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Asset-Based Co-operative Management: OPERA as a Process of Critical Appreciation

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The field of co-operative development is replete with invocations to practise participatory management. Furthermore, Moreau and Mertens (2013) have argued that participatory management should be part of the core curriculum for social economy (SE) management education. This study examines an approach to participatory management called OPERA through the theoretical perspective of critical appreciative processes (CAPs). We participated in four OPERA sessions involving 75 co-operative and SE educators, consultants and managers between July 2014 and April 2016. We wrote reflective diaries of the final two sessions, then used OPERA in our own educational and developmental work to authenticate findings. We found that OPERA elicits a wide range of contributions from participants; improves their engagement in discussion and decision-making; provides a model for non-hierarchical management practice, and; promotes direct democracy. While we found credible evidence that OPERA contributes to the discovery, dream and design parts of appreciative processes, we did not find that it promotes critical appreciation. OPERA emphasises the selecting of 'assets' (what works) and avoids critical or confrontational debate. OPERA can contribute to consensus-based co-operative management and workplace democracy, but may marginalise radical, unpopular or contrary points of view.

Introduction and Study Context

Social economy (SE) education — as a field — reflects a growing desire from educators and policy makers that business schools develop inclusive, value-driven and democratically grounded approaches to management education (Doherty et al., 2015; Winn & Neary, 2016). This paper studies the use of OPERA (Slaen et al., 2014) — a five stage decision-making process developed by the Integrated Consulting Group (ICG) in Stockholm — to evaluate its potential for developing co operative social entrepreneurship (CSE). OPERA is explicit about its approach to participatory management. We wanted to examine whether it could counter some of the effects of neo liberal doctrine by giving a greater voice to stakeholders and contribute to a paradigm shift in management thinking and practice (Nicholls, 2006; Defourny & Nyssens, 2014; Hulgard, 2014; Ridley-Duff & Bull, 2016).

The authors of OPERA claim that it eliminates 'fake democracy' at work (Slaen et al., 2014, p. 72) and promotes 'true participation' (Slaen et al., 2014, p. iv). If this is so, it would add to arguments already made in this journal about participatory management in worker and solidarity co operatives, employee-owned businesses and the social solidarity economy (Arthur et al., 2003; Lund, 2012; Ridley-Duff & Ponton, 2013). We grew interested in OPERA after observing its use in SE development and wanted to test its alignment with previous SE development work based on critical appreciative processes (CAPs) (see Grant, 2006, 2014; Ridley-Duff & Duncan, 2015; Ridley-Duff et al., 2015). As a result, this study set out to answer the research question (RQ): 'What learning mechanisms are triggered by OPERA, and do they catalyse critical appreciation amongst SE professionals?'

The paper is divided into four sections. Firstly, we briefly review approaches to SE management education. We highlight how functionalist approaches were imported from private sector performance management systems into MBA-like curricula before a switch to competency and critically reflexive approaches (Somers, 2005; Bull & Crompton, 2006; Moreau & Mertens, 2013; Douglas & Grant, 2014; Ridley-Duff & Bull, 2016). The second part explains the design of our study, the data collection methods and coding practices applied to four OPERA sessions. Thirdly, we report our findings and interpretation of OPERA 'mechanisms' in each stage of

a CAP (Pawson & Tilley, 1997; 2001; Ridley-Duff & Duncan, 2015). Finally, we clarify our contributions to knowledge by answering our research question.

Functionalist and Competency Approaches to SE Management Education

Early approaches to SE education focused on the provision of instruments to assist strategic planning. For example, both Somers (2005) and Bull (2007) developed adaptations of the Balanced Score Card (Kaplan & Norton, 1992; Meadows & Pike, 2010). Others have adapted a planning tool — Business Canvas — to create a Social Lean Canvas (Osterwalder, 2004; Yeoman & Moskovitz, 2014) and FairShares Canvass (Ridley-Duff et al., 2017). All have strong foundations in identifying and evaluating the functional value of including stakeholders in governing bodies or consulting with them. Whilst Wright, Paroutis, and Blettner (2013) observe that managers employ business tools that "provide multiple perspectives, help users to come up with new ideas and perform analysis from different angles" management education remains largely grounded in studying the functions of management (Bull, 2008; Goldstein et al., 2009).

Mouchamps (2014, p. 727) considered the impact and relevance of tools for strategic planning, reporting and economic optimisation for social economy managers. He concludes that such tools almost "globally fail to account for the specific features of social enterprises" and, in many cases, lack strong theoretical bases. As such he called for further research into the way tools are developed and used. Paton's review of the use of evaluation tools provides useful insights, particularly that generic tools may or may not be helpful depending on the attitudes of managers towards them. Although Paton is working within the context of performance management and performance improvement tools, we suggest these approaches are equally applicable when using decision making tools such as OPERA. He argues that isomorphic pressure from 'management fads' can partly explain the increased application of tools. However, he also found that "the context of use, and how a method is applied, matters much more than its origins" (Paton, 2003, p.159). As such, he identifies three key attitudes amongst SE managers:

- A 'committed' approach, with an internalised commitment to functionalist, positivist management approaches, coupled to a strong belief in the value of such tools and the discourse that accompanies them. Loss of flexibility is identified as a key risk of this approach.

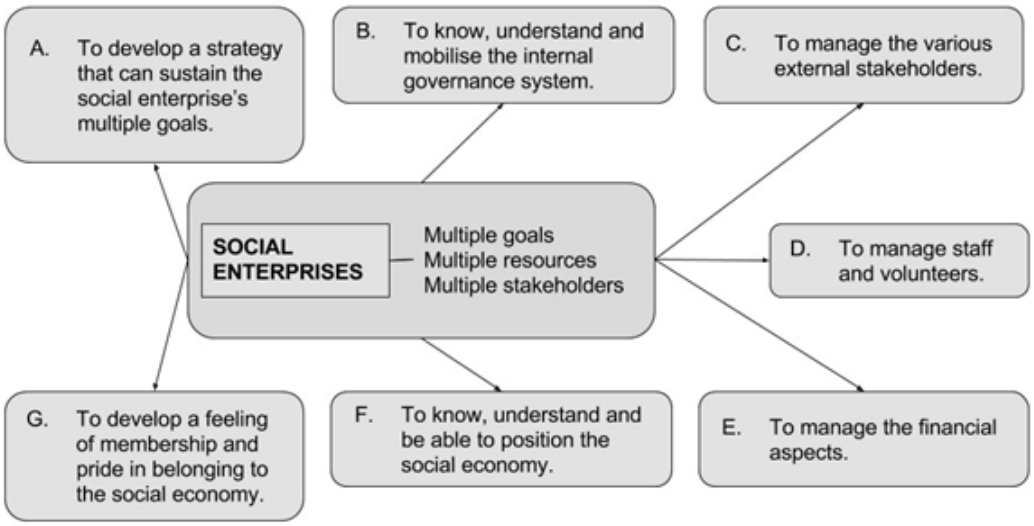
- A 'cynical' approach, whereby managers become sceptical and distrusting of management tools and their application, but deploy them to conform to external funder requirements or calculatively comply to secure legitimacy.

- A 'reflective' approach, whereby a healthy level of critique and caution is applied during use so that a team remains alert to limitations and potential abuses and distortions, either of the method itself or the outcomes identified. Within this reflective approach, context is critical, the narrative(s) of stakeholders are recognised, and the value of relationship building is considered alongside the value of the findings that the tools provide.

Paton's 'committed' and 'cynical' approaches are neither critical (in the sense of deconstructing the underlying premises of management knowledge) nor committed to competencies that go beyond following prescriptive procedures to demonstrate compliance. In our view, it is only his 'reflective' mode that aligns with our previous work on democratic workplaces, and OPERA's approach to diversifying the voices heard during planning processes.

There has already been a study of the educational needs and aspirations of social economy managers in Europe out of which Moreau and Mertens (2013) proposed a competency framework (Figure 1). They identify seven competencies and design a curriculum that addresses the knowledge, skills and behaviours needed (p.171) to develop them.

Figure 1: The Competence Model for SE Enterprise Managers



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

One competency relates to managing multiple stakeholders, which calls for 'flexible behaviour' and 'collaborative skills' (pp. 173-174). At first glance, this appears to be an area where OPERA might contribute to the development of CSE. Similarly, the competency of knowing, understanding and being able to position the social economy (p. 176) involves a commitment to critical thinking and reflection that may be enhanced by OPERA. Building on Paton's reflective approach, we now turn to the development of a critical lens (Grant, 2014) to consider appreciative (asset-based) approaches to learning and development and their links to democratic decision-making.

Appreciative Inquiry and Critical Appreciative Processes

According to Cooperrider and Srivastva (1987), appreciative inquiry (AI) is an inclusive process for generating, implementing and managing changes in training and development, organisations and communities. Cooperrider and Whitney's (2000) 4D cycle of inquiry (discover, dream, design, destiny) is a common representation of the process. Starting from a positive statement or proposition, the process moves into envisioning and dialoguing phases. Participants identify what is 'good' in the current situation (discover) and then aspire to what the best may be (dream). From here, participants build on identified strengths to realise their dreams (by designing their destiny).

Given Grant's (2006) findings that AI participants develop a greater awareness of their powers of interpretation and imagination, scholars argue that the value of appreciative inquiry often lies beyond its formal process and rests in its capacity for critical analysis, bringing about changed understandings and stimulating collective approaches to knowledge creation (Barge & Oliver, 2003; Bushe & Khamisa, 2004; Grant, 2006). Bushe (2007, p. 1) observes "AI does not magically overcome poor sponsorship, poor communications, insensitive facilitation or un-addressed organisational politics", but is adept at raising awareness of how we co-construct our image(s) of ourselves and our future.

Previous research suggests that AI gives insufficient attention to deconstructing the status quo (Ridley-Duff & Duncan, 2015), avoids discussion of 'negative' experiences (Grant, 2006; Boje, 2010), and over-emphasises positive thinking rather than generative questioning (Bushe, 2007, 2013; Cooperrider & Srivastva, 2014). Gergen's (2014) foreword to *Organizational Generativity* (a volume of works on AI) realigned AI to focus less on positive experience and more on

generative questioning and critical debate (see also Bushe, 2013). He argues that participants can use AI to challenge assumptions and furnish themselves with actionable alternatives.

It is this aspect of AI that speaks to the field of CSE through a commitment to generating ideas and opportunities through co-operative deliberation and action. Stimulating generative capacities using AI enables the co-construction of new realities based on new social relationships — something that could be seen as a defining characteristic of CSE. van der Haar and Hosking (2004) frame this approach as relational constructionism, whereby interaction and dialogue between participants facilitates the co-creation of possibilities. Thus participants can 'be with' rather than 'for' or 'against', and local ontologies and realities can be accommodated within the process. This focus on generative capacity, dialogue through relationship building and dealing with local realities is a good fit with the claims made by advocates of OPERA (Slaen et al., 2014, pp. 43-44).

This more critical approach to appreciative inquiry (CAPs) encourages a focus on 'what is?' and 'what might have been?' as well as 'what is good?' This can enhance co-operative members' capacity "to know, to be more conscious of, to take full and sufficient account of" a situation (Grant, 2006, p. 286). CAPs, therefore, are designed to allow participants to develop alternatives to the status quo and resist discourses that might interrupt attempts to share power and wealth more equitably (Ridley-Duff & Duncan, 2015, p. 1582). Having reviewed AI and CAPs — and its potential for CSE — we now turn our attention to OPERA as a learning process. In doing so, we highlight its assumptions regarding participatory practice and comment on its alignment with CAPs.

OPERA

OPERA is presented as a holistic participative process developed by Swedish consultants working for Innotiimi (Slaen et al., 2014). The authors claim that it challenges hierarchical dominance in meetings so that co-operative learning can occur in teaching, education and planning contexts. Underpinning the process is a desire to counter the negative effects of extroversion by providing more support for introverts. An individual's fear of group critique is managed through the process of engagement. Participants start by considering their own ideas before working in pairs to generate ideas for further discussion. Beginning with a topic/question of focus, the process has five stages:

- O Own ideas — each person works independently to think of their responses to the topic/question posed.
- P Pairing — building on the assumption that working in pairs is a 'safe' way to discuss ideas, people share their responses with a partner.
- E Explaining — each pair decides which ideas to present to others. These ideas may be related to the initial question posed or something that surfaced in discussion.

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

- R Ranking — each pair casts several votes for ideas they want to continue. Only one vote can be cast for their own ideas.
- A Arranging — statements that receive no votes are set aside and the remainder are arranged into common themes to clarify future actions.

OPERA separates idea generation (OPE..) from evaluation (..RA). Slaen et al. (2014) argue that the generation process is inhibited if participants face immediate evaluation of their ideas. The first three phases, therefore, emphasise positive selection rather than critique (pp. 28-29). Time is not wasted on ideas with no support and the pairing process protects individual egos and

promotes a focus on ideas, not messengers. Protecting egos is important because participants need to remain engaged even if their ideas are not selected.

Importantly, pairs can only select one of their own ideas during ranking to promote listening, engagement and evaluation of other ideas. Furthermore, Slaen el al. (p. 28) distinguish 'critical' and 'creative' sides of the brain by drawing attention to studies that show the 'critical brain' is engaged when there are few ideas but the 'creative brain' is engaged when there are many. The emphasis on creativity and positive selection prevents destructive critique, aligning the process with AI principles.

Unlike AI, OPERA accommodates 'deficit-based' questions amongst nine question types (pp. 31-34):

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

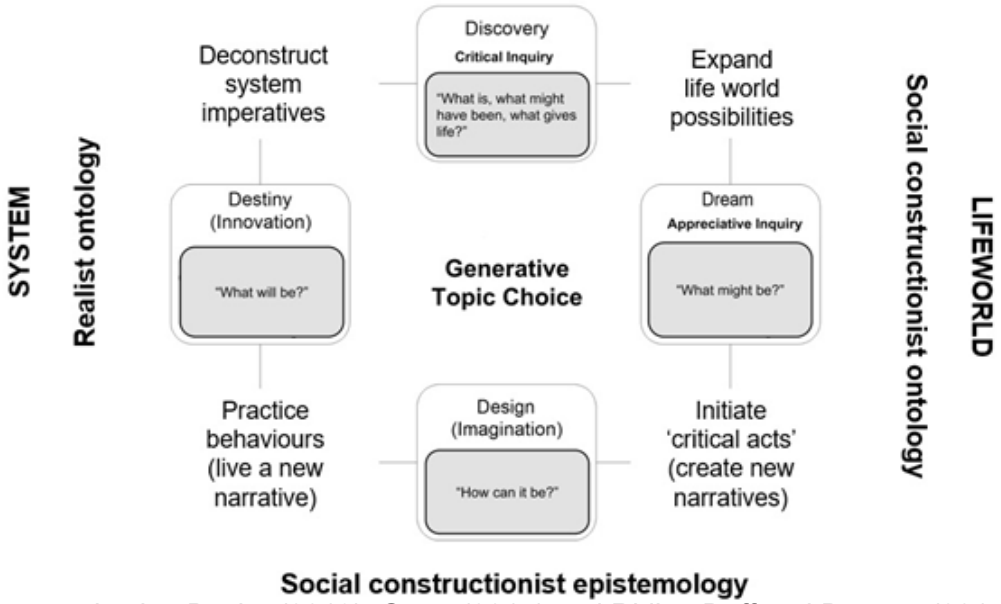
OPERA practitioners, therefore, are agnostic on whether questions should be framed to elicit positivity, but are clear about the positive selection process for responses. Like AI, OPERA's mechanisms for decision making are designed to help people feel secure in themselves and within the group, and to positively select good choices, rather than debate or destroy poor choices. We now turn to the methodology deployed to inquire into OPERA, and the 'mechanisms' it triggers.

Methodology

Our research approach is rooted in a critique of functionalist theories of management by paying attention to context-specific know-how that is socially constructed by local actors (Moreau & Mertens, 2013). Our earlier contributions to the critical turn in appreciative inquiry are based on a Habermasian view of systems and lifeworlds (Habermas, 1987).

Figure 2 shows the dual ontological assumptions that we made during this study. Within the lifeworlds of individual actors there is an inter-subjective reality that shapes each person's construction of the here and now ('what is, what might have been, what gives life?'). These, in turn, are expressed through narratives (both practice-based and spoken) that guide and shape the choices we consider 'what might be?'. In this sense, reality is a social construction, produced and projected through social practices and spoken articulations of the choices we make 'how can it be?' (Gergen, 2014). However, we also used participant observation techniques to examine mechanisms that shape 'how things work' 'what will be?' (Pawson & Tilley, 1997, 2001; Watson, 2011). In the destiny phase of AI, a realist perspective prevails because not all behaviours are possible in each context, and actions can have consequences based on the way rules are acted upon. Our philosophy is social constructionist in its epistemology, but variable in its ontology because we recognise both the subjective realities that guide action and the constraints in social systems that prevent learning mechanisms from triggering if a setting is not conducive to learning (Pawson &Tilley, 1997).

Figure 2: A critical Appreciative Process Initiated by a Generative Question



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

We participated in four OPERA sessions run by Social Enterprise Europe Ltd (SEE) between July 2014 and April 2016. After the first two, we retrospectively collected photos and statements of outcomes published by SEE under Creative Commons licences. In the third session, we negotiated the initial question and made separate reflective diaries detailing our experiences as participants. In the final session, one researcher created a reflective diary of co-facilitating the OPERA session with SEE's facilitator. After observing, participating and reflecting on the four OPERA sessions, we tested the process in our own teaching and development work to assess the trustworthiness and authenticity of our theoretical conclusions (Lincoln & Guba, 1986).

Four field opportunities to study OPERA were selected (Appendix A). Hosts were practice-oriented SE professionals engaged in management education. For example, the FairShares Association describes itself as a network of consultants, educators and social entrepreneurs that supports management education by publishing books, research instruments, learning resources and model rules for multi-stakeholder co-operatives (www.fairshares.coop). Social Enterprise Europe Ltd. describes itself as a co operative network of educators, consultants and social enterprise advocates that "create courses and materials that lead to the effective management of social enterprises". Lastly, the Co operative College (2016) has operated for 100 years "providing world class learning programmes" that develop "successful and diverse" co-operatives.

Data collection followed a process of naturalistic inquiry (Lincoln & Guba, 1986) by waiting for opportunities to observe and participate in sessions run by a qualified OPERA specialist. We accessed photos of all sessions plus published statements of the outcomes and decisions made. We limited our interventions to negotiating the opening question in sessions 3 and 4. The authors' reflective diaries (sessions 3 and 4) added over 5,000 words describing details of OPERA practices and providing early (in situ) reflections. Both authors coded all reflective diaries against eight elements of a CAP. To improve rigour, we also coded our notes on OPERA documentation (Slaen et al., 2014) and worked through an online version of OPERA to compare online and printed documentation. The next section shows our findings.

Findings

The tables below compare claims in OPERA documentation to our fieldwork experiences. We use abbreviations for the five OPERA processes: O = Own Ideas, P = Pairing, E = Explaining, R = Ranking, A = Arranging. Our findings (see Table 1) suggest that the first two phases (O

and P) were successful at generating a considerable number of statements. In session one, 25 ideas were explained by 12 pairs. In the second, 26 ideas were advanced by 11 pairs, with 14 ideas from 7, and 17 ideas from 8 in the third and fourth sessions.

Table 1: Discover — Dream Phase

CAP - OPERA documentation	Fieldwork
1. 'Discovery' (Critical Inquiry)	
"How does OPERA assist with the discovery of 'what is, what might have been, and what gives life?'"	
Use "what" questions (S1, p. 11) during the O phase (S1, pp. 13-15). Phase 1 is fully supported in the app allowing both synchronous and asynchronous operations. The app asked whether to initiate audio and camera when joining.	Participants were given an opportunity to generate their own ideas during every O stage. In all cases, this was followed by a random 'pairing' technique. New ideas were sometimes generated during P after thoughts/ideas were exchanged.
2. Expand life world possibilities	
"How does OPERA generate critical appreciation that sensitises participants to meanings given to their world?"	
(Book and app documentation identical.) Use "what" questions (S1, p. 11). O and P phases change dynamics between introverted and extroverted people, and overcomes limitations in group processes to generate more perceptions (S1, p. 8). The O phase encourages a plurality of voices (S1, p. 13) while the P phase sensitises people to 'others' (S1, p. 15). The E phase sensitises the wider group, but inhibits dialogue (S1, pp. 17-19). R phase encourages sensitivity to others' ideas as you can only vote for one of your own (S1, pp. 19-22).	During the O phase "participants [were] asked to respect the space of others" and "to think quietly". The facilitator emphasised the value of having 'your own thoughts'. Shy, introverted participants reported that they appreciated the ability to 'gather their thoughts'. The quietness of the room during the O phase was replaced with a buzz of discussion during the P phase. The P phase was guided by the idea "it is easier to share ideas with one other person than with a whole group". The E phase gave pairs an opportunity to expand each other's lifeworlds and generate sensitivity. Starting with a 'positive' question did not guarantee positive responses, but "starting small greatly increases the total number of outputs/responses generated". People looked relaxed during the P phase.

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

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

> Teams, in this line of research, represent a rich source of production losses in the form of social inhibition … production blocking, and cognitive interference … which is rarely outweighed by the cognitive stimulation that the ideas of others may provide.

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

In moving from P to E (Table 2), participants start to engage in 'critical acts' (Arendt, 1958). The switch from sharing ideas to writing them down requires a move from verbal to written

articulation of ideas. We found this phase generated well-articulated statements that contributed to outcomes published after the session (see Appendix B). While the E phase gave relatively little opportunity for critical comment, an opening resurfaced during the R phase as pairs reviewed ideas and decided how to vote. The time allowed (5 to 10 minutes) was insufficient to systematically study and investigate ideas before they are ranked. However, the OPERA documentation suggests 'chaining' OPERA sessions (i.e. following the selection of an idea by repeating the process to deepen knowledge into their specific idea).

Table 2: Dream — Design Phase

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

R phase generated more narratives as pairs made sense of what to vote for (critical narratives generated). R phase provided an opportunity to challenge the 'status quo' through voting for unusual (original) ideas. R phase decides which (new) narratives will dominate (it is useful to note that little proactive deconstruction of dominant discourse was present, just advancement of preferred discourses).

While it is not possible within an OPERA to 'live a new narrative', we did find the foundations for doing so were laid in one setting. In session 1, participants selected five priorities for the FairShares Association. Each were posted to an online discussion and decision-making space (www.loomio.org). Some were still active two years later, particularly 'Getting FairShares Discussed Everywhere' (https://fairshares.loomio.org). We found discussion in another 'Establish Pilot Enterprises' that reported on the incorporation of new FairShares enterprises in both the UK and USA.

Table 3 shows findings from the 'design' part of the CAP cycle:

Table 3: Design — Destiny Phase (Reflective Note Analysis)

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

Grouping ideas in the A phase of an OPERA enables clusters to be re-conceptualised. This occurred in three of the four sessions (five themes in session 1, three in session 3, and three themes in session 4). In session 2, only a ranked list of items regarding 'When the FairShares Model is at its best' was sought, so ideas were not arranged into clusters.

Arranging (phase A) is part of the design cycle of a CAP as it requires participants to abstract and cluster concepts, then find a language to describe them. In Slaen et al., (2014), the A phase was presented as a precursor to asking people to take responsibility for new activities. Such allocations took place in session 1 as different members of the FairShares Association took responsibility for different priorities. However, the A phase can also involve grouping ideas into articulate statements. In sessions 3 and 4, statements were crafted and reported back to conference delegates and organisers (see Appendix B). Lastly, we report findings on Destiny — Discover when future behaviours are practised and deconstructed by examining how things are at present (Table 4).

Table 4: Destiny — Discovery

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

Theoretical Conclusions

OPERA can generate narratives. However, when the AI phases were combined to reflect the 4D cycle, a trend became clear. The influence of OPERA was strongest on the first part (Discovery, Dream), and weaker in the second part (Design, Destiny). We observed an approximate 60:40 ratio (see Table 5). We recorded that "in 'pairing', selection of important ideas is effectively a critical act" and that "there are more critical acts in 'pairing' than 'explaining'".

In the context of narrative generation, we reflected on how critical these acts were. Does OPERA promote critical appreciation in the sense advanced by Grant (2014) and Ridley-Duff and Duncan (2015)? Are the participants identifying Habermasian system imperatives, resisting colonisation of their lifeworlds or engaging in transforming learning? Participants' 'critical acts' were often just significant observations and did not involve any detailed deconstruction of the status quo, or identification of hegemonic discourses.

Table 5 – Session 2 Evidence of OPERA mechanisms influencing CAPs

AI Phase	CAP Element	Unambiguous evidence ("maybes" excluded)	Total	N + %
Discover	1 Discover	6	13	32 (61.5%)
	2 Expanding life world possibilities	7		
Dream	3 Dream	8	19	
	4 Initiate 'critical acts'/narratives	11		
Design	5 Design (imagination)	5	12	20 (38.5%)
	6 Practice behaviours	7		
Destiny	7 Destiny (innovation)	5	8	
	8 Deconstruct system imperative	3		

Table 5 shows the number of times OPERA processes unambiguously acted as a mechanism (Pawson & Tilley, 1997) to support one or more aspects of a CAP (see Tables 1-4).

In session 3, there was a much higher level of critical engagement due to the choice of question "How can studying the social solidarity economy revolutionise enterprise education?" The output of this session included the following response:

> By making the solidarity economy a necessary (required) component of business and management courses, it ensures that social values and democratic decision-making become central to enterprise education. Studying the solidarity economy challenges cultural assumptions based on individualism, consumerism and greed … questioning the above can alter a person's world view (Themes 1 and 3, SE Education Conference, York St John's University, August 2015).

Hence we observe that OPERA processes can stimulate a process that challenges cultural assumptions and critically engage with a dominant discourse on 'individualism, consumerism and greed'. Nevertheless, these responses were prompted by the question, rather that the process. Amongst our general observations, we noted:

- The nature of the question is important. The extended discussion of question choices in Slaen et al., (2014) shows that they can be directed at different parts of the CAP cycle.

- The OPERA process generates more ideas than brainstorming or a roundtable discussion. The process makes it easier for people to explain their idea to the whole group by allowing them to 'collect their thoughts' in the O and P phases.

- The R phase is appreciative in the same sense that AI is appreciative. All ideas that survive have been positively screened three times (once when they were chosen, once when they were selected by a pair, and finally when they secure votes).

- The R phase could be influenced by other teams — people crowding around the OPERA board hear snippets of other discussions. The facilitator can also influence voting criteria. Whilst such influence would not occur online, it could influence face-to-face meetings.

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

We also arrived at an understanding that the process could be made more robust. For example, the online app asked participants to add text to explain why they have advanced ideas. Participants could also be asked to add text to show the rationale behind their ranking choices (voting) in face to face meetings. This action would make the process of thought more explicit. This insight is important given the facilitator's power to steer the discussion in a direction they prefer.

Furthermore, while trialling OPERA in teaching contexts, we experienced tensions and realised that bias may be unintentional or deliberate. We found ourselves having to consciously stop screening out ideas at the E stage (on the basis that they did not answer the question asked), and also had to discipline ourselves not to comment on ideas while they were being explained by participants (to avoid influencing voting). We also experimented with the process by asking

participants to vote only for ideas they have not put forward (to increase engagement with others' ideas and promote more listening). This had the effect of being more selective, and giving a higher level of credibility to selected ideas (because they had been validated three times instead of two to remain in the process).

Grant (2006) identified similar issues in AI. She questioned the power of the facilitator to determine what is deemed 'good' or 'positive', and noted their power to steer conversations towards the 'positive'. However, while noting these limitations, we found that the OPERA process itself (notwithstanding the views of the facilitator) mitigates the danger of single individuals taking control of the process. OPERA is not a process that a dominant individual or CEO would favour if control of decision-making was their goal. Finally, we conclude by answering our RQ: "What learning mechanisms are triggered by OPERA, and do they catalyse CAPs amongst practice-oriented SE professionals?"

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

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

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

Our conclusion, therefore, is that OPERA offers a new way to be appreciative through positive idea selection and contributes to CSE. OPERA provides a useful addition to the methods that can be deployed in support of participatory democratic management, and that it emphasises the development of local realities. Further research is needed to see whether different opening questions can further enhance its contribution to CAPs. For example, by asking deficit-based questions (e.g. "What problems do we have doing/operating in x?"), descriptive questions (e.g. "What factors influence x?") and purpose setting questions? (e.g. "Why do we want to lead on this issue?"), would there be more focus on deconstructing the status quo alongside positive selection of preferred critiques? We also see value in studying two consecutive OPERA sessions (Slaen et al., 2014) by posing a critical question first (CI) and following this with an appreciative question (AI) to more fully address the CAP cycle.

We find that OPERA introduces new behaviours that enable group members to rapidly acquire 'know-how' and develop local knowledge in support of CSE. As a result, OPERA can advance the democratic management and stakeholder participation desired by SE managers. In terms

of contributing to the core competencies of CSE identified by Moreau and Mertens (2013), we suggest the value of OPERA resides in the mechanisms that stimulate generativity. We recommend that facilitating OPERA become a core competence for CSE education on the basis that it supports member participation in governance and management and develops relevant skills and abilities.

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Appendix A – Field Sites for studying OPERA

A summary of the four OPERA sessions

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

Appendix B — Statements published after OPERA sessions

Session 3 — SE Education Conference

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

Participant Responses:

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

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

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

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

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

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

Session 4 – Co-operative Education Conference

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

Participant Responses:

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

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

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

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

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

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