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# Sustaining the critical in CHRD in higher education institutions: the impact of new public management and implications for HRD

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## ABSTRACT

Adoption of Critical Human Resource Development (CHRD) and its capacity to change practice is influenced by the political context. HRD professionals learn to challenge their political context through CHRD teaching and research in the 'safe space' of Higher Education Institutions (HEIs). Yet, the increasingly global discourse of New Public Management (NPM), associated with what we call *new performance measurement*, constrains engagement with CHRD. This paper demonstrates the impact of NPM and research performance measurement on HRD scholarship, CHRD agendas, HRD professional development and HRD practice through discourse analysis of Impact Case Studies and their underpinning research as presented in the UK government's 2014 Research Excellence Framework (REF 2014). Use of national research evaluations with a focus on impact is currently spreading across the globe, and so is of international significance. We identify that although CHRD is consistently adopted in underpinning academic research publications it does not transfer into written impact cases. We conclude that context has the power to silence CHRD, and we challenge CHRD scholars to seek alternative formats to inform practice that do not disguise potential negative impacts. We also caution that silencing critical academic voice diminishes the ability of pedagogic curriculum to challenge and enhance HRD practice.

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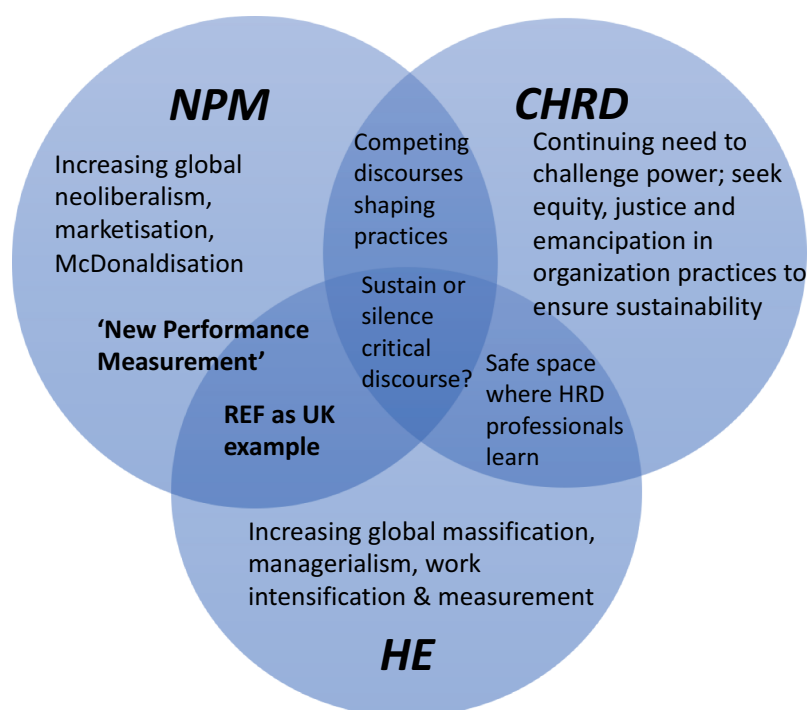
HRD discourse; critical HRD; impact; power; REF 2014

## Introduction and scope

The focus of our paper centres on the intersection between the rise in New Public Management (NPM), the increasing use of performance measurement in Higher Education Institutions (HEIs) and the consequences for sustaining or silencing Critical Human Resource Development (CHRD), illustrated later in [Figure 1](#). We provide an example of the impact of NPM on HEIs in the United Kingdom (UK) and highlight the implications for attempting to sustain CHRD research, pedagogy and practice. We use REF 2014 as an exemplar illustrating the impact of NPM on CHRD, through competing discourse. REF 2014 was the UK government's procedure for evaluating research quality within HEIs and has been replicated in 2021, thus has contemporary and international

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**Figure 1.** Intersection of NPM, HE and CHRD.

significance since, as Sivertsen (2017) argues, the UK REF has been influential in the rise of such evaluations across the world. Evidence of NPM is increasingly evident in HE around the globe, with the continuing shift in operations associated with massification, marketisation, and other forms of new public management (Tomlinson and Watermeyer 2020). This is associated with discourse focusing on the McDonaldisation of practices, demanding conformity and compliance and ever-increasing performance measurement (Ritzer 2018). Such a discourse pursues objectivity, economic benefit, and market value from a representationalist perspective. This is in stark contrast to CHRD discourse, which challenges power and performativity in attempts to enhance equity, justice and emancipation in organisations to enhance sustainability. We present an exemplar revealing one way NPM may silence CHRD through changing the discourse. Tomlinson and Watermeyer (2020, 8) argue that 'Governments have endorsed the view of the benefits of HE in principally economic terms and which can be measured in economic terms (i.e. individual returns on human capital and more aggregated GDP gain)'. One of the dominant features of HE policy in most national contexts is the equation of value to economically based outcomes, including students' employability and the relative market value of degrees – hence the foregrounding of 'value for money'. We use one aspect of the UK's REF 2014 research evaluation exercise to demonstrate how attempts to communicate CHRD research, published independently in academic journals, have been silenced in the writing of REF Impact Case Studies (ICSs), used to expound societal and economic benefits of the published research. We caution that such attempts to silence CHRD have far-reaching consequences for CHRD education, where HEIs provide

a unique but increasingly vulnerable safe space to develop critical HRD professionals, better able to understand and challenge their practice contexts.

Higher education is a suitable site for examining how NPM discourse shapes CHRD research, pedagogy and practice, as HE pedagogy encompasses both the provision and practices of HRD (Doloriert, Sambrook, and Stewart 2012; Anderson 2020). A ‘critical’ approach offers a more context-sensitive account of HRD, analysed as a set of internal practices embedded in an uncertain ‘global, economical, political and sociocultural context’ (Janssens and Steyaert 2009, 143). Sambrook (2014, 150) argues that CHRD provides opportunities to ‘question taken for granted assumptions and consider more carefully why and how learning is encouraged and facilitated’ in this contested context. CHRD can be considered significant for a number of reasons, most of which are based on contrasts with traditional approaches to HRD (Trehan and Rigg 2011). One way is to counter the role of traditional HRD in ignoring the negative impacts of capitalism and globalisation. Examples include the passive role played by traditional HRD in the global financial crisis of 2008 (MacKenzie, Garvan, and Carbery 2014) and traditional HRD’s exclusive focus on economic and financial performance to the detriment of social and cultural benefits (Stewart et al. 2014). The concern with the negative impacts of capitalism and globalisation are receiving renewed attention (Rooney 2019) with New Zealand’s Prime Minister among others calling for a revised capitalism to address both social and economic inequalities (Rashbrooke 2019). Traditional HRD is unlikely to contribute to such movements and hence CHRD, with its focus on changing power relations and its wider social concerns, is arguably of increasing relevance as an approach to developing individuals, groups, organisations and communities.

CHRD encompasses what is termed critical education (Gold and Bratton 2014) and critical pedagogy (Perriton and Reynolds 2018), as forms of developing CHRD professionals. CHRD scholars have called into question ‘whom and what HRD is for’ (Trehan and Rigg 2011, 277–8) and drawn attention to the power relations underpinning HRD practice (Baek and Kim 2017). Through such analysis, it has been argued, CHRD scholarship may redefine HRD practice (Vince 2005), contributing to the emancipation of learners/employees (Sambrook and Poell 2014). However, adoption of CHRD within higher education and its consequent ability to change organisational practice is itself influenced by political context (Sambrook 2014). We draw on the UK government REF 2014 policy to demonstrate how despite underpinning research revealing aspects of CHRD, the associated impact case studies encouraged these to be suppressed and economic benefits promoted. Such political influence silences CHRD researchers’ voice, thus effectively constraining opportunities to challenge dominant, oppressive practices. There is therefore a need for CHRD scholars to be reflexive and consider both ‘the extent to which we have the power and influence to take this critical agenda forward’ and why we seek to do so (ibid., 158).

Thus, our research addresses the following specific questions.

- How does the political context of NPM influence discourse of HRD scholarship?
- To what extent does this discourse reflect CHRD agendas?
- What are the possible implications of this discourse for HRD and CHRD research, pedagogy and practice?
- How can CHRD be sustained in HEIs in a context of NPM?

This paper presents the findings of a project which explores these questions through analysing how HRD scholarly discourse shifts in response to different (and potentially competing) performance demands in the UK's NPM-type research evaluation procedure, REF 2014. HRD researchers are required to publish in top-rated journals, where they are able to articulate CHRD discourse and challenge practices. Yet, demands to communicate economic impact through ICSs highlight how such critical insights are then silenced. We conclude that HRD discourse can be articulated and then manipulated within different HE political and performance measurement contexts (journal publication versus impact case study). We assess the impact of those contexts upon the adoption of CHRD discourse and the implications for CHRD practice.

We make three contributions. First, we identify how a specific aspect of NPM, which we term new performance measurement, is shaping research evaluation in the UK HE system (REF 2014), and could affect other similar research evaluation processes globally. Second, we provide evidence of how communicating impact within REF 2014 Impact Case Studies has attempted to silence CHRD. We argue this evidence illustrates the potential decline in opportunities for communicating critical approaches to HRD (through both diverse approaches to teaching and research) in other countries adopting NPM and REF-type assessment. We contribute to understanding of the approach taken to preparing impact cases in REF 2014 and the 'gaming' (Pinar and Unlu 2020) associated with that element of UK national research assessment. Third, we identify increasing challenges in pursuing the agenda of CHRD, including critical pedagogy. We caution that this has implications for the development of HRD professionals, in the UK and beyond, to understand and challenge their political contexts, resulting in a focus on performativity (Ball, 2003) at the expense of equitable, just, and sustainable organisational practices.

## Theoretical framework

There are three sets of contextual factors which are salient to our project: New Public Management (NPM); Higher Education (HE) and Critical HRD (CHRD).

### *New public management*

New public management (NPM) has been recognised as an international phenomenon (Diefenbach 2009) associated with the global resurgence of neoliberalism (Olssen and Peters 2005). As long ago as 1991, Hood (1991, 3) described NPM as one of the most significant international trends in public administration. Among other features, the common characteristics applied within NPM identified by Lynch (2014) include valuing quantitatively measurable outputs over inputs and process; market-related accountability of public spending; a discourse of customers and competition in place of citizens and rights; monitoring through performance indicators, targets, and league tables. The ubiquity of an emphasis on quantitative measures is illustrated in attempts to include measures of happiness in national populations as relevant data to inform public policy. Examples of this include the Bhutan Gross National Happiness Index (Ura et al. 2012) and the World Happiness Report (Helliwell et al. 2022). These characteristics are also associated with the related concept of new managerialism (Sewpersad, Ruggunan, and

Krishna 2019), which in turn has much in common with Ritzer's (2018) McDonaldisation of society thesis. Taking these analyses, together with Ball's (2003) concept of performativity, we suggest the essence of these global trends is captured in the notion of *new performance measurement*. This formulation emphasises the necessity of quantitative measurement as the key feature of shaping the performance of both individuals and organisations, and as a means of holding both accountable for achieving required performance outcomes.

### **Higher education**

New performance measurement is increasingly evident in HE around the globe, with the continuing shift in operations associated with massification, marketisation, and other forms of NPM (Tomlinson and Watermeyer 2020). Examples of new performance measurement include the expansion and application of university league tables, e.g. the UK-based THE World University Rankings, the US-based QS World University Rankings and the China-based Academic Ranking of World Universities. In addition, journal ranking systems for example, the UK Chartered Association of Business Schools (CABS) list as well as others such as the VHB-JOURQUAL for German-speaking nations and the ABDC list in Australia, are used specifically in business and management (see Stewart and Sambrook 2019; Anderson, Elliott and Callahan 2020 for discussions of the CABS list). These specialist rankings are in addition to internationally applied citation-based measurements of journal quality such as Clarivate and Scopus. All of the indicators are used as quantitative measures of the quality of universities and the work of individual academics.

There are long recognised and standing problems with the use of quantitative indicators. For example, Campbell formulated his laws in 1979 which posit that 'the more any quantitative social indicator is used for social decision-making, the more subject it will be to corruption pressures. and the more apt it will be to distort and corrupt the social processes it is intended to monitor' (Campbell 1979, 85). These laws are also used by Fire and Guestrin (2019) in their analysis and critique of the metrics of academic publishing. The critique also cites Goodhart's law which the authors state as positing that 'when a measure becomes a target, it ceases to be a good target' (1). Thus, the notion of new performance measurement is consistent with previous critiques of the use of quantitative indicators.

### **REF 2014**

An additional example of new performance measurement applied to higher education is the growing use of research assessment and evaluation by national governments in judging the performance of universities. This practice includes countries across Europe, e.g. Belgium, Norway and Italy as well as the UK; and Asia and Oceania, e.g. Australia, New Zealand and currently being developed in China. While the USA has no government managed national system, the use of UMETRICS is well established. National systems are increasingly seeking to assess and measure societal impact of academic research as an indicator of research quality (OECD 2014; Sivertsen 2017; Rowlands and Gale 2019). This phenomenon suggests that examining methods used to

judge research quality is of increasing significance internationally to both HRD academics and, as users of research, HRD professionals.

The approach adopted in the UK to national research assessment and evaluation had been internationally influential in this development (Sivertsen 2017). In the UK, the REF-related funding is allocated to individual universities based on an assessment of the quality of each university's research. In 2014, there were three elements to the assessment: judgements of research outputs, most commonly in the form of journal articles; the level and quality of societal impact associated with the research of the assessed staff of each university, judged by impact case studies (ICS) and against the criteria of significance and reach of the impact; and an assessment of the research environment supporting the research activities in the university. We focus on the ICSs. ICSs were written in a standard and prescribed format and were required to be based on, or derived from, research of at least, in REF terms, 2\* quality (REF2014 2011). To achieve 2\* status a research article must be recognised internationally in terms of its originality, significance and rigour. The standard format of ICSs required evidence supporting the implied claim that the associated research met that quality standard. It also required statements and sources of evidence of the impact. In the cases analysed here, the evidence of research quality are the published research outputs listed in the standard template.

There are two important points to note on ICSs. First, individual academics who produce the original published research may not be involved in, or even have knowledge of, their research and associated outputs being utilised by their university in an ICS. This is clear from the survey reported by Watermeyer and Tomlinson (2021) which found surprise from some respondents that their research had featured in an ICS submitted by their employing university. There is also a burgeoning of consultants offering ICS writing advice and services (Davies, Yarrow, and Syed 2020). The second point is that the manner and style of writing in ICSs was of more importance in rating decisions than the quality of either the underpinning research, or of the actual impact (Watermeyer and Hedgecoe 2016); Reichard et al. (2020). This highlights the importance, and dynamic nature, of academic discourse within NPM forms of governance.

### ***Critical human resource development***

The significance of competing discourse is central to CHRD research and practice. We have already noted the importance of CHRD in understanding the dynamics of power relationships and identifying social inequity. One way in which CHRD can be achieved is through a discourse perspective. Doing so opens up the possibility of a 'discursive space' to challenge dominant discourse within the field, enabling a more critical stance (Lawless et al. 2011, 264). CHRD recognises that HRD is a social and discursive construction in that it is enacted through how it is thought about and practised (Sambrook 2000), all achieved through talk (discursive action). A discourse perspective focuses on this talk, the choice of discursive resources employed (what can and cannot be said) and to what effect. For example, executives talk up strategy, highlighting economic and financial performance over human concerns for meaningful work and decent working conditions, demonstrating a dominant performance discourse. Trainers accomplish their practice through talk, telling employees what they need to learn to perform, yet often failing to negotiate learning needs with them, which would suggest a (competing) learning



discourse. A discourse perspective to CHRD scrutinises what is talked about and how, highlighting the need to give voice to marginalised stakeholders and change the content of the talk to effect change in practice.

CHRD provides opportunities to ‘question taken for granted assumptions’ (Sambrook 2014, 15), and Trehan and Rigg (2011) identified four specific assumptions of traditional HRD which CHRD might challenge. The first is that the focus of HRD is the improvement of performance, whether of individuals or organisations, defined predominantly in economic terms (*ibid.*, 279). This assumption underpins the performance discourse which has been identified as a dominant discourse of HRD (Corley and Eades 2006). More critical approaches question this acceptance of the hegemony of capitalism (Sambrook 2014) and management’s performativity agenda (Bierema and D’Abundo 2004). CHRD scholars call on HRD to reflect upon whose interests it serves (Callahan 2007), arguing that HRD should have other goals such as social justice (Byrd 2018), social change (Trehan, Rigg, and Stewart 2006) and human flourishing (Kuchinke 2010). CHRD might therefore be manifested in discourse which challenges a performativity focus, specifically through the adoption of non-economic discourse and demonstrating concern with impact other than on societal economic or organisational financial performance.

The second assumption of traditional HRD is the existence of the rational, autonomous self, following humanist perspectives (Trehan and Rigg 2011). Learning discourse, identified as the second dominant HRD discourse, may be seen to fall within this tradition in its focus upon the facilitation of individual learning (Corley and Eades 2006). However, the humanist tradition within HRD has been criticised for ignoring power relations which limit individual agency and make development opportunities open only to some (Trehan and Rigg 2011). More critical approaches, in contrast, have focused upon these power structures and argued that the role of HRD should be to emancipate individuals and groups from unequal power relationships (Sambrook and Poell 2014). A second way in which CHRD might manifest itself is therefore through discourse which challenges humanist assumptions, recognising power relations limiting individual agency, and attempting to change existing power structures.

Representationalist organisation perspectives are identified as the third assumption of traditional HRD (Trehan and Rigg 2011). Traditional HRD reifies organisations, conceiving of them as ‘things’ (*ibid.*, 282). Thus, for example, the purpose of HRD has been stated as being to ‘help organisations find answers to important questions’ (Jacobs 2014, 16). These approaches to HRD adopt a unitary frame of reference (Fox 1973), assuming the organisation is a community with a common interest. By contrast, pluralist perspectives identify a range of different and conflicting interests within organisations (*ibid.*) which, according to the more radical of these perspectives, are underpinned by deep political inequalities. Critical approaches have therefore argued that HRD should recognise interactions of stakeholders within and outside organisations and the plurality of interests they hold (Fenwick and Bierema 2008; Baek and Kim 2014). Other work has argued that the focus of HRD should go beyond organisational boundaries (Rigg, Stewart, and Trehan 2007; Elliott 2016). In relation to representationalist organisation perspectives, therefore, CHRD might be manifested in discourse which recognises a plurality of interests within organisations and avoid reifying organisations.



The final assumption of traditional HRD which CHRD might challenge is the adoption of pedagogical methods which pay little attention to politics and emotion (Trehan and Rigg 2011). More critical approaches have therefore argued for recognition of the power structures underpinning HRD practice (Baek and Kim 2017) and, as Callahan argues (Callahan 2007), the different interests HRD may serve. In so doing, they argue that HRD may benefit some groups rather than others and that ‘the very structures within which we [HRD scholars and practitioners] work are inevitably controlled by those in power’ (ibid.: 79). Indeed, it has been argued that implementing CHRD in practice is more challenging than articulating it in theory (Trehan et al. 2007) due to the resistance it may face from powerful groups (Sambrook 2014). Such approaches also draw attention to the limitations of HRD expertise, arguing that discourse constrains HRD (Callahan 2007) and has ‘power to limit options for thinking and doing’ (Corley and Eades 2006, 38). Further evidence of CHRD may therefore be found in resistance to traditional pedagogical assumptions, specifically through discourse which shows awareness both of those who benefit from and those who lose from HRD interventions, and a lack of assumption of HRD expertise and agency.

There is much here that reflects research and writing on Critical Performativity (Leca and Cruz 2021). As Butler, Delaney, and Spoelstra (2018) note, there are tensions, contradictions and a need for compromise when critical approaches engage with practice and practitioners. These tensions create difficulties for critical scholars seeking to have impact outside of academia, a point of direct relevance to research evaluation adopted by national governments, and arise in part from the inevitable politicisation of research (Chelli and Cunliffe 2020). In summary, CHRD scholars face significant challenges in achieving their aims while also satisfying managerial demands for impact outside of the academy.

These three inter-related contexts provide the backdrop to our study. They reveal managerialist cultures within universities, pressures on academics to not only publish their research but also to demonstrate associated societal (economic) impact, and finally changing approaches to the way academics communicate the results of their research. NPM may in part explain increasing performance measurement within HE and shifting (and even silencing) of CHRD discourse. Managerialist cultures, combined with the need to demonstrate societal impact, may help to explain changing approaches to academic communication and the potential silencing of critical voices. That being the case, our research is relevant to the wider international HRD context in exploring differences between research reported in academic journals and the way the same research is utilised in REF 2014 ICSs and other similar global research evaluation procedures. It also has particular relevance to wider international debates about the application and efficacy of critical approaches to the practice of HRD.

## Methodological techniques

The use of discourse analysis is now common in exploring and examining differences in reporting academic research across varying contexts and time periods (see for example Zou and Hyland 2019; Reichard et al. 2020; Hyland and Jiang 2021). Using analyses of discourse employed in the REF 2014 impact case studies is also established as a line of enquiry (e.g. Watermeyer and Hedgecoe 2016; Reichard et al. 2020). The project reported

here adds to this existing body of work by comparing the discourse used in two related but varying contexts, i.e. when scholars report the results of their research in academic journals and when the same research is used to write Impact Case study templates for REF 2014. To enable us to identify how the political context, in this case UK Government Policy, affects discourse of HRD scholarship and the extent to which this discourse reflects CHRD agendas we undertook discourse analysis of Impact Case Studies (ICSs) submitted to the UK REF 2014.

ICSs were required to be based on, or derived from, research that is recognised internationally in terms of originality, significance, and rigour. The format of ICSs required completion of a standard template, and evidence supporting the implied claim that the associated research met that quality standard. In the cases analysed here, the evidence of research quality is published research outputs listed in the template. The submissions also required statements and sources of evidence of the impact. Given the different political contexts for which the underpinning research and the templates were written – the former to meet journal quality requirements, and the latter to demonstrate external impact to REF reviewers – we compared the discourse of the ICS templates and the published outputs detailing the research from which impact was derived. Our approach of comparing and contrasting contexts of communicating research and its results mirrors that adopted by Zou and Hyland (2019) in their analysis of differences in academic blogs when compared with the same research reported in journal articles. However, we adopted different techniques which are described in the following paragraphs.

A purposive sample of 5 ICSs was identified. The sampling frame was the list of 25 Business and Management ICSs identified by Ross et al. (2020) as having learning and development, as defined by the UK Chartered Institute of Personnel Development (CIPD) as their subject. Although there are competing definitions of what constitutes HRD and its components (Hamlin and Stewart 2011), as the CIPD is the leading UK professional body for HRD professionals, including academics through its academic membership grades, we judged this to be an appropriate definition to adopt for the purposes of this project. Moreover, although learning and development does not encompass all of HRD, it is one key area of HRD activity (Hamlin and Stewart 2011). While we recognised that this sampling frame is unlikely to have included all ICSs which had HRD as their subject, as some might be from outside Business and Management and others covering HRD topics other than learning and development, our purpose in developing the sample was not to be representative of all HRD ICSs. Rather, we sought to identify whether different political contexts of the ICS templates and underpinning research outputs affected adoption of different HRD discourse and if so whether there were consistent trends in how this was reflected which might have implications for CHRD.

To enable us to investigate the impact of the NPM and new performance measurement context on CHRD, our purposive sample comprised of five cases where the underpinning research outputs involved CHRD discourse, to see whether that CHRD discourse were still reflected in the impact templates. Identification of these five cases was based upon preliminary analysis of the discourses in the underpinning research outputs, specifically whether there was evidence of discourses challenging any of Trehan and Rigg's traditional assumptions of HRD. This preliminary analysis was undertaken by one researcher and subsequently validated by the other four researchers. This purposive

**Table 1.** Evidence of challenging traditional HRD assumptions.

| Traditional HRD assumption                      | Evidence of challenging  |
|---|--|
| Performative values                             | Adoption of non-economic discourse<br>Concern with impact other than on organisational performance                   |
| Humanist assumptions                            | Recognition of power relations limiting individual agency<br>Attempts to change power structures                     |
| Representationalist organisational perspectives | Recognition of plurality of interests within organisations<br>Non-reification of organisations                       |
| Traditional pedagogical methods                 | Awareness of who benefits/loses from HRD interventions<br>Lack of assumption of HRD/HRD researcher expertise/agency. |

sampling resulted in discourse analysis of five ICS templates and twelve journal papers constituting their underpinning research.

Discourse analysis of the templates and underpinning research involved two stages. In the first stage, we adopted Gee's (2011) approach to discourse analysis. This involved using six tools of enquiry: situated meanings, social languages, figured worlds, intertextuality, discourses and conversations, to analyse seven building tasks: significance, practices, identities, relationships, politics, connections and sign systems and knowledge. Our application of Gee's tools of enquiry was informed by analysis of vocabulary, semantic relations, collocations, metaphors, assumptions and grammatical features (Fairclough 2003, 129–133).

Given CHRD's concern with critiquing forms of knowledge and their material effects, we focused on the two building tasks of politics and sign systems and knowledge. The former focuses on how tools of enquiry are used to create particular material distributions or present them as acceptable or not, and the latter on how tools of enquiry are used to privilege or deprive different social languages and ways of knowing. CHRD's focus on forms of knowledge and their material effects also directed our analysis of the journal papers upon the abstracts, which summarise what the authors consider to be the most significant points of the paper, and the section in which the practical implications of the papers are discussed.

In the second stage, we identified whether each impact case study and journal paper adopted CHRD discourse by analysing whether they challenged the assumptions of traditional HRD discussed in the literature: performative values, humanist assumptions, representationalist organisational perspectives, and traditional pedagogical methods (Trehan and Rigg 2011). Based on the preceding literature review, we identified two forms of evidence of critiquing each of these four assumptions, described in Table 1.

The results of the discourse analyses were mapped against this evidence of challenging HRD conventions to reveal if and in what ways they engaged with CHRD discourse. To improve validity, the two stages of discourse analysis were undertaken by one researcher and the outcomes verified by a second researcher.

## Findings

As Table 2 indicates, in each case the written impact case studies submitted to REF 2014 challenged traditional HRD assumptions less than the journal papers in which the underpinning research was presented. In three of the impact case studies, there was no evidence of challenging traditional HRD assumptions, even though between them the

**Table 2.** Evidence of challenging traditional HRD assumptions presented by impact case studies and underpinning journal papers.

| Paper  | Evidence of challenging performative values |  | Evidence of challenging humanist assumptions              |                                     | Evidence of challenging representationalist organisational perspectives |                                  | Evidence of challenging traditional pedagogical methods |   |
|--|---|--|---|-------------------------------------|---|----------------------------------|---|---|
|  | Adoption of non-economic discourses         | Concern with impact other than on organisational performance | Recognition of power relations limiting individual agency | Attempts to change power structures | Recognition of plurality of interests within organisations              | Non reification of organisations | Awareness of who benefits/loses from HRD interventions  | Lack of assumption of HRD/HRD researcher agency |
| <b>Impact case 11,945: 'Emotional Entrepreneurs': Supporting Small Scale Theatre Companies</b>   |   |  |   |                                     |   |                                  |   |   |
| <b>Journal papers:</b>   |   |  |   |                                     |   |                                  |   |   |
| Simpson et al. (2015)  | ✓   | ✓  | ✓   |                                     | ✓   | ✓                                |   | ✓   |
| <b>Impact case study</b>   |   |  |   |                                     |   |                                  |   |   |
| <b>Impact case 22,392: Raising the policy profile of low-paid women workers</b>                  |   |  |   |                                     |   |                                  |   |   |
| <b>Journal papers:</b>   |   |  |   |                                     |   |                                  |   |   |
| Thornley (1998)  | ✓   | ✓  | ✓   | ✓                                   | ✓   |                                  |   |   |
| Thornley (2007)  |   | ✓  | ✓   | ✓                                   | ✓   | ✓                                | ✓   |   |
| Thornley (2006)  |   | ✓  | ✓   | ✓                                   | ✓   |                                  |   | ✓   |
| <b>Impact case study</b>   | ✓   | ✓  | ✓   | ✓                                   |   |                                  |   | ✓   |
| <b>Impact case 23,530: Cross-national Equivalence of Skills and Qualifications across Europe</b> |   |  |   |                                     |   |                                  |   |   |
| <b>Journal papers:</b>   |   |  |   |                                     |   |                                  |   |   |
| Clarke and Winch (2006)  |   | ✓  | ✓   | ✓                                   | ✓   |                                  | ✓   |   |
| Brockmann, Clarke, and Winch (2008)  | ✓   | ✓  | ✓   | ✓                                   | ✓   | ✓                                |   |   |

(Continued)



underpinning journal papers challenged most or all; see [Table 2](#). In the following section, we analyse the discourse used in the different texts and relate them to those traditional assumptions of HRD.

In relation to the first HRD assumption, only two of the impact case studies provided evidence of challenging performative values, even though all but one of the journal papers did so. In case 11,945, for example, the underpinning journal research explicitly discusses the existence of non-economic discourse, noting ‘dominant discourses of originality and creativity ... vie with alternative discourses of commerciality’ (Simpson et al. 2015, 113), and using speech marks to question the appropriateness of economic language such as ‘pitch’ and ‘sell’ (ibid., 112). In the case study itself, however, economic and quantitative discourse is privileged. The case summary states that: ‘Whilst little data exists about the numbers and finances of small-scale theatre companies (SSTC’s) in the UK, they are a vital part of the theatre world whose national worth exceeds £2.5 billion annually’ (Brunel University 2022, 1), and the underpinning research itself is presented in economic terms in the case, as responding ‘to a need to address the low survival rate of SSTC’s and to understand their activities and practices from a small business perspective’ (ibid., 1).

Similarly, impact cases were less likely than the underpinning research to demonstrate concern with impact other than on organisational performance. In case 25,248, one of the journal papers recognises environmental and social outcomes, and argues for ‘a holistic strategy which cuts across government and secures wide buy-in and support from all interested stakeholders’ (Thompson et al. 2012, 342) providing ‘benefits to society as a whole’ (ibid., 341). The case study derived from this research however ignores this perspective and describes the underpinning research as providing insights into ‘business creation, development and growth’ (University of Huddersfield 2022, 2). In focusing solely on performative values, these case studies clearly conformed to the NPM requirements of new performance measurement. Moreover, in ignoring any alternative values which might be compromised, they were better able to present their impact as wholly positive.

However, two of the impact case studies did challenge performative conventions. Case 22,392 eschewed a solely performative focus in addressing ‘mechanisms through which equal pay for all workers is being delivered in the UK’ (Keele University 2022, 3). Case 42,352 claimed to ‘provide business and employee benefits’, although the placing of ‘business’ before ‘employee’ benefits presents non-organisational benefits as secondary to organisational performance, coming after ‘Beyond the clear benefits to the case companies ...’ (University of Strathclyde 2022, 4).

Case studies 22,392 and 42,352 were also the only impact cases to challenge humanist assumptions, recognising that power relations might limit individual agency, even though every underpinning journal paper for each impact case did so. 22,392 recognised a power struggle over how skills are valued, and 42,352 noted that some individuals ‘might be excluded from learning in later life’ (University of Strathclyde 2022, 3). By contrast, while underpinning research for 23,530 consistently adopted labour process discourse, presenting workers as constrained by the social structures within which they are located, and arguing for ‘changes to the labour process’ in Britain, the written case study ignored wider power structures, and presented the underpinning research as aiming ‘to further the recognition of bricklaying qualifications and competences by

enhancing their transparency and comparability'.(University of Westminster 2022, 1) Even though the written impact case for 42,352 recognised that some workers are 'excluded from learning', and claimed to address this, its recognition of and attempt to change power structures constraining learners was more limited than in the underpinning research. There was, for example, no acknowledgement that the 'learners' addressed by the case were exclusively union members and therefore not those most disadvantaged by existing structures – something one of the underpinning journal papers explicitly acknowledged. Barriers and power relations which might prevent individuals from benefiting from their HRD research (and thus limit its positive impact) were therefore often downplayed.

Turning to the convention of representationalist organisational perspectives, none of the ICS templates analysed provided evidence of challenging this. For example, even though the underpinning research for case 11,945 focused on individual theatre founders, the written case study itself reified the organisations, claiming that 'It is more vital than ever for Arts organisations to find new and innovative ways of working to ensure their own survival' (University 2022, 3). Many of journal papers underpinning the ICS templates also explicitly acknowledged the existence of different interests within organisations, for example through the use of labour process discourse. Impact case studies however consistently adopted unitarist frames of reference, presenting all interests in the organisation as the same, again resulting in wholly positive assessments of impact. In one instance, the very title of the written case study for 42,352- 'union-led learning services that widen educational access and benefit learners, unions and employers' (University of Strathclyde 2022, 1) implies through the collocation of 'learners, unions and employers' that all three groups share the same interests. Heavy reliance on evidence from organisations in the impact case studies also served to reify organisations, while intertextual references to organisations further reinforced the representationalist organisational perspective. Thus the section 'Sources to Corroborate the Impact' for case study 23,530 has three subsections: 'Accounts have been published in', 'Organisations which have provide factual statements', and 'Organisations that can be contacted to corroborate the claims' (University of Westminster 2022).

Finally, the journal papers were much more likely to recognise the politics and emotions underpinning pedagogical practices than the impact case studies derived from them. In line with the unitary frame of reference noted above, the ICS templates identified only beneficiaries of the impact. For example, the template for 22,392, as noted above, claimed that its mechanisms helped to deliver 'equal pay for all workers' (Keele University 2022, 3), although the underpinning research noted 'distributional concerns' in relation to how limited resources were shared out, and conflicts between increasing worker pay and improving organisational efficiency (Thornley 2007, 157). The written case for 42,353, as noted above, also did not identify any parties who did not benefit from the learning and development interventions, even though one of the underpinning journal papers explicitly noted that non-union members were excluded. While this underpinning research identified that not all benefited from the allocation of scarce resources, therefore, the ICS templates again ignored those who lost out in order to present only positive impacts of their research.

The greater attention paid by the journal papers to the politics and emotions underpinning HRD interventions was also evident in their challenging of the assumption of



HRD agency and expertise. Nine of the 12 journal papers presented the agency and expertise of those implementing HRD interventions as constrained, whereas only one of the written case studies identified any such limitation. One of the journal papers notes, for example, that

The extent to which policy makers, business incubator managers and others will take these issues seriously is dependent upon a number of factors, some of which are under their control, and some which are harder for them to influence

*(Thompson and Downing 2007, 542).*

In the ICS template 25,248 derived from this research, however, the contribution of the underpinning research is presented as highlighting ‘the significance of enablers in bringing about economic and social regeneration and [arguing] that policymakers should fully recognise the value of their contribution’ (University of Huddersfield 2022, 1), ignoring the constraints previously recognised. Given the desire to present the research as impactful, it is perhaps not surprising that the templates tended to downplay or ignore factors that might prevent effective implementation of the HRD interventions. Only in the impact case for 22,392 is there any recognition of the limitations of HRD agency, when it is noted that not all local authorities met the required deadline for implementation.

In summary, therefore, the written impact cases consistently adopted CHRD discourse less than the underpinning journal papers from which they were derived, and were particularly unlikely to challenge representationalist organisational perspectives and traditional pedagogical methods. There may be various explanations for this finding. In the first place, the political context of the REF put pressure on the writers of the case studies to demonstrate the greatest possible (positive) impact of their research. It is perhaps therefore hardly surprising that there was no acknowledgement of possible negative impacts, or of the limitations of their agency and expertise. The need to gather evidence perhaps also led the cases to focus on evidence from organisations, which might have been easier to obtain, thus encouraging reification of those organisations. Differences in the discourse adopted in the written cases compared to the underpinning research may also reflect different authors’ objectives. As noted above, there is no guarantee that the written cases were produced by the authors of the underpinning research. On the other hand, the greater use of CHRD discourse in the journal papers does not necessarily reflect greater an author’s academic freedom to adopt preferred discourse. Rather, it may reflect pressure to conform to a different political context in which critical discourse may be more likely to be rewarded with publication and so ‘accelerate prominence and promotion’ (Sambrook 2014, 157).

## Discussion

Our research questions 1 and 2 sought to identify how the political context of NPM influences discourse of HRD scholarship, and to what extent this discourse reflects the CHRD agenda. We have identified how new performance measurement, and associated methods used to communicate impact within REF 2014 Impact Case Studies (ICSs), has silenced CHRD research. This illustrates a potential decline in opportunities for communicating critical approaches to HRD, both in teaching and research, in other countries

adopting NPM in higher education and REF-type assessment exercises. We caution that this has implications for the development of critical HRD professionals to understand and challenge their political contexts, resulting in a focus on performativity at the expense of equitable, just, emancipatory, and sustainable organisational practices.

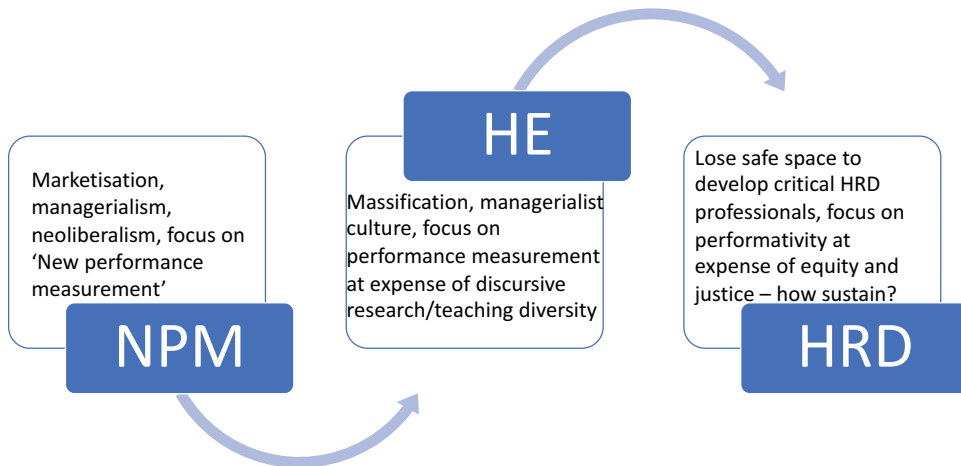
In illustrating and examining the different discourse of REF 2014 ICSs, and published research that underpins the ICSs, we have identified different mechanisms that illustrate a research ownership shift. The different audiences academics try to reach, for example through blogs or social media postings (Zou and Hyland 2019), partly accounts for this trend. This might itself be a reflection of university demands for researchers to increase public engagement with their research. In the case of REF 2014 however, the audience comprises reviewers from the research user communities, as well as academic peers. There is also a different purpose in that the beneficiaries of REF 2014 ICSs are individual universities rather than the individual academic who conducted the original research. This shift in research ownership, from the researcher to the university, is reflected in the use of other authors, including external consultants, to write the ICSs.

As well as general confirmation of varying use of discourse in different contexts, our findings also support previous research on the nature of discourse used in REF 2014 ICSs. Our findings indicate consistent use of the language of traditional HRD and absence of the CHRD discourse found in the underpinning research. We have identified that the focus of the ICS discourse in our sample is to 'sell' the impact (Watermeyer and Hedgecoe 2016). In privileging a discourse of traditional HRD rather than CHRD, the ICSs in our sample reflected the new style of writing identified by Reichard et al. (2020). This style is characterised by clear and direct writing that draws a simplified causality between the research and the impact, and a lack of expression of any uncertainty in the claims made in ICSs. Such a writing style is inconsistent with the writing to be found in CHRD research and so may help explain why discourse associated with the latter is lacking in ICSs.

Our third research question was designed to consider the implications of the different discourses for HRD and CHRD Research, pedagogy and practice. The invisibility of CHRD discourse in the ICSs we examined raises questions regarding the applicability and impact of CHRD understandings on practice. The impact case study format encourages and privileges accounts that present a performative discourse. In the longer term, the tendency to occlude tensions inherent to any learning and development intervention is misleading. We suggest there is therefore an intellectual dishonesty to the production of positive accounts of interventions, which may have a negative influence on future practice. If the impact case study format is designed to showcase the practical application of research, then we do practitioners a disservice in disguising the potential for negative outcomes linked to performative applications of critical research.

### **Implications for HRD theory**

We have developed the concept of new performance measurement to explain how NPM is shaping research evaluation in the UK HE system, and could similarly affect other research evaluation processes globally. This concept, alongside the identification of a research ownership shift, enables us to reveal how the socio-economic and political imperatives underpinning the REF favour accounts that strip away the complexities of



**Figure 2.** The impact of NPM on HE and possible future direction of (C)HRD.

the implementation of new initiatives, practices or policies, including in pedagogy. Figure 2 summarises the impact of NPM on HE and identifies the possible future direction of (C)HRD, leading to implications for HRD theory and practice.

### Implications for HRD practice

To address our final question regarding how we can sustain CHRd in HEIs in the context of NPM, we now propose alternatives to ICSs to counter potentially deleterious consequences of the (mis)application of CHRd research. First, we suggest that CHRd researchers create alternative formats to demonstrate how their research can inform practice. This might take the form of scholar-practitioner networks where CHRd researchers present their research to practitioners, and act as advisors or co-constructors of knowledge with practitioners. In addition, CHRd researchers might also discuss their work and its applicability to practice via social media platforms. CHRd researchers might, for example, learn from the methods of dissemination used by activist organisations who are seeking to influence public policy or organisation practices.

Examining ICSs informed by CHRd research poses difficult questions for CHRd researchers based in UK universities which, given the increasing use of national research assessments, may have relevance in other countries. Our study illustrates the difficulty of sustaining a CHRd discourse in an institutional environment that seeks to promote the practical application and positive impact of research. We do not suggest that CHRd should not engage with practice. However, it does sensitise us to dilemmas often faced by practitioners who might face resistance to initiatives that, for example, seek to encourage a more diverse workforce or rebalance gender inequalities in senior positions.

### Limitations and future research

Our small and purposive sample is consistent with previous similar and related research. Nevertheless, we recognise that it is not possible to generalise from such a sample to claim

that similar findings will be apparent in all Business and Management ICSs or in any other subject area. Future research could repeat the research in additional Business and Management ICSs and additional subject areas. However, we believe that these will not require large samples of ICSs to identify whether our findings here are isolated or indicative of a general trend. Moreover, given that ICSs may have been written without the involvement of the academics producing the underpinning research, future research might also survey those who wrote the ICSs to understand why they presented the impact as they did.

The approach of comparing and contrasting discourse in varying contexts could also be expanded in future research to identify further contradictions and tensions. One specific focus of this may be examination of how research is reported in academic and, separately, in professional journals. An additional focus could be between journals and related conference papers, both professional and academic conferences. Each of these have different audiences and purposes for sharing the research. For example, professional conferences and journals will have similar audiences and possibly similar purposes in creating or shaping impact.

## Conclusion

It is apparent from this research that the political context shapes discourse adopted by academics when reporting their research. We have shown that there are clear differences in the contexts of journal articles and REF 2014 ICSs. By identifying a shift from critical to performative discourse we have developed the concept of new performance measurement to explain how the NPM context is mobilised in practice. New performance measurement relies, in part, on a shift in research ownership from the individual researcher to the university. We suggest some alternative dissemination routes which CHRD scholars might use in their desire to engage with practitioners to promote more socially equitable and sustainable workplaces.

## Disclosure statement

No potential conflict of interest was reported by the authors.

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