. (P, p. 257)

Competence to do the job also involves emotional competence (Giardini & Frees, 2006), and learning advisors believe effective performance is about being emotionally competent "because it's people we're dealing with not just … their assignments" (L, p. 147). Emotional competence is an important personal resource for meeting others' needs and expectations. While emotional competence acts as a subtle technology of control on advisor behaviour, it is taken seriously as an important component of what it means to be an effective and ethical professional:

> I've always expected that the relationship with my students needed to be both affective and intellectual if it was going to help them develop into autonomous agents. I also know how valuable these relationships are and the value to students of being able to talk to someone who is not going to be assessing them. So I need make sure I'm emotionally competent and robust. (LD, p. 367)

The ethical subject has to manage their own emotions in order to respond to those of others. Learning advisors must work on themselves to maintain this ethical standard they set for themselves, and to this end they engage in a variety of self-forming activity. Such activity incorporates Foucault's (2005) notion of care of the self, and the ethical subject attends to themselves in order to attend to others. Advisors involve themselves in a variety of self-care activities to help them sustain the caring relationships they desire:

> I have started to use some resilience building techniques, for example, I have successfully used a grounding relaxation exercise when I've been a bit stressed … I'm working on incorporating more resilience concepts into my everyday practice and also sharing that with my colleagues. (U, p.359)

Care of the self is a constant attitude advisors take towards themselves in order to maintain quality relationships with students and colleagues over time.

In **tactical enacting**, learning advisors constitute themselves as the ethical subject and perform "a certain code of conduct and construct their own morality" (Bardon & Josserand, 2011, p. 507). In constituting themselves as the ethical subject, advisors are governed by ethical substance, modes of subjection, self-forming activity, ethos and telos. Learning advisor telos revolves around quality relationships and meeting the needs and expectations of students, colleagues and the organisation. In their relationships, advisors emphasise an orientation of care and trust, emotional competence and acting professionally. In their telos of meeting needs and expectations, notions of commitment, collaboration and contribution are of particular importance. Learning advisor telos represents a powerful component of the ethical subject's sense of self.

In **tactical enacting**, advisors' modes of subjection – the standards of behaviour they evaluate themselves against – comprise the quality of their relationships and the extent to which they meet expectations and needs as reflected by student and organisational appreciation and approval. To ensure they perform their role ethically in line with

these standards of behaviour, advisors involve themselves in a variety of self-forming activities.

The contemporary TEO within which learning advisors perform their role is not one of discursive determinism, but of discursive struggle where things are constantly changing and where there is space for resistance (Foucault, 1997b). However, while the ethical subject seeks small spaces within the discourse of performativity to recognise and act on the possibility for resistance – for example, ignoring rules around the time allocation for student consultations or providing discretionary services and attracting negative criticism – learning advisors, in **tactical enacting**, are largely complying with and reproducing the discourse rather than resisting it.

Embracing their ethical subjectivity is considered by advisors to be critical for performing their role effectively. Embracing their performing subjectivity is likewise critical. The performing subject works tactically from a position of value to be visible, valuable and secure the learning advisor place in the organisation. The ethical subject works strongly from a position of values to be true to advisor professional ethos and maintain an orientation of care and commitment to students and their learning and to the organisation. The terrain of ethics learning advisors engage in on a regular basis in **tactical enacting** is constantly shifting. This shifting terrain involves advisors in ongoing and deliberate work on themselves – the "development of a … government of the self and an elaboration of an ethics and practice in regards to oneself" (Foucault, 1997d, p. 116) that enables them to perform their role in as truthful and authentic manner as possible given the normalising effects of performativity.

However, the normalising effects of performativity mean that in **tactical enacting** learning advisors are largely complying with and reproducing the performativity discourse rather than resisting it. Resistance is ill-advised in the unstable work environment that is learning advisor reality:

I'm on a fixed-term contract and I don't know if I'll get another contract at the end of this one and so my employment status is very uncertain. There's no guarantee. And I know it's the same in other learning centres. (M, p. 178)

This unstable environment with its demand for performativity means learning advisors must work tactically if they are to secure their place within it. Securing their place is the overarching driver of advisor behaviour and balancing their own professional goals with organisational goals in the quest to secure their place is the key challenge. In the attempt to balance goals advisors constitute themselves both as the performing subject and the ethical subject. While constituting themselves as both the performing and ethical subject may be a way to reconcile and balance the two goals, advisors are constrained to a large extent by organisational goals and their employment conditions.

The performing subject is prominent both in the theory of **tactical enacting** and in the literature. The literature, as discussed in chapter two, reveals the extent to which learning advisors and their professional organisation ATLAANZ have aligned themselves with tertiary education's performance expectations. I have suggested in the chapter that ATLAANZ and learning advisors have aligned themselves with tertiary education goals because those goals are viewed as common sense by advisors. However, it must also be acknowledged that learning advisors perhaps have little choice but to align themselves thus because of the undervaluing of their role, their unstable work environment and the importance to them of securing their place (Fraser, et al., 2010). In short, learning advisors would seem unable to resist the performativity discourse because the stakes are too high.

The need for job security has infiltrated advisor's sub consciousness and sense of themselves and coerced them into accepting the performativity discourse as their own. Performativity is who they are:

Wider knowledge about, and appreciation of, the impact of tertiary learning advising on student retention and success is important on a number of different

levels. It is crucial to the longer term survival and development of the tertiary learning advising profession. It is vital towards enabling tertiary institutions to more effectively and reliably meet their student retention and completion requirements. It is one significant factor in the attainment of national agendas on tertiary education outcomes. (Fraser, et al., 2010, p. 41)

In accepting the performativity discourse as their own they become the perfect performing subjects and tertiary education superheroes; there is little chance of escape if they want to hold on to their jobs:

The [tertiary education] super-hero conforms to university strategic priorities … and is always alert, if not alarmed. At any moment our hero must be ready to deal with the multiple uncertainties that beset the higher education sector. (Pitt & Mewbum, 2016, p. 99)

Conclusion

Applying a governmentality lens to a discussion of the grounded theory of **tactical enacting** has revealed that while not without its tensions, learning advisors seem able to act to reconcile, rather than resist, the performativity judgments that define their value and determine who they are and how they should behave (Foucault, 1983) with their own by retaining the right to define themselves and behave according to their own judgments and values. This outcome aligns with evidence from the review of learning advising literature which forms part of the contextual overview in chapter two. This literature also reveals that learning advisors seem able largely to act to reconcile organisational performativity value with their own professional values. Maintaining professional values, such as a commitment to students and their learning and being professionally accountable to students, can help mitigate the impact of performativity on learning advisor behaviour (Canaan & Shumar, 2008).

In the early section of this chapter, when justifying the use of Foucault's concept of governmentality to analyse the grounded theory of **tactical enacting**, I asked if

learning advisors "refuse what [they] are … [and] imagine and build up what [they] could be" (Foucault, 1982, p. 788) by engaging ethical subjectivities. The answer is no, they do not. Rather, advisors act to reconcile the performativity discourse which disciplines and normalises them by fostering an ethical sensibility and disposition in order not to be governed by performativity alone. How successful they are in not being governed by performativity alone is a moot point. Performativity seems to have infiltrated advisors' sense of themselves and the performing subject is absorbed into aspects of the ethical subject. Performativity becomes ethical work. There is little evidence that advisors are sceptical and questioning of performativity at either the individual or organisational level.

In **tactical enacting**, learning advisors are subject to a "complex assemblage of diverse forces" (Miller & Rose, 2008, p. 63) that produce normalising rather than resistive effects. The normalised learning advisor willingly adopts performativity practices and constitutes themselves as the performing subject because it is in their best interests to do so. The turbulent environment in which they work coupled with the instability of their employment coerces them to perform. However, in an effort not to be governed by performativity alone, advisors also constitute themselves as the ethical subject and govern themselves according to their own standards of professional behaviour. The particular subject position at play in any given situation is guided by individual advisor ethos and by how they wish to be and to behave in that particular situation. Advisors must decide what holds sway; is it organisational value or professional values (Ball & Olmedo, 2013)? I suggest organisational value and professional values are quite likely to be the same thing.

Chapter six presents conclusions from the study and offers recommendations for practice and suggestions for future research.

Chapter six

Conclusions

> Educational researchers must be willing to experiment with new truths. (Butin, 2001, p. 174)

Introduction

In the preceding chapters this thesis has introduced the research problem (chapter one) and provided a contextual overview of the contemporary tertiary education environment in New Zealand within which the research takes place (chapter two). Chapter three has presented an overview of classic grounded theory as the chosen methodology, discussed the design and conduct of the research, and given a detailed description of the conceptual development process. The grounded theory, **tactical enacting,** which emerged from the research has been set out in chapter four. Lastly, chapter five has discussed the grounded theory of **tactical enacting** via the application to the theory of an analytical framework related to Foucault's concept of governmentality.

This final chapter offers conclusions from the research. The chapter begins with an overview of the research findings before moving on to consider the contribution the research makes to practice, research and method. Recommendations for practice and potential areas for future research are offered at appropriate intervals throughout the discussion on the research contribution; conclusions regarding the research approach are also presented here. The chapter then comments on achievement of the research aims, evaluates the research findings and addresses limitations. The chapter concludes with a personal reflection on the research.

Overview of the research findings

The grounded theory of **tactical enacting** and the application to the grounded theory of an analytical framework related to Foucault's concept of governmentality together yield the findings of this research.

Role performance emerged as the main concern of the learning advisors who were the focus of this research. The grounded theory of **tactical enacting** explains the resolution of this concern. In **tactical enacting**, learning advisors are working tactically towards a variety of ends. These ends include a performance identity and a role critical to organisational agendas. A role that is critical to organisational agendas is one which makes a significant contribution to student success outcomes and organisational performance. Making a strong contribution to student success and organisational performance helps learning advisors construct the desired professional identity for themselves and establish their role as valuable in the eyes of others and the organisation. **Tactical enacting** means advisors perform their role tactically in order to meet their own professional standards as well as the needs and expectations of students and the organisation and to help secure their place within tertiary education.

However, in **tactical enacting**, learning advisors constitute themselves as the performing subject, subject to and subjecting themselves to the performativity discourse of the contemporary TEO. At the same time, in **tactical enacting**, learning advisors constitute themselves as the ethical subject and perform as "a moral subject of [their] own actions" (Foucault, 1997a, p. 263) in an effort not to be governed by performativity alone. The performing subject and the ethical subject move along a continuum between value and values (Ball & Olmedo, 2013). The former produces the performing subject whose qualities are defined and judged by performativity standards of behaviour; the latter produces the ethical subject, defined and judged by learning advisor standards of behaviour. The ethical subject, in tactically enacting their role in line with their own standards, is processing the question of who they want to be in an effort not to be determined only by the performativity discourse (Foucault, 1982). Constituting themselves as both the performing and ethical subject assists learning

advisors to act to reconcile the performativity and professional drivers of their behaviour, "avoid being governed quite so much" (Foucault, 2003, p. 265) by performativity, and perform their role in a way that meets organisational, student and their own expectations of how they should behave.

However, despite tactically enacting their role in line with their own standards of behaviour in the attempt not to be governed by performativity alone, advisors are largely unable to act outside the performativity discourse except in minimal ways; they are unable to resist the discourse because the stakes are too high. Whether or not advisors are fully aware of the extent to which they are governed by the discourse or, indeed, the extent to which they are free agents able to embrace the subjectivity imposed on them and use it to their advantage without being governed by it, is a moot point.

Performativity seems to have infiltrated advisors' sense of themselves and the performing subject is absorbed into aspects of the ethical subject. Performativity becomes ethical work; performativity becomes who advisors are. There is little evidence that advisors are sceptical and questioning of performativity at either the individual or organisational level. However, it is imperative they maintain a critical stance to the present (Foucault, 1972) and be sceptical and questioning if they are to reconcile their performing and ethical selves, not be governed by performativity alone and be the kind of professional they wish to be.

Contribution to knowledge

Classic grounded theory is an ideal methodology for uncovering people's empirical reality; it assumes people lead complex social lives and so are solving important problems all the time (Glaser, 1978). Classic grounded theory provides a theoretical explanation of how people solve those problems and, therefore, holds promise for producing a clear picture of what actually is (Simmons, 2011). In producing a clear picture of what is, the resultant grounded theory becomes open to the application of an

analytical framework related to Foucault's concept of governmentality, leading to a more nuanced explanation of empirical reality.

Through such a twofold approach, this research makes a significant contribution to knowledge in three main areas. Firstly, the research contributes to knowledge and practice in relation to professional roles and organisations; specifically, the professional learning advisor role in the contemporary TEO in New Zealand. Secondly, the study contributes to research; specifically, to the scholarship of learning advising. Lastly, the research makes a contribution to research method; specifically, to classic grounded theory methodology, and to an approach that applies a Foucauldian analytical framework to a discussion of an emergent grounded theory. The research contribution to practice, research and method is discussed separately in the following section; recommendations for practice and potential areas for future research appear at the end of the relevant discussion.

Contribution to practice

The contribution this research makes to practice is twofold. The first contribution has been achieved through the use of classic grounded theory methodology to produce a grounded theory that explains what is going on for learning advisors and offers them a way to understand and resolve significant concerns. The grounded theory of **tactical enacting** provides advisors with a way to understand their role and develop action strategies to help exert a level of control over it (Glaser & Strauss, 1967). The grounded theory contributes to learning advisor practice by raising awareness and offering insights into the practical value of performing their role tactically. In addition, the grounded theory offers specific suggestions for tactical behaviour which could help learning advisors develop a wider range of tactics than might be in their existing personal repertoire and increase their "flexibility and scope of action" (Glaser & Strauss, 1967, p. 247). A wider scope and increased possibilities for action will assist advisors in meeting their own professional standards, as well as the needs and expectations of students and the organisation, more effectively than they may have been able to do in the past.

Although the grounded theory of **tactical enacting** explains what is going on for advisors and identifies some of the drivers of professional behaviour in the performativity organisation, it does not explain all of them. Thus, the second contribution this research makes to practice is its explanation of how, in employing a tactical approach to role performance, learning advisors constitute themselves both as the performing subject and the ethical subject in order to perform their role in a way that meets student, organisational and their own professional expectations of how they should behave. The particular subject position at play in any given situation is guided by individual ethos and by how advisors wish to be and to behave in that particular situation and what takes precedence: organisational value or professional values (Ball & Olmedo, 2013). This second contribution has been achieved through the application of an analytical framework related to Foucault's concept of governmentality to a discussion of the strongly performative grounded theory of **tactical enacting.**

The application of this framework to a discussion of the grounded theory offers a more nuanced explanation of what is going on for learning advisors than the grounded theory does on its own. A more nuanced explanation contributes to practice by raising advisor awareness of the influences at play in the performativity organisation, how those influences impact on the way advisors perform their role and of the opportunities the situation offers. The research findings make visible the different ways performativity creates learning advisor subjectivities and helps advisors understand not only how performativity's discursive practices shape them but also the role they play themselves in shaping their own subjectivities. By increasing advisors' understanding of the discursive practices in play and how they are shaped by these practices and how they shape themselves, the possibilities for not being governed by performativity alone can be glimpsed. These possibilities lie in maintaining a critical stance to the present (Foucault, 1972) and in ethical self-formation (Foucault, 2011) – in fostering an ethical sensibility and disposition in order to create ethical spaces (Burchell, 1996) within which to perform differently and not be governed by performativity alone.

Performativity is clearly normalised for advisors and there is no evidence in the grounded theory that they resist it. Rather, resistance, for learning advisors, is more about achieving a place of less domination within the performativity organisation than against the organisation; ethical self-formation helps them achieve that place. The ethical subject is constituted through practice; it is an achievement (Mendieta, 2011) and there is work advisors can do – deliberate self-formation – in order to perform their role in line with the standards they set for themselves. The research findings describe some of the self-forming activities in use, for example, self-care, developing competency where gaps exist, continuing professional development and research, and in doing so provide learning advisors with a toolbox of activities to call on. The findings show learning advisors how working on the self to constitute themselves as the ethical subject may help them achieve "an ethics of control" (Foucault, 1986a, p. 65).

This research, in demonstrating the ways in which learning advisor subjectivities are created, shows advisors how they can be both the performing subject *and* the ethical subject. How, despite accepting the requirements of performativity, they can still be the kind of professional they wish to be – the kind of professional whose care for students and commitment to their learning remains at the centre of their work.

Despite being subject to performativity and constituted as the performing subject, this research suggests learning advisors perhaps can be "freer than they feel" (Martin, 1988, p. 10). The research findings give some direction to advisors on how they could be freer; specifically, by showing advisors how to use the discursive spaces made available to them to increase visibility and construct their desired identity without abandoning their professional ethos. This research provides a clear picture for advisors of the limits and opportunities of the discursive structure operating in the contemporary TEO. In providing a clear picture, the research enhances advisor understanding of the constraints within which they work and offers them a guide for acting more freely within it (Dean, 2010). The research argues that learning advisors can use some of the performativity practices operating in the organisations within which they work to their advantage, yet remain true to their professional ethos.

Tactical enacting shows them how they can do this and how they can act to reconcile both the performative and professional drivers of their behaviour.

In **tactical enacting,** learning advisors are subject to a "complex assemblage of diverse forces" (Miller & Rose, 2008, p. 63) that produce normalising rather than resistive effects. The normalised learning advisor willingly adopts performativity practices and constitutes themselves as the performing subject. However, in an effort not to be governed by performativity alone, advisors also constitute themselves as the ethical subject and govern themselves according to their own standards of professional behaviour. The particular subject position at play in any given situation is guided by individual advisor ethos and by how they wish to be and to behave in that particular situation. Advisors must decide what holds sway; is it organisational value or professional values (Ball & Olmedo, 2013)?

The overarching contribution the research makes to learning advisor practice is in showing advisors that by performing their role tactically yet ethically they can use organisational performativity requirements to best advantage to help secure their place in the organisation and continue to deliver effective advising services to students. The research provides learning advisors with some understanding of how to anticipate and resolve their professional concerns on a day-to-day and ongoing basis.

In considering the contribution this research makes to learning advisor practice, four recommendations are offered. These recommendations relate to being tactical, being sceptical and questioning of performativity, strengthening ethical self-formation, and using performativity requirements to help secure the role of the learning advisor in tertiary education. While none of these recommendations comprises new behaviour for learning advisors, because all are embedded in the grounded theory, the recommendations are a call to strengthen specific behaviours for advisor benefit.

Recommendation one

That learning advisors adopt a more tactical approach to their everyday work in order to generate opportunities for role performance. Increased opportunities for role

performance maximises advisor contribution to student learning, their own professional goals, and organisational performance goals, and helps secure their place within tertiary education.

Recommendation two

That learning advisors maintain a critical stance to the present (Foucault, 1972) and take up what arguably is a professional responsibility to be sceptical and questioning of performativity at both the individual and organisational level.

Recommendation three

That learning advisors utilise a critical stance to the present (Foucault, 1972) and strengthen their ethical self-formation work so as to perform their role more self-consciously in line with the standards they set for themselves and to avoid being governed by performativity alone.

Recommendation four

That learning advisors deliberately select and use those performativity requirements that will yield the most advantage in terms of securing the advisor place in tertiary education.

Contribution to research

The contribution this study makes to research is, like its contribution to practice, twofold. Firstly, the grounded theory of **tactical enacting** does not provide a full conceptual description of the substantive area under study; namely, learning advisors working in TEOs in New Zealand. While grounded in data, the grounded theory transcends the data to be abstract of people, place and time (Glaser, 1978). In being so, the grounded theory goes beyond the substantive area studied to have general implications and the potential for formal theory development (Glaser, 1978). To study the tactical enactment of a professional role could lead to considering a formal theory

of tactical enacting, or the tactical enacting behaviour of other education professionals and, possibly, those performing professional roles in non-education organisations.

Secondly, this research offers a potentially valuable contribution to the ongoing debate about the impact on education professionals of the discursive structure operating in contemporary TEOs. Its value lies in making visible the experiences of non-academic staff – more specifically, learning advising staff working in TEOs in New Zealand – which are largely absent from current national and international education literature. While there are a number of articles about learning advising in the journals and conference proceedings of the professional associations, few articles consider how learning advisors experience the contemporary tertiary education environment and the discursive structure operating within them. I found a number of articles (Lewis, 2014; Pick, Teo & Yeung, 2012; Szekeres, 2006) which consider the experiences of technical, administrative, educational development and managerial staff in the contemporary TEO, several which discuss the experiences of academic staff in such organisations (Bailey, 2014; Fredman & Doughney, 2012; Smith, 2012), some about student experiences (Corbeil & Corbeil, 2014; Ransome, 2011; Tight, 2013) and only one (Percy, 2015) about the experiences of learning advisors.

Similarly, while there is a body of research which applies a governmentality framework to analyses of education settings, education policy and education professionals' experiences (Doherty, 2007; Fejes & Nicoll, 2008; Lolich, 2011; Morrissey, 2013, 2015; Peters, Besley, Olssen, Maurer & Weber, 2009), none applies the same framework to an analysis of the experiences of learning advisors in tertiary education settings. One, Percy (2015), applies a historical ontology (Foucault, 1984, 1997a) framework to explore the experiences of academic language and learning advisors working in Australian TEOs.

Although I discovered a small body of work that applies Foucault's concept of ethics to analyses of education settings, education policy and education professionals' experiences (Ball & Olmedo, 2013; Clarke, 2013; Clarke & Knights, 2015; Gunzenhauser, 2013; Wain, 2007; Watson, 2010; Zembylas & Fendler, 2007), I found no

articles, apart from Percy (2015), which used Foucault's concept of ethics to explore the experiences of learning advisors in tertiary education. Consequently, this study makes a significant contribution to research by addressing a gap in the tertiary education literature.

At the same time as addressing a gap in the literature, this research adds to the current literature about education professionals working in TEOs where a discursive structure operates. Most authors of this literature, as do I, envisage little freedom for the subject working within such organisations and also argue that discursive structures are difficult to challenge (Shore, 2008). Rather than act to reconcile discursive structures by engaging ethical subjectivities as the research presented here argues, writers assert education professionals respond with cynicism and dissent (Lorenz, 2012), are passive and uncritical, work to minimise risk and protect their reputation (Shore, 2008), and in some cases exhibit "wilful blindness" (Mingers & Willmott, 2013, p. 1064) about the situation.

In considering the contribution this study makes to research, three suggestions for future research are offered.

Potential area for future research one

Tactical enacting behaviour demands further attention given the potential usefulness of such behaviour for professional practice. **Tactical enacting** may well serve as an effective approach for managing the many and varied demands of work within contemporary organisations in a variety of settings; for example, healthcare and social service settings.

Potential area for future research two

The notion of engaging ethical subjectivities merits further investigation given the potential usefulness for professional practice. Engaging one's ethical subjectivities may well serve as an effective approach for reconciling professional ethos with that of organisations where discursive structures operate.

Potential area for future research three

The analytical framework employed in this study illuminated the discursive structure operating at the level of the contemporary TEO and produced a nuanced picture of what is really going on. This same framework could potentially contribute to analysis of behaviour at a wider organisational level and at a policy and sector level as well.

Contribution to research method

This research makes a contribution to research method; specifically, to classic grounded theory methodology and to an approach that applies a Foucauldian analytical framework to a discussion of an emergent grounded theory. Applying Foucault's concept of governmentality to a discussion of a grounded theory helps illuminate the discursive structure operating in a substantive field and produces a more nuanced explanation of participant behaviour than a grounded theory does on its own. A more nuanced explanation has the potential to strengthen a study's contribution to practice and research.

The application of an analytical framework related to Foucault's concept of governmentality to discussion of an emergent grounded theory has proven to be an excellent approach for exploring the empirical reality of learning advisors' working lives within TEOs in New Zealand for two main reasons. Firstly, the use of classic grounded theory has enabled me to produce an abstract conceptualisation of learning advisor behaviour and develop a grounded theory that transcends the detailed description of other types of qualitative data analysis. In doing so, this research supports the use of classic grounded theory methodology to produce a theoretical explanation of participant behaviour that fits, has relevance and works to explain the resolution of their main concern.

Secondly, the application of an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory of **tactical enacting** has allowed me to explore and uncover "the limits that are imposed on us … and the possibility of going beyond them" (Foucault, 1984, p. 50). In doing so, this research

supports the application of a governmentality analytical framework to a discussion of an emergent grounded theory to uncover limits imposed by the discursive structure operating in the contemporary TEO in New Zealand and reveal its possibilities.

Summary of contribution to practice, research and method

This research makes a significant contribution to practice and research in being one of very few studies that examine the experiences of learning advisors working in the contemporary TEO in New Zealand. Furthermore, it is the only study which theorises those experiences and the only New Zealand study that applies an analytical framework related to Foucault's concept of governmentality to a discussion of learning advisors' experiences. The grounded theory of **tactical enacting** can be applied by learning advisors in their everyday work to help them meet their own professional standards as well as the needs and expectations of students and the organisation, for a grounded theory "tends to engender a readiness to use it, for it sharpens their sensitivity to the problems they face and gives them an image of how they can potentially make things better" (Glaser & Strauss, 1967, p. 240). In sharpening sensitivity to the problems people face, the grounded theory has the potential to inform not only other education professionals' practice but also that of professionals in other organisations.

The application of an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory of **tactical enacting** offers an additional contribution to practice and research by revealing the forces that drive behaviour and by encouraging learning advisors to act more self-consciously, be sceptical and questioning of performativity at both the individual and organisational level in order to reconcile the performativity and professional drivers of their behaviour and avoid being governed by performativity alone. In offering suggestions for reconciling performativity and professional drivers of behaviour, this research also has implications for other education professionals' practice and potentially those performing a professional role in other organisations where discursive structures operate.

The combination of classic grounded theory methodology and an analytical framework related to Foucault's concept of governmentality is a unique research approach. To the best of my knowledge no previous study has combined the two. Such a combination offers a useful approach for understanding people's behaviour in contemporary organisations, producing a more nuanced picture of the substantive area under study than either of these approaches would on their own. In producing a nuanced picture, the potential contribution to professional practice is enhanced.

Achievement of research aims

As stated in chapter one of this thesis, the aim of this research was to generate a grounded theory that explains the experiences of learning advisors working in TEOs in New Zealand. More specifically, the research objectives were:

1. To explore individual experiences and perceptions of the learning advising role and develop a conceptual understanding of the drivers of learning advisor behaviour.

2. To build a grounded theory of learning advisor behaviour in the contemporary TEO.

These two objectives have been achieved through the study's emergent grounded theory. The grounded theory of **tactical enacting** explains how learning advisors perform their role tactically to resolve issues and concerns related to meeting their own professional standards as well as the needs and expectations of students and the organisation.

While the two objectives described above were those identified at the outset of the research, in true emergent style a third revealed itself as the study progressed. Once the grounded theory was developed and I reviewed relevant literature and wrote the contextual overview presented in chapter two, I started to recognise concepts that were implicit in the grounded theory but were not core concepts. These concepts related

more directly to organisational drivers of behaviour than the core concepts did and so a third research objective arose:

3. To identify organisational drivers of learning advisor behaviour.

Although a grounded theory has the ability to be modified as new data emerge, I decided not to gather more data and modify the grounded theory. Instead, I chose to apply an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory. I believed applying a governmentality framework would be more effective in revealing organisational drivers of learning advisor behaviour implied in the grounded theory and uncovered by the contextual overview presented in chapter two than gathering more data and modifying the grounded theory would be. Revealing organisational drivers of learning advisor behaviour would also strengthen the study's potential contribution to practice and research.

This research has achieved the initial two objectives identified for the study and an additional one which emerged during the research process. The nature of classic grounded theory methodology is such that determining precise objectives prior to commencing the research is counter indicated. The reason for choosing classic grounded theory as the research methodology for this study was to explore learning advisor behaviour in order to discover and explain their main concern and its resolution through a conceptual theory. While the research has achieved this aim, it has also gone beyond and achieved an additional objective that strengthens the research by explaining concepts that were implicit in the grounded theory but did not emerge as core concepts.

Evaluation of research findings

The outcome of classic grounded theory research is not accurate description or a set of facts. Rather, the outcome is an integrated set of conceptual hypotheses about the relationships between and amongst the grounded theory's concepts: "The conceptual idea is its essence" (Glaser, 1978, p. 7). With its conceptual essence, a grounded theory

therefore cannot be verified in a traditional sense. For the reason that grounded theory is not accurate description and consequently does not need "the excessive piling up of evidence to establish a proof" (Glaser & Strauss, 1967, p. 40), the verification criteria of other research paradigms and methodologies are inappropriate for judging the quality of a grounded theory (Holton, 2008).

A grounded theory is thoroughly grounded in the data and modified conceptually as new data emerge (Glaser, 2003) and in being so incorporates its own verification mechanisms. These verification mechanisms are the four criteria: fit, work, relevance and modifiability (Glaser, 1978; Glaser & Strauss, 1967). Two additional criteria can be applied to a grounded theory to establish its validity: *parsimony* and *scope*. A grounded theory should account for the wide variation in participant behaviour with the fewest possible categories and properties (Glaser, 1992, p. 18).

Fit is the legitimacy of the grounded theory's concepts – how well the concepts represent the learning advisor behaviour conceptualised. I believe the diligent application of classic grounded theory procedures during this research, as detailed in chapter three, has made sure the grounded theory's conceptual codes and categories have emerged from the data rather than from preconception or extant theory. I have used in vivo labels (learning advisors' own words) for codes and concepts where possible to safeguard close connection to the data, at the same time raising advisor behaviour to the conceptual level. Because the grounded theory's concepts have been generated directly from the data, the criterion of *fit* is met (Glaser, 1978).

The criterion of *work* is the ability of the grounded theory to interpret and explain behaviour in the substantive area and to predict future behaviour. More specifically, how well does the grounded theory of **tactical enacting** explain how learning advisors continually resolve their main concern and predict advisor future behaviour? Once more, due diligence in applying classic grounded theory procedures has made certain that learning advisors' main concern, role performance, is clearly evident in the data. When I have spoken informally to learning advisors about the grounded theory, they have indicated, "Yes, that is how it is." Additionally, the continuing attention in

academic (Bailey, 2014; Clarke & Knights, 2015; Lorenz, 2012; Mingers & Willmott, 2013) and related literature (Bentley, McLeod & Teo, 2014; Tertiary Education Union, 2015) regarding the roles and experiences of education professionals working in TEOs confirms the subject as one of significant concern and likely to remain so in the future.

Relevance relates to the grounded theory's focus on a main concern emerging from the substantive area under study and its conceptual grounding in the data such that the relevance of the main concern is confirmed. In this case, the grounded theory of **tactical enacting** addresses what is going on for learning advisors, offers them a way to act, and therefore is acutely relevant to their behaviour. According to Glaser (1998), "relevance … evokes instant grab" (p. 18), and as mentioned previously, learning advisors have informally attested to the relevance of the grounded theory of **tactical enacting** and its value as a way of meeting their own professional standards as well as the needs and expectations of students and the organisation.

The criterion *modifiability* is the ability of the grounded theory to be modified as new data emerge and to generate new concepts and properties of the grounded theory. The grounded theory of **tactical enacting**, through its ability to be modified, ensures its continuing relevance and value to the ever-changing social world from which it came (Glaser, 1978). Because the grounded theory of **tactical enacting** is an abstraction of the specifics of the substantive area, it is able to be modified as new data generate new concepts and properties to be integrated into the grounded theory. In this way the grounded theory remains relevant and useful. New concepts and properties do not make the grounded theory irrelevant, they simply modify the grounded theory to fit the new data. As Glaser (1998) notes: "New data never provide a disproof, just an analytic challenge" (p. 19). In its ability to be modified, the grounded theory of **tactical enacting** has the potential to make an enduring contribution to knowledge and practice. Finally, the grounded theory of **tactical enacting** also achieves the additional two criteria of *parsimony* and *scope* by capturing the wide variation in learning advisor behaviour in just two conceptual categories and four sub categories.

The grounded theory of **tactical enacting** meets all the criteria of a quality grounded theory. The grounded theory's fit and focus – what is really going on for learning advisors – means the grounded theory can be easily understood and used by advisors and others. The grounded theory of **tactical enacting** has "grab and [is] interesting", and so learning advisors will likely "remember and use [it]" (Glaser, 1978, p. 4).

Assessing the quality of the grounded theory of **tactical enacting** is only one aspect of evaluating the findings of this research. The application of an analytical framework related to Foucault's concept of governmentality to discussion of the grounded theory also warrants attention in terms of evaluation, and I use Glaser's three criteria of *fit*, *work* and *relevance* again here but in a general way in order to do so.

The criterion of *fit* refers here to the legitimacy of the concept of governmentality as an analytical framework through which to view and discuss the grounded theory. I have established legitimacy in three ways. Firstly, by providing a clear explanation of the concept of governmentality and relating it explicitly to different components of the grounded theory. Secondly, by revealing how the concept emerged as opposed to it being preconceived. The diligent application of classic grounded theory procedures enabled me to recognise governmentality's tentative emergence during grounded theory development. Reading relevant literature on governmentality to enhance my knowledge and understanding helped me recognise the concept's strengthening emergence during the literature review and writing of the contextual overview presented in chapter two. In true emergent style, the concept of governmentality arose; I did not preconceive it. Lastly, legitimacy has been confirmed by how well the concept of governmentality explains the organisational drivers of learning advisor behaviour as substantiated in chapter five. Together these three 'pieces of evidence' serve to verify the criterion of *fit* has been met.

Work, when applied to the use of governmentality, refers to the concept's ability to explain and interpret the grounded theory of **tactical enacting** in relation to the context within which it is enacted. Rigorous attention to applying the concept of governmentality to the grounded theory and writing it into the discussion has made

sure the concept is well evidenced in the chapter five discussion and well supported by extant literature. In informal conversations with learning advisors about the research findings, they have agreed the findings reflect some of their own experiences. Furthermore, informal conversations with non-learning advisor colleagues working in TEOs have generated a variety of perspectives on the applicability of the research findings to their situations. Additionally, the continuing attention in national and international academic literature on the subject of discursive structures operating in TEOs confirms the subject as one of prime and continuing concern (Ball & Olmedo, 2013; Fredman & Doughney, 2012; Morrissey, 2015; Percy, 2011).

The criterion of *relevance* relates to the presence of governmentality during the different stages of the research process; the concept of governmentality worked its way into the research. Governmentality is grounded both in the grounded theory of **tactical enacting** and in extant literature, which together ensure the significance and relevance of the concept. During informal conversations about the research findings, learning advisors have indicated they recognise some of the organisational drivers of their own behaviour, which further ensures the relevance of the concept of governmentality.

In agreeing with Thulesius (as cited in Holton, 2008) that "a grounded theory is neither right nor wrong, it just has more or less fit, relevance, workability and modifiability" (para. 28), I argue the findings of this research, comprising a grounded theory and the application of an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory, are also neither right nor wrong. Instead, they have more or less fit, are relevant and work. Readers of this research should evaluate the findings against these criteria (Thulesius as cited in Holton, 2008).

Limitations

The limitations of this research are six fold. Firstly, as previously explained, the purpose of this research was not to produce a full and accurate description of the learning advisor role and learning advising work. Instead, the purpose was to discover

what is really going on for learning advisors working in TEOs in New Zealand, to understand the drivers of advisor behaviour, and to build a grounded theory that explains that behaviour. While the grounded theory of **tactical enacting** has identified and explained the main concern of the learning advisors who participated in the research and the resolution of that main concern, the grounded theory has been limited to one core category. In being so, the grounded theory does not explain everything about learning advisors working in TEOs, nor does it presume that role performance is the only main concern of learning advisors.

Secondly, although the grounded theory of **tactical enacting** and the application of an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory is a firm fit with the contemporary TEO within which the research is grounded, there is further work that could be done to refine the grounded theory, enhance understanding of the learning advisor in the contemporary organisation, and offer suggestions for practice and research to a wider audience. For example, further work may extend the level of conceptualisation to produce a grounded theory abstract of the people, place and time of this study's context. In being more abstract, the grounded theory's usefulness would extend beyond the specific setting of learning advisors working in TEOs in New Zealand.

Thirdly, the application of an analytical framework related to Foucault's concept of governmentality to a discussion of the grounded theory could be seen as limiting the grounded theory's scope and potential contribution to practice and research by confining the analytical framework to that concept. Different analytical frameworks – for example, cultural power and domination (Bourdieu, 1986), hegemony (Gramsci, 1971), discursive resistance (Anderson, 2008) or unobtrusive resistance (Scott, 1990) – would yield different results.

The nature of postgraduate research and its attendant time and resource constraints which may have limited the scope of this research is the fourth limitation. While more data could have been gathered over more time and with more resources and constantly compared to generate additional concepts and properties and strengthen the grounded

theory, I do not believe the grounded theory of **tactical enacting** is "linear [or] thin" (Glaser, 1978, p. 116). My decision not to gather more data and modify the grounded theory when the concept of governmentality began to emerge in the grounded theory and extant literature during the research process also may have limited the scope of the research. However, I consider that applying the concept of governmentality to a discussion of the grounded theory has added to the grounded theory's integration (Glaser, 1978) and ensured its fit within the context from which it came and in doing so extended its potential utility.

The fifth limitation is my knowledge and experience of research. Even though Glaser (as cited in Evans, 2015) argues "the best grounded theory is done in the hands of beginners" (p. 62), my position as a novice grounded theory researcher will have limited the research to a greater or lesser extent. Research is itself a learning process and grounded theory methodology an experiential learning curve (Glaser, 2009). In addition, understanding Foucault's concept of governmentality to the extent necessary for the novice researcher to competently apply the concept to a research project takes time. Accordingly, my knowledge, understanding and experience of research, classic grounded theory methodology and Foucault's concept of governmentality will have had an impact on the research outcome. The quality of that outcome is directly related to the quality of my knowledge, understanding, skills and experience.

Finally, this research may also be limited by the fact that the area under study is familiar to me. My familiarity with the research setting means it is impossible to deny my experiences and my preconceptions will have influenced my perceptions of learning advisor behaviour. I did not "enter the field as [a] vague and passive being[s]" (Kwok, McCallin & Dickson, 2012, para. 3). In an effort to guard against preconception, I have maintained a critical approach throughout the research process and questioned my assumptions continually. In developing the grounded theory, I have used in vivo labels (learning advisors' own words) for codes and concepts where possible to maintain close connection to the data and endeavoured to let theoretical sensitivity guide the research (Glaser, 1978). While acknowledging that my perspective cannot be independent of the research findings, grounded theory methodology accounts for

researcher bias in so far as the researcher's perspective is treated as just another source of data. In being just another source of data, my perspective is relevant in as much as it has earned its way into the grounded theory through constant comparison with other data (Glaser, 1998). I believe diligent adherence to classic grounded theory procedures throughout the research process has mitigated researcher bias. Nevertheless, despite these best efforts I do not assert an impartial view; rather, I acknowledge there is an element of myself within this research.

Concluding statement

> There are times in life when questions of knowing if one can think differently than one thinks and perceive differently than one sees is absolutely necessary if one is to go on looking and reflecting at all. (Foucault, 1986b, p. 8)

In the same way that classic grounded theory is discovery, this research has been a discovery for me. When embarking on the research I had little idea of where it would take me. I had no idea it would lead me into the world of Michel Foucault or that I would find in his writing not just the invitation to apply the lens of governmentality to a discussion of the grounded theory but also the tools with which to do so. Despite having to tolerate confusion and to trust in emergence (Glaser, 2003) while developing the grounded theory and "to begin and begin again, to attempt to be mistaken, to go back and rework everything from top to bottom" (Foucault, 1986b, p. 7), using both classic grounded theory methodology and a governmentality analytical framework to explore the subject of learning advisors working in TEOs in New Zealand has given me a clearer picture of my own professional role and suggestions for thinking and acting differently within it.

The process of discovering the grounded theory of **tactical enacting** and capturing how the grounded theory relates to and is influenced by the context within which it is enacted has helped me understand both the social behaviour implicit in the grounded theory and the organisational drivers of that behaviour. It is my expectation that the research findings will help learning advisors too because some have already indicated

"Yes, that is how it is" during informal conversations with me. Furthermore, I expect the findings of this research will give learning advisors working in TEOs "a broader guide to what they already tend to do and perhaps help them to be more effective in doing it" (Glaser & Strauss, 1967, p. 248).

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Appendices

Appendix A

Examples of early category development

CONCEPTUAL CATEGORY: Relating (27 May 2012)

Property: Creating relationships

Category: Understanding relationship importance		Category: Building relationships			Category: Defining relationships		Category: Relating individually	
Substantive code: Acknowledging importance of relationship	**Substantive code:** Appreciating role of relationship	**Substantive code:** Establishing connection	**Substantive code:** Building trust	**Substantive code:** Sharing personal information	**Substantive code:** Being professional	**Substantive code:** Being friendly	**Substantive code:** Recognising need for individual approach	**Substantive code:** Responding individually
Incidents: Knowing that if you've built the relationship, people are more willing to ask for help in their assignments. Wanting to build relationships with them to	**Incidents:** Basing relationships on respect and making sure students know that you're honest and reliable. Understanding that it's all about connection.	**Incidents:** Needing to build rapport instantly when students walk in the door. Establishing rapport straight away so the student is confident the adviser will know what to	**Incidents:** Knowing it's about building trust. Knowing that trust comes first and then you build all the rest around it. Having a trust relationship because	**Incidents:** Sharing personal experience of being a mature student. Sharing a little bit of personal information with students. Wanting them to know who I	**Incidents:** Being a teacher and being very professional about it. Being a little bit professional and not wanting to be a mate with any of them. Being friendly	**Incidents:** Being friendly in a colleague sort of way. Establishing that I don't want to know about you as a person hugely, but just acknowledge you in a	**Incidents:** Knowing that it's really important to take the student as you find them. Tailoring every single consultation to that particular person. Tailoring my approach language/body	**Incidents:** Being extremely professional and 'matter of fact' when the person has that type of personality. Using sensitivity and knowing to tailor my approach to individual students.

ensure they don't drop off. Knowing that it's important to build relationships before you start passing on advice or suggestions to people.	Acknowledging that it's people that we're dealing with, it's not their stuff and not their assignment. Needing personal skills and being prepared to stop and chat. You have to care.	do. Understanding that they might need some good old nurturing first. Making students feel good about themselves. Getting to know them.	students can feel quite vulnerable when they come to you and say, "I can't read." Knowing that it's all about building trust so I can help them succeed.	am. Giving my whakapapa to break down barriers. Sharing a small personal experience to show I'm human. Taking the lead from students.	but with professionalism about it. Being perceived by students as a supportive and caring Believing that it's still a tutor–student relationship.	friendly way. Being friendly but not best friends. Being friendly and having a bit of fun with them but when it gets serious, making sure that they're on task.	language. Knowing that you can't be rigid – one according to all students. Making sure that the person is paramount.	Using an informal approach with students when appropriate/needed. Responding to the person in front of you and what they need.

CONCEPTUAL CATEGORY: Marketing services (27 May 2012)

Property: Promoting services				

Category: Promoting services to staff

Substantive code: Identifying the role	Substantive code: Offering services	Substantive code: Promoting services	Substantive code: Being pushy
Incidents: We need to make staff	**Incidents:** I will offer services to	**Incidents:** Going into the schools to tell staff	**Incidents:** The only reason I'm in the class

Category: Promoting services to students

Substantive code: Networking	Substantive code: Acknowledging importance of marketing	Substantive code: Advertising services	Substantive code: Going into classrooms	Substantive code: Marketing services
Incidents: Being on committees like	**Incidents:** We need to come up with	**Incidents:** We try to keep a high profile and	**Incidents:** We visit students in class	**Incidents:** Going to orientations to

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9
aware there is a very important role we are playing on the campus. We have to create the image with staff that our role is at the centre of student learning. It's important lecturers understand our role. We need to come to a level of understanding with tutors about our role otherwise they wonder what it is we are doing.	particular tutors when I have identified student need. I offer to come into a class and do a tutorial on how to complete the assignment. We encourage tutors to invite us into the class to offer some targeted support for students. I offer embedded academic skills classroom sessions to staff. We produce resources for tutors to use in class.	is because I'm pushy and keep going to them all the time and asking, "Can I come in?" Doing a bit of gentle gate crashing to get into training sessions for new supervisors to tell them what we do. I go to tutors and ask where the trouble spots in their class are and push to go in and work beside them. A lot of it is word of mouth and being in people's faces.	about what we do. Meeting regularly with Heads of Schools/Programme Coordinator/tutors to find out what courses need help. Acting as liaison with the institutions' schools to tell them what we do. Producing and distributing information packs for staff and making it very clear we do. Being involved with staff induction.	the research committee increases visibility and networks. Getting to know staff on a deeper level through unions, committees and in and around campus. Working with staff on SEER is an opportunity to let them know how we contribute to student learning. Working and planning alongside the tutors in LLN provision.	new marketing ideas because there are so many things going on in life for these young people. We need to be proactive in marketing our services because students rarely want to bother about you until it's almost too late. We have to constantly think: What can we do now to get to them? We have to get out there and become more familiar.	have posters about our services around the place as well. We put up posters in all the classrooms. Advertising our services in the student association A-Z. We advertise in the student newsletter that goes out once a fortnight. We use the postgraduate associations who are happy to send out news about what we're doing in their newsletter.	to tell them who we are and what we can do to help them. Realising that being asked to go in and do a course-specific workshop is a good opportunity to connect with students in the class and indicate how we can help; it's promotional for our work. Working in class with students results in them being more likely to come to the other things we offer.	make sure students get that I'm not remedial. Going to all the orientations so students see me and can decide if they think I might be all right to send their precious work to. I wander around students queuing up for any purpose and get a captive audience. We work in the library because that's where most of the students work.

Appendix B

Example of open coding

Open coding interview B: 11.04.12	
I try to aim for things that are going to help them solve things for the future so that they can be more independent, because the aim is, and what the idea is, to help them so that they do it without the need to actually go and see somebody about their writing and feel more confident and actually do it by themselves.	*Helping them solve things for the future so they can be more independent* *Helping them feel more confident and do it themselves*
Yes, it certainly is very relaxed and very friendly, they call me by my first name, and you know, that is probably, to make it sort of, as easy as, as friendly as possible.	*Being very relaxed* *Being very friendly* *Making it easy*
There was, for instance in one situation where you, in times when they have had something happen in their family, one student's mother had been very ill and I think maybe yes, there is a lot of times you do provide that sort of comfort and support for things outside the area of the actual study.	*Providing comfort and support for things outside study*
I've always been a teacher and I've always been very professional about it, and I think that that carries over. I notice that I'm not as, you know, I've seen other people who are more, who are real pals with students, I don't.	*Being a teacher and being very professional about it*
I'm very friendly but I'm, there's professionalism that sort of has been a part of me for so long now I think that I'm, but at times, as I say, there are times of intimacy of course but they are not usual, not really.	*Being friendly but with professionalism* *Times of intimacy – are not usual*
Yes that's right, I have tutors who do the touching or the hugging, no I'm not a toucher or a hugger.	*Not a toucher or a hugger*
My manner with greeting people with a hug, no, we're quite often sitting side by side almost shoulder to shoulder, I wouldn't take it any further than that.	*Taking it no further than shoulder to shoulder*
Sometimes I share a little bit of personal information with them.	*Sharing a little bit of personal information*
Open coding interview K: 26.04.12	
Okay, I think traditionally one to ones has always been our main area of work, but we have been told we have to move away from them and go out more into the classrooms.	*Moving away from 1-to-1 consultations* *Being told to go into classrooms*

But basically our one to one sessions are either, they used to be 1 hour but now they have been cut back to ½ hour.	*Cutting back on individual session time*
Yes, we're trying to get more coverage.	*Trying to increase coverage*
Quite often the students that need to come here aren't the students that are coming to see us, so we get out there	*Getting out there*
and get more familiar with students that are not all that comfortable in coming to seek help	*Getting familiar* *Trying to reach students who aren't comfortable seeking help*
and also to create some relationships, we are hoping that people will take that up.	*Creating relationships*
Personally it's more fun, it's really enjoyable to get out into the classroom	*Enjoying the classroom environment*
and to have that better relationship	*creating better relationships*
and we appear to be out seeing more people which is good but it's also increasing the number of people that want one-to -ones because they are getting to know us and they do feel more comfortable coming down.	*Seeing more people* *Dealing with increasing demand for individual sessions*
Everything is really just increasing.	*Everything increasing*

Appendix C

Descriptions of early emergent categories and their properties

18 June 2012

Category: Enculturating

It is emerging from analysis that a significant concern of advisers is to assist students to become full participants in the academy, *"helping students transition into the requirements and practices of a discipline at the same time as they are transitioning into a tertiary environment"* and proficient in academic literacy practices, *"I want students to become independent learners confident in their academic literacy skills."* Incidents related to this concern are grouped in the category **enculturating**.

Property: Demystifying

Demystifying is characterised by advisers 'unpacking' for students the expectations/rules/conventions of academic literacy practices, *"helping students actually understand what is being asked of them"*. In their accounts advisers describe the difficulty some students have in understanding the core assumptions that underpin academic literacy – especially academic writing. In sessions with students, advisers explicitly discuss with them the fundamentals of academic writing. Associated practices such as note-making and reading are also covered.

Property: Familiarising

I have categorised the accounts of advisers showing students how by,*"pointing out the pattern of errors so you can look for them yourself"* and *"concentrating effort on that first assignment to set them up"* as *familiarising*.

Property: Building competence

Building competence is characterised by advisers' actions aimed at helping students acquire a range of literacies. These actions include working one-to-one or in groups to teach students *"how to put words together, you know, construct sentences"*, *"write an essay in a more comprehensive manner"* and *"how to paraphrase and reference"*. Data indicate that some advisers build into their sessions with students a requirement that students practise the skills covered in the session/s: *"After the session I'll ask them to go away and write a revised copy and send it to me by e-mail."* Advisers will give students 'homework' to complete before they attend subsequent sessions.

Advisers' accounts are very clear about helping students become independent "*so that they can solve things for the future*". Advisers will focus on getting students to talk about what they have done on a particular task and what needs to be done to achieve the outcome. They wean students by reminding them about the skills learned: "*Remember from the last draft I showed you and actually you are doing this yourself now.*"

Property: Building confidence

Building confidence is characterised by advisers recognising the importance of students' feelings of self-esteem and self-efficacy and the impact of these on academic performance. Advisers consciously encourage students' confidence by letting them know they can actually do it: "*You start by saying, 'You do know maths and you can read, and while it's a bit hard now we can work through that.'*"

Category: Relating

It is emerging from analysis that the relationship with students is an important factor for success in assisting them to become full participants in the academy and proficient in academic literacy practices: "*Relationships are key and they have to be built.*" Incidents related to this concern are grouped in the category **relating**.

Property: Building trust

When exploring the topic of relationships with advisers, trust, and the importance of spending time **building trust** with students, emerged as a critical component of the adviser–student relationship. A relationship of trust is necessary because "*a lot of students feel quite vulnerable when they come to you and say 'I can't read.'*"

Property: Being professional

Findings indicate that advisers are clear that their relationship with students is a professional one. While the relationship is professional the components of 'professional' vary amongst advisers; from 'teacher' to 'mate.' Some advisers describe their relationship with students as a teaching one – "*It is very much a teacher. Being a teacher and being very professional about it*" – while others describe their relationship as being an equal with the student and "*almost like being a mate*". Sharing some of one's own personal life is seen as important; that students are more likely to listen and learn if they know something about the adviser: "*sharing my whakapapa to break down barriers*".

Property: Setting professional boundaries

Findings indicate that advisers are clear about the boundaries of their relationship with students. Boundaries include the recognition that the relationship is not a counselling one and advisers will refer students on appropriately when necessary. Physical

boundaries are included, from *"I'm not a toucher or a hugger"* to *"Sometimes they will say 'I need a hug' and I will give them a hug. I don't consider that not to be learning advising."* I have grouped incidents relating to these factors within the property of ***setting boundaries.***

Category: Tailoring

It is emerging from analysis that advisers adapt their practice to meet individual student need. They adopt a variety of interpersonal approaches and provide varying levels of service in order to meet the needs of individual students while ensuring equity amongst students who request support. Incidents relating to this behaviour are grouped in the category of **tailoring**.

Property: Personalising

Personalising is characterised by advisers *"using sensitivity and knowing"* to tailor their interpersonal approaches to individual students. Approaches can be formal or informal depending on the circumstances: *"You need to spend a lot more time getting to know 'failing' students before diving in to the academic stuff."* I have also categorised incidents relating to the use of different language and body language with different students as *personalising*.

Property: Customising

Customising is characterised by being flexible in deciding the number of consultations advisers provide to individual students. While advisers work within session limit guidelines, many override these in order to *"ensure there is a good learning outcome for the student"*.

Property: Setting boundaries

In their accounts, advisers describe the need to be alert to and manage students who *"want to be rescued"* and those who may becoming dependent on support. A variety of strategies is used to wean students and encourage independence. I have categorised accounts of such activity as ***setting boundaries.***

Category: Marketing

It is emerging from analysis that advisers are committed to ensuring that students and staff have access to their services. Advisers describe these actions as *"marketing our services"*. To effect this, advisers act to make sure that students and staff are clear about the services they provide and the nature and extent of those services. Incidents related to these actions are grouped in the category **marketing**.

Property: Managing perceptions

Advisers give accounts of working hard to ensure that both students and staff appreciate the true nature of learning advising practice. They are concerned with dispelling myths about their practice – *"It's not a counselling model – we're not here to fix you up"* – or that they provide relief teaching or a proofreading service.

Property: Informing students

The incidents categorised in this property reflect advisers informing students about what they do and what they don't do.

Property: Informing staff

The incidents categorised in this property reflect advisers informing staff about what they do and what they don't do.

Property: Increasing visibility

Accounts that describe the various strategies and actions employed by advisers to make sure all students know about services are categorised in this property.

Property: Offering services

The ***offering services*** property is characterised by the various strategies and actions used to get teaching staff to work with advisers in their classrooms both to get more coverage of students and to encourage teachers to recommend advisers to students.

Category: Cultivating professional identity

It is emerging from analysis that advisers are concerned with cultivating a particular identity that is accepted as credible by staff and students and to *"strengthen our role in terms of identity"*. They undertake a variety of professional development and research activities to increase their expertise and confirm their identity as credible experts.

Property: Taking professional development (PD) opportunities

Taking PD opportunities is characterised by advisers making the most of the opportunities for professional development offered to them. They take up opportunities so that they can get better at their jobs and be accepted as credible experts.

Property: Researching

Researching is characterised by advisers carrying out research to inform their practice and to increase their academic credibility: *"Research is critical to the work we do"*, *"Building a robust evidence-base for practice establishes credibility with academics."* While they acknowledge the need for research they do not always have the time to engage in it.

Appendix D

Emergent findings November 2012

Enculturating	Relating	Cultivating
identifying need	establishing relationship	managing perceptions
negotiating provision	maintaining professional boundaries	marketing services
explicating academic literacy	being collegial	cultivating professional identity
inculcating academic literacy		
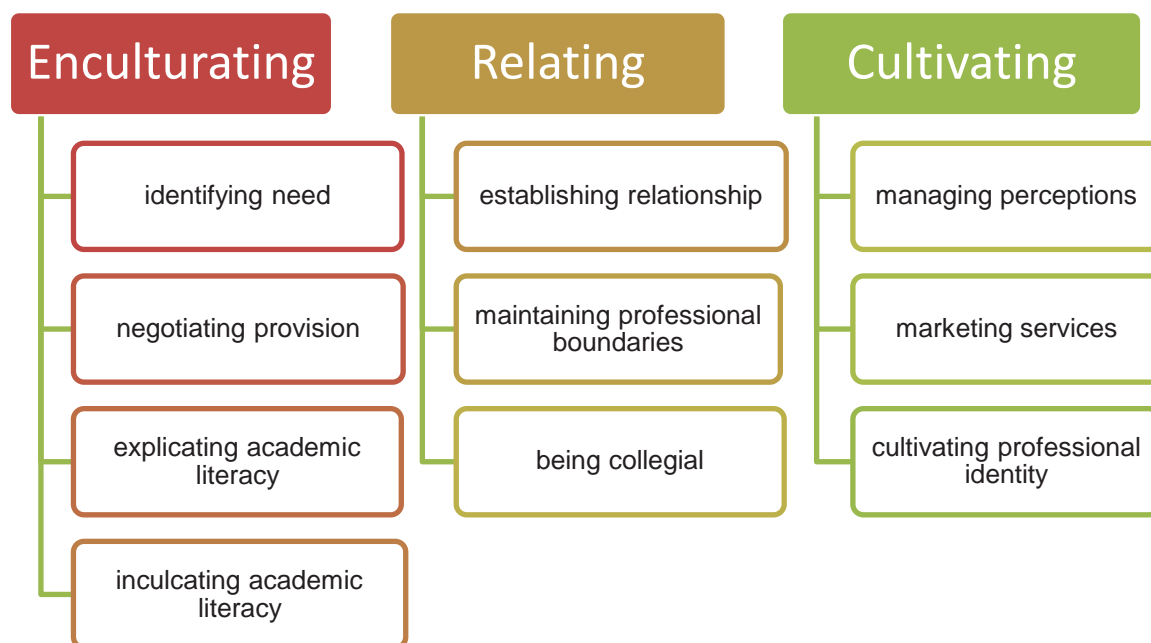
Enculturating

Learning advisors (LAs) work to help students become competent in academic literacies. Being competent is dependent on students understanding the academic conventions of their particular discipline and to be able to work and write fluently within it. *Enculturating* is the concept I've used to explain how LAs help students become skilled in academic conventions, practices and behaviours.

Students often do not know what they do not know, and so LAs begin by *identifying* individual *need* and working out the best way to meet that need. It is evident from the very first meeting with a student that the LA expects the student to take control of their own learning and to work in partnership with the LA. LAs are very clear that they will not 'fix' things for students or do the work for them. However, while there are 'services' that LAs do not generally provide to students – for example, proofreading – they are prepared to be flexible and use their professional judgement to *negotiate individual provision* when student need dictates. While *negotiating* individual *provision* is a means to ensure that students become enculturated, not all LAs are willing to do this. Similarly, although most LAs work with directives that limit the number of individual consultations they can provide to students, many will override these limits in response

to individual student need balanced with the time the LA has available alongside a commitment to equity of student access to services.

LAs emphasise the importance of *explicating academic literacy* for students. To do this they unpack the expectations/rules/conventions of academic literacies, make literacy explicit and show students how to construct literacy. The process of explicating is one in which LAs demand full participation on the part of the student as they explain and demonstrate academic literacy requirements.

Promoting capability in academic literacies through building students' confidence and competence is a key component of *inculcating academic literacy*, as is fostering independence. LAs expect students to do as much work as they can independently and provide resources and strategies to enable them to do so. In order to *inculcate academic literacy*, LAs will also encourage students to practise the skills covered during a consultation/class. They will give students 'homework' to complete and then review the work in subsequent sessions and provide feedback.

LAs are direct in giving feedback to students about their work and "*ask difficult questions*" when indicated in order to foster students' ownership of and responsibility for their own learning.

Relating

In order to enculturate students, LAs need to build relationships with both students and staff. The *relating* process involves using a variety of strategies to connect with students and staff; a consequence of successful relationship building is the development of trust. Establishing the 'right' kind of relationship with students is critical. The 'right kind' of relationship is variously described as 'professional', 'teacher', 'colleague' and 'mate', and includes recognition of the need to relate to students as individuals rather than adopt a one-size-fits-all approach to relationships. LAs adapt their interpersonal approach as appropriate to meet student and staff relationship needs.

Whilst LAs *maintain professional boundaries* in their dealings with students and are very clear about where the parameters are, the behaviours within that cover a wide spectrum. While all LAs acknowledge that there are physical boundaries in relationships, some consider physical contact such as hugging to be appropriate in certain circumstance but others do not. Some LAs will let students talk if they are upset and are comfortable dealing with students crying; others are not. Most LAs recognise that supporting student learning comes with a bit of pastoral care.

All LAs recognise role boundaries; they are not counsellors and will refer students on to the appropriate staff when indicated. LAs use a variety of boundary-setting strategies which lay down the specific ground rules for advising interactions.

Being collegial is also important; it involves establishing and maintaining collegial relationships with staff for mutual benefit. A variety of strategies is employed, from collaborating in classrooms to co-attendance at professional development activities. In this way, trust and credibility are built and collegial relationships fostered and sustained.

Cultivating

Cultivating students, staff and LAs' professional identity are critical tasks. Cultivating involves strategising in order to generate individuals who access the services provided and understand the nature and extent of those services. In addition, the professional identity must be cultivated to establish LA expertise and credibility.

When *cultivating,* LAs need to *manage perceptions* through negotiating expectations and dispelling myths; they must also clarify service provision by explaining the nature and extent of advising services to both students and staff on an ongoing basis. *Managing client perceptions* can be a challenging and frustrating process which involves the skilful creation and management of client perceptions to LAs' end; perceptions are managed carefully to fit the services provided. *Cultivating* is a constant effort and LAs must juggle the need to cultivate with the ongoing need to provide timely services to students.

Because LAs are committed to equitable access to services for all students, they must promote those services to them and to staff. *Marketing* involves a wide variety of strategies designed to get people on board and is a tactic for enculturation. *Marketing* activities include networking, offering to go into classrooms and recruiting students directly.

LAs promote services and foster beneficial connections with students and staff on a regular and ongoing basis with an emphasis on face-to-face interactions. While *marketing* takes place on an ongoing basis, it can be sporadic because of fluctuating workload demands.

The networking process includes offering services directly to students and staff, being creative, and taking every opportunity to connect personally with people. The appropriate development of networks has a tangible effect both on the number of people seeking services and on their understanding of those services. While much recruiting takes place at certain times of the year (e.g., beginning of trimesters), it is an ongoing process and depends on how much 'spare' time is available.

In addition to juggling the need to cultivate with the need to provide services, LAs must *cultivate* their professional identity. They undertake activities designed to increase their expertise and credibility, taking advantage of continuing education opportunities and researching their practice. Although most LAs acknowledge the importance of

carrying out research, only some are actively involved in it. Juggling the time available and student demand for services often leaves little time for research. LAs must cultivate an expert and credible identity so that students and staff will use their services.

Appendix E

The practice of learning advising: How do learning advisers practise?

Information sheet: Learning adviser (interview)

Who is the researcher?

My name is Catherine Ross and I work in the Learning Centre at the Open Polytechnic. I am enrolled in the Doctor of Education programme at Massey University and this research constitutes the thesis component of that programme.

What is the aim of this study?

I am seeking voluntary participation in this research and the aim is to investigate how learning advisers working in Tertiary Education Organisations in New Zealand carry out their work. Specifically, how learning advisers practise learning advising. My intention is to develop a substantive theory of learning advising. The purpose of the study is to enhance learning advisers' understanding and practical knowledge of learning advising and to be useful to them by contributing theory for their practice.

How will you be involved in this research?

I invite you to participate in this study by volunteering to be interviewed. Your experience as a tertiary learning adviser and your thoughts and ideas about learning advising work will make a valuable contribution to this study. If you decide to participate you will be asked to take part in up to three interviews with me during the period May to November 2011. These interviews can be via email or conducted at your place of work, at a location that is convenient to both of us, or by telephone. I would like your permission to tape record the face-to-face/telephone interviews and you will have the right to have the tape recorder turned off at any time. The interviews will last a maximum of one hour each.

Initial interviews will be open-ended and conversational and I would begin by inviting you to write or talk generally about your experience of working as a learning adviser.

As the research progresses and I begin to develop understandings and build concepts from the ideas and experiences shared by you and other learning advisers, I will ask you specific questions which relate to those understandings and concepts. You can decline to answer any question. Please remember that any information you share will always be confidential.

If you agree to participate in this research you will be invited to read over the transcript of your face-to-face/telephone interview. You do not have to do this. Reading the transcript, however, gives you the opportunity to agree (or disagree) with what has been recorded; it also allows you to withdraw any detail that you do not want included in the data.

In summary, the total time commitment required will be no more than four and a half hours which includes reading and responding to your face-to-face/telephone interview transcripts.

Will you be able to be identified in the research?

To protect your privacy the face-to-face/telephone interviews will not be conducted in your place of work unless you choose this option. In addition, your name will not be used in the research. Instead, you will choose a pseudonym that will be used or I can choose one for you. The institution in which you work will not be identified in the research.

The information you provide to me will be strictly confidential. The only people who will have access to the data will be me, my thesis supervisors Nick Zepke and Seth Brown, and the confidential typist. The email and tape-recorded interviews and transcripts will be kept securely in a locked cupboard at my place of employment during the study as will all research notes. Any electronic data files will be password protected.

On completion of the study all research material will be stored securely for a period of three years and then destroyed. However, the audio tape of your interview will be returned to you if you wish.

Can you withdraw from the study at any time?

Yes. Because your involvement in this research is voluntary you are free to decline to take part or to withdraw your participation at any time up until the completion of your last interview and the editing of the face-to-face/telephone interview transcript. You

are invited too, to ask for further information or explanations about the study at any time before or during the research.

Can you contact me?

Of course. You are welcome to contact me at any time:

Catherine Ross
The Learning Centre Te Wāhanga Whakapakari Ako
Open Polytechnic
Private Bag 31914
Lower Hutt 5040
DDI: 04 913 5420
Email: catherine.ross@openpolytechnic.ac.nz

If you have further questions or any concerns about the research that you would rather not discuss with me you can contact my research supervisors:

Associate Professor Nick Zepke
School of Educational Studies
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8663
Email: N.Zepke@massey.ac.nz

Dr. Seth Brown
School of Arts, Development and Health Education
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8613
Email: S.Brown.1@massey.ac.nz

Please remember that you have the right to decline to participate in this research.

Summary

If you agree to be involved in this research it is important that you are clear about the following:

- The details of the study have been clearly explained to you. Your questions have been answered to your satisfaction and you know you can ask further questions at any time.

- You have the right to withdraw from the study at any time up until the completion of your last interview and the editing of the face-to-face/telephone interview transcript. Any information you may have contributed will not be used in the research.

- Your name will not be used in any of the research materials and you will decide whether it is a pseudonym of your choice or one assigned to you that is to be used throughout the research. The institution in which you work will not be identified in any of the research materials.

- The information you give will be used only for this research and for publications and presentations arising from it.

- You will receive a summary of the research once the study is concluded.

Thank you for taking the time to read this.

Catherine Ross

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/12. If you have any concerns about the conduct of this research, please contact Dr Nathan Matthews, Acting Chair, Massey University Human Ethics Committee: Southern B, telephone 06 350 5799 x 8729, email humanethicsouthb@massey.ac.nz

Appendix F

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Consent form: Learning adviser (interview)

Researcher

Catherine Ross

I have read the information sheet and have had the details of the above study explained to me. I have had sufficient time to read and consider all the information.

My questions have been answered to my satisfaction and I am aware that I may ask further questions at any time during my participation in the study.

I am also aware that I have the right to withdraw from the study at any time up until the completion of my last interview and my editing of the face-to-face/telephone interview transcript and to decline to answer any questions.

I understand that my name will not be used in any of the research materials, nor will the institution in which I work be identified, and the information I give will be used only for this research and publications and presentations arising from it.

I agree/do not agree to the face-to-face/telephone interview/s being audio taped.

I am aware I have the right to ask for the tape recorder to be turned off at any stage during the interview/s.

I wish/do not wish to have my interview audio tape returned to me.

I agree to participate in this study under the conditions set out in the information sheet.

Signed: _____

Name: _____

Date: _____

Appendix G

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Information sheet: Learning adviser (observation)

Who is the researcher?

My name is Catherine Ross and I work in the Learning Centre at the Open Polytechnic. I am enrolled in the Doctor of Education programme at Massey University and this research constitutes the thesis component of that programme.

What is the aim of this study?

I am seeking voluntary participation in this research and the aim is to investigate how learning advisers working in Tertiary Education Organisations in New Zealand carry out their work. Specifically, how learning advisers practise learning advising. My intention is to develop a substantive theory of learning advising. The purpose of the study is to enhance learning advisers' understanding and practical knowledge of learning advising and to be useful to them by contributing theory for their practice.

How will you be involved in this research?

I invite you to participate in this study by volunteering to be observed during one or two learning advising consultations with a student/s. If consultations are half an hour long then I would observe two; if longer than half an hour I would observe only one.

The total time I would observe you would be a maximum of one hour and on one occasion. I would sit in the same room as you and the student/s and write notes of what I see and hear. The purpose of the observation is to look at what you do and how you do it. I would also look at how you and the student/s interact together.

I would ask your agreement to provide another consultation for a student who believed their consultation with you had been negatively affected by my observation of it.

Will you be able to be identified in the research?

Your name will not be used in any of the research materials. The institution where you work will not be identified in any research materials.

The notes from the observations will be strictly confidential. The only people who will have access to the data will be me and my thesis supervisors Nick Zepke and Seth Brown. The observation data will be kept securely in a locked cupboard at my place of employment during the study as will all research notes. Any electronic data files will be password protected.

On completion of the study all research material will be stored securely for a period of three years and then destroyed.

Can you withdraw from the study at any time?

Yes. Because your involvement in this research is voluntary you are free to decline to take part or to withdraw your participation at any time up until one month after the date of the observation. You are invited too, to ask for further information or explanations about the study at any time before or during the research.

Can you contact me?

Of course. You are welcome to contact me at any time:

Catherine Ross
The Learning Centre Te Wāhanga Whakapakari Ako
Open Polytechnic
Private Bag 31914
Lower Hutt 5040
DDI: 04 913 5420
Email: catherine.ross@openpolytechnic.ac.nz

If you have further questions or any concerns about the research that you would rather not discuss with me you can contact my research supervisors:

Associate Professor Nick Zepke
School of Educational Studies
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8663

Email: N.Zepke@massey.ac.nz

Dr. Seth Brown
School of Arts, Development and Health Education
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8613
Email: S.Brown.1@massey.ac.nz

Please remember that you have the right to decline to participate in this research.

Summary

If you agree to be involved in this research it is important that you are clear about the following:

- The details of the study have been clearly explained to you. Your questions have been answered to your satisfaction and you know you can ask further questions at any time.

- You have the right to withdraw from the study at any time up until one month after the date of the observation and any information noted during the observation/s will not be used in the research.

- Your name will not be used in any of the research materials. The institution where you work will not be identified in any research materials.

- The data from the observations will be used only for this research and for publications and presentations arising from it.

- You will receive a summary of the research once the study is concluded.

Thank you for taking the time to read this.

Catherine Ross

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/12. If you have any concerns about the conduct of this research, please contact Dr Nathan Matthews, Acting Chair, Massey University Human Ethics Committee: Southern B, telephone 06 350 5799 x 8729, email humanethicsouthb@massey.ac.nz

Appendix H

The practice of learning advising: How do learning advisers practise?

Consent form: Learning adviser (observation)

Researcher

Catherine Ross

I have read the information sheet and have had the details of the above study and of the observation explained to me. I have had sufficient time to read and consider all the information.

My questions have been answered to my satisfaction and I am aware that I may ask further questions at any time during my participation in the study.

I understand that I can stop the observation at any time.

I am also aware that I have the right to withdraw from the study at any time up until one month after the date of the observation.

I understand that my name will not be used in any of the research materials nor will the institution in which I work be identified, and the information noted will be used only for this research and publications and presentations arising from it.

I agree to participate in this study under the conditions set out in the information sheet.

Signed: _____

Name: _____

Date: _____

Appendix I

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Information sheet: Student

Who is the researcher?

My name is Catherine Ross and I work in the Learning Centre at the Open Polytechnic. I am enrolled in the Doctor of Education programme at Massey University and this research constitutes the thesis component of that programme.

What is the aim of this study?

I am seeking voluntary participation in this research and the aim is to investigate how learning advisers working in Tertiary Education Organisations in New Zealand carry out their work with students. My intention is to develop a substantive theory of learning advising. The purpose of the study is to enhance learning advisers' understanding and practical knowledge of learning advising and to be useful to them by contributing theory for their practice.

How will you be involved in this research?

I invite you to participate in this study by volunteering to be observed during one learning support consultation with a learning adviser. I would sit in the same room as you and the learning adviser and write notes of what I see and hear.

The purpose of the observation is to look at what the learning adviser does and how they do it. I would also look at how the learning adviser and you interact together.

I would also be available to meet with you before and after the observation to discuss any questions or concerns and whether or not you would like another appointment with the adviser if the consultation where you were observed did not met your learning needs.

Will you be able to be identified in the research?

Your name will not be used in any of the research materials. The institution where you are studying will not be identified in any research materials.

The notes from the observations will be strictly confidential. The only people who will have access to the data will be me and my thesis supervisors Nick Zepke and Seth Brown. The observation data will be kept securely in a locked cupboard at my place of employment during the study as will all research notes. Any electronic data files will be password protected.

On completion of the study all research material will be stored securely for a period of three years and then destroyed.

Can you withdraw from the study at any time?

Yes. Because your involvement in this research is voluntary you are free to decline to take part or to withdraw your participation at any time up until one month after the date of the observation. You are invited too, to ask for further information or explanations about the study at any time before or during the research.

Can you contact me?

Of course. You are welcome to contact me at any time:

Catherine Ross
The Learning Centre Te Wāhanga Whakapakari Ako
Open Polytechnic
Private Bag 31914
Lower Hutt 5040
DDI: 04 913 5420
Email: catherine.ross@openpolytechnic.ac.nz
If you have further questions or any concerns about the research that you would rather not discuss with me you can contact my research supervisors:

Associate Professor Nick Zepke
School of Educational Studies
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8663
Email: N.Zepke@massey.ac.nz

Dr. Seth Brown

School of Arts, Development and Health Education

Massey University College of Education

Private Bag 11 222

Palmerston North

Ph: 06 356 9099, ext 8613

Email: S.Brown.1@massey.ac.nz

Please remember that you have the right to decline to participate in this research.

Summary

If you agree to be involved in this research it is important that you are clear about the following:

- The details of the study have been clearly explained to you. Your questions have been answered to your satisfaction and you know you can ask further questions at any time.

- You have the right to withdraw from the study at any time up until one month after the date of the observation and any information noted during the observation will not be used in the research.

- Your name will not be used in any of the research materials. The institution where you are studying will not be identified in any research materials.

- The data from the observation will be used only for this research and for publications and presentations arising from it.

- You will receive a summary of the research once the study is concluded by including your e-mail address on the consent form.

Thank you for taking the time to read this.

Catherine Ross

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/12. If you have any concerns about the conduct of this research, please contact Dr Nathan Matthews, Acting Chair, Massey University Human Ethics Committee: Southern B, telephone 06 350 5799 x 8729, email humanethicsouthb@massey.ac.nz

Appendix J

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Consent form: Student

Researcher

Catherine Ross

I have read the information sheet and have had the details of the above study and of the observation explained to me. I have had sufficient time to read and consider all the information.

My questions have been answered to my satisfaction and I am aware that I may ask further questions at any time during my participation in the study.

I understand that I can stop the observation at any time.

I am also aware that I have the right to withdraw from the study at any time up until one month after the date of the observation.

I understand that my name will not be used in any of the research materials nor will the institution at which I am studying be identified, and the information noted will be used only for this research and publications and presentations arising from it.

I agree to participate in this study under the conditions set out in the information sheet.

Signed: _____

Name: _____

Email address for
research summary: _____

Date: _____

Appendix K

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Permission to access students

[Name]
Manager Learning Support Centre
[Tertiary Institute]
Wellington

Dear [Name]

My name is Catherine Ross and I work in the Learning Centre at the Open Polytechnic. I am enrolled in the Doctor of Education programme at Massey University and am undertaking research which constitutes the thesis component of that programme.

The aim of this research is to investigate how learning advisers working in Tertiary Education Organisations in New Zealand carry out their work. Specifically, how learning advisers practise learning advising. My intention is to develop a substantive theory of learning advising. The purpose of the study is to enhance learning advisers' understanding and practical knowledge of learning advising and to be useful to them by contributing theory for their practice.

To collect initial data for this project I am conducting observations of learning advisers as they work with students. [Name] has agreed to participate in the research and I would like your permission to visit and observe her/him during one or two learning support consultations with a student/s. If consultations are half an hour long then I would observe two; if longer than half an hour I would observe only one. The total time I would observe the learning adviser and student/s would be a maximum of one hour.

I also seek your agreement for you and/or the learning advisers in your centre to distribute written invitations to potential student participants.

Please find attached copies of the student information sheet and consent form for your information.

Thank you for considering my request and I look forward to hearing from you.

Ngā mihi nui

Catherine Ross

The Learning Centre
Open Polytechnic
DDI: 04 913 5420
Email: catherine.ross@openpolytechnic.ac.nz

Appendix L

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Information sheet: Learning adviser (workshop/discussion group)

Who is the researcher?

My name is Catherine Ross and I work in the Learning Centre at the Open Polytechnic. I am enrolled in the Doctor of Education programme at Massey University and this research constitutes the thesis component of that programme.

What is the aim of this study?

I am seeking voluntary participation in this research and the aim is to investigate how learning advisers working in Tertiary Education Organisations in New Zealand carry out their work. Specifically, how learning advisers practise learning advising. My intention is to develop a substantive theory of learning advising. The purpose of the study is to enhance learning advisers' understanding and practical knowledge of learning advising and to be useful to them by contributing theory for their practice.

How will you be involved in this research?

I invite you to participate in this study by volunteering to participate in a group workshop/discussion at this conference. Your experience as a tertiary learning adviser and your thoughts and ideas about learning advising work will make a valuable contribution to this study. If you decide to participate you will take part in one group workshop/discussion with up to 20 other learning advisers. The workshop/discussion will last a maximum of one hour. Participation in the workshop/discussion is on the understanding that the discussion will be audio taped.

During the workshop/discussion I will give an overview of the research and present my analysis of the data to date. I will invite you to contribute to the developing theory

by adding information where there are gaps and clarifying any ambiguities. I am also interested in your comments on the application of the emerging theory to your practice. You can decline to answer any question or respond to any aspect of the discussion. Please remember that any information you share will always be confidential.

Will you be able to be identified in the research?

To protect your privacy your name will not be used in the research. Instead, you will choose a pseudonym that will be used or I can choose one for you. The institution where you work will not be identified in any research materials. Group members will agree to maintain confidentiality on all matters discussed by other members of the group during the workshop/discussion.

The information you provide to me will be strictly confidential. The only people who will have access to the data will be me, my thesis supervisors Nick Zepke and Seth Brown, and the confidential typist. The tape-recorded discussion and workshop/discussion notes will be kept securely in a locked cupboard at my place of employment during the study as will all research notes. Any electronic data files will be password protected.

On completion of the study all research material will be stored securely for a period of three years and then destroyed.

Can you withdraw from the study at any time?

Yes. Because your involvement in this research is voluntary you are free to decline to take part or to withdraw your participation at any time up until one month after the date of the workshop/discussion. You are invited too, to ask for further information or explanations about the study at any time before or during the research.

Can you contact me?

Of course. You are welcome to contact me at any time:

Catherine Ross
The Learning Centre Te Wāhanga Whakapakari Ako
Open Polytechnic
Private Bag 31914
Lower Hutt 5040
DDI: 04 913 5420
Email: catherine.ross@openpolytechnic.ac.nz

If you have further questions or any concerns about the research that you would rather not discuss with me you can contact my research supervisors:

Associate Professor Nick Zepke
School of Educational Studies
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8663
Email: N.Zepke@massey.ac.nz

Dr. Seth Brown
School of Arts, Development and Health Education
Massey University College of Education
Private Bag 11 222
Palmerston North
Ph: 06 356 9099, ext 8613
Email: S.Brown.1@massey.ac.nz

Please remember that you have the right to decline to participate in this research.

Summary

If you agree to be involved in this research it is important that you are clear about the following:

- The details of the study have been clearly explained to you. Your questions have been answered to your satisfaction and you know you can ask further questions at any time.

- You have the right to withdraw from the study at any time up until one month after the date of workshop/discussion and any information you may have contributed will not be used in the research.

- Your name will not be used in any of the research materials and you will decide whether it is a pseudonym of your choice or one assigned to you that is to be used throughout the research. The institution in which you work will not be identified in any research materials.

- The information you give will be used only for this research and for publications and presentations arising from it.

- You will receive a summary of the research once the study is concluded.

Thank you for taking the time to read this.

Catherine Ross

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/12. If you have any concerns about the conduct of this research, please contact Dr Nathan Matthews, Acting Chair, Massey University Human Ethics Committee: Southern B, telephone 06 350 5799 x 8729, email humanethicsouthb@massey.ac.nz

Appendix M

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Consent form: Learning adviser (workshop/discussion group)

Researcher

Catherine Ross

I have read the information sheet and have had the details of the above study explained to me. I have had sufficient time to read and consider all the information.

My questions have been answered to my satisfaction and I am aware that I may ask further questions at any time during my participation in the study.

I am also aware that I have the right to withdraw from the study at any time up until one month after the date of workshop/discussion and to decline to answer any questions or respond to any aspect of the discussion.

I understand that my name will not be used in any of the research materials nor will the institution in which I work be identified, and the information I give will be used only for this research and publications and presentations arising from it.

I agree to participate on the understanding that the workshop/discussion will be audio taped.

I agree to maintain confidentiality on all matters discussed in the group workshop/discussion.

I agree to participate in this study under the conditions set out in the information sheet.

Signed: _____

Name: _____

Date: _____

Appendix N

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Authority for the release of transcripts

I confirm that I have had the opportunity to read and amend the transcript of the interview(s) conducted with me.

I agree that the edited transcript and extracts from this may be used in reports and publications arising from the research.

Signature

Date

Full name (Printed)

Appendix O

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

The practice of learning advising: How do learning advisers practise?

Confidentiality agreement

I (Full name printed)

agree to keep confidential all information concerning the project *The practice of learning advising: How do learning advisers practise?*

I will not retain or copy any information involving the project.

Signature

Date

Appendix P

Ethics approval

MASSEY UNIVERSITY

9 May 2011

Catherine Ross
75 Hautana Street
LOWER HUTT

Dear Catherine

Re: HEC: Southern B Application – 11/12
**   The practice of learning advising: How do learning advisers practise?**

Thank you for your letter dated 12 April 2011.

On behalf of the Massey University Human Ethics Committee: Southern B I am pleased to advise you that the ethics of your application are now approved. Approval is for three years.   If this project has not been completed within three years from the date of this letter, reapproval must be requested.

If the nature, content, location, procedures or personnel of your approved application change, please advise the Secretary of the Committee.

Yours sincerely

Dr Nathan Matthews, Acting Chair
Massey University Human Ethics Committee: Southern B

cc   A/Prof Nick Zepke   Dr Seth Brown
     School of Educational Studies   School of Arts, Development & Health Education
     PN900   **PN900**

     A/Prof Chris Freyberg, Acting HoS   Dr Kama Weir, HoS
     School of Educational Studies   School of Arts, Development & Health Education
     PN900   **PN900**

     Mrs Roseanne MacGillivray
     Graduate School of Education
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