

**Mind the Gap –  
A Comparative Analysis of (In-)Congruences in HRD Role Perception**

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### Abstract

Inspired by role conceptualisations and calls to rethink and reshape activities and competences of professionally qualified HRD practitioners, we examine HRD's role and its associated activities through established versions of role theory. We ask: To what extent is there congruence in role expectations of HRD practitioners and other stakeholders? We study this question by interviewing 71 HRD practitioners and non-HRD managers across 16 organisations in three countries (US/UK/NL) and by analysing their responses on HRD role expectations and perceptions, congruences and incongruences. We map our findings on a 2x2 matrix and find that only a small number of organisations see professional HRD practitioners as strategic partners; most organisations find themselves within a more operational HRD role definition, or somewhere 'on the fence', with mixed ideas of role perceptions. Yet, a few organisations struggle to find alignment on HRD's strategic aspirations and how those play out in practice. While our findings highlight the progress that HRD practice has made towards strategic partnership, we conclude that many HRD practitioners struggle to gain a seat at the table. We close our paper by discussing implications for HRD practice and scholarship. [187 out of 200 words]

*Keywords: HRD practitioners, role theory, role perception, (in-)congruences, business managers, strategic HRD*

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The concept of role has long been applied to analyse the purpose, activities, and required competences of HRD practitioners, especially in organisations settings: from the seminal work of McLagan (1989) to the more recent work of Garavan et al. (2020). It has been argued that since its early definition, the role of professional HRD practitioners has shifted, even before the Covid-19 pandemic and the changes it brought to the workplace (Authors, 2022; Author, 2022; Authors, 2020; Authors, 2019).

There have been numerous calls for reshaping both HRD research and practice (Bierema 2020; McGuire, Germain, and Reynolds 2020). What is the expected role of HRD practitioners, and is there an underlying gap between role enactment (what HRD is doing) and role perception (what HRD should be doing)? As Authors (2020) pointed out in their integrative literature review, the struggle to align HRD activities with organisational strategy and workforce needs has been well documented (Cappelli 2015; Catalanello and Redding 1989; Lawler and Boudreau 2015; Robinson and Robinson 1995) while the devolvement of certain people and developmental activities from the HR/HRD functions into business functions has been ongoing (Garavan et al. 2020; Gautam and Davis 2007; Watson, Maxwell, and Farquharson 2007; Zhu et al. 2008). The global health pandemic might not have caused those shifts, but certainly accelerated the need for transformation as organizations are re-thinking meeting modalities, flexible work arrangements and how to engage in social justice work (Hetrick et al. 2021; Sull, Sull, and Zweig 2022; Thapa 2022). What became transparent was the need for a coordinated effort within organisations,

involving all stakeholders, as well as a clearer role definition of the HR/HRD department and its stakeholders to execute their agenda of developing employees and managing organisational change. With that in mind, more research is needed to explore HRD roles and associated activities currently performed by HRD practitioners within organisations.

### **Purpose and Research Questions**

The purpose of this paper is to examine the role of professionally qualified HRD practitioners (also referred to as HRD practitioners from hereon) and their associated activities through established versions of role theory (Biddle 1986; Harnisch 2011; Hogg, Terry, and White 1995; Stryker 2001) and a discussion of role perception between HRD practitioners and what we refer to as non-HRD managers, across organisations and countries. Non-HRD managers means managers employed outside of the HR and/or HRD department or function. For the purposes of our study, we define these non-HRD managers as ‘organisation clients’ of professional HRD practitioners who act in their role as an internal *training and development consultant, learning consultant, and/or organizational change consultant* (see also Phillips and Shaw 1998). To achieve this purpose, we address the following two research questions:

**RQ1:** How are HRD roles perceived to be enacted by HRD practitioners and non-HRD managers?

**RQ2:** To what extent does this vary between organisations in the UK, the Netherlands, and the USA?

We seek to answer these questions by reviewing previous research and relevant writings on HR/HRD activities and positioning, viewed from a role theory perspective. We then juxtapose these frameworks and conceptualisations of HRD’s role with empirical findings from a transnational empirical study that investigates current role perceptions of HRD practitioners and

non-HRD managers across 16 organisations in three countries. Clusters of role perceptions are identified as part of the cross-case and cross-country comparison. This enables a description and explanation of the expected enactments of the two participant groups of HRD practitioners and their client managers, and the identification of needed changes in HRD roles. It also signals suggestions for future research and implications for HRD scholarship in the three countries (Authors, 2015; Author, 2015; Authors, 2015).

### **Role Theory & Conceptualisations**

According to the seminal work of Biddle (1986), which reviewed the then extant body of research and knowledge dating from the 1960's onwards, the notion of role and associated theories were originally developed within sociology and social psychology. This history allows a simple but important observation, which is that roles depend on interactions of more than one individual. In turn, this observation leads to a central question with varying perspectives providing varying answers; to what extent can and do individuals determine enactment of their roles? There are two broad answers to the question. The first argues that individual agency on the part of individuals determines how individuals act out their various roles, while the second argues that social structures independent of the individual determine how roles are enacted (Harnisch 2011). Both the question and the two broad answers can be seen in an analogy of a play performed on stage or in film. Critics are likely to find differences in the way Hamlet is portrayed on screen by Laurence Olivier – a British actor who dominated the stage of numerous classical plays in the mid-20th century, and by Mel Gibson – an American actor who is best known for his action hero roles. Each had to work within the constraints of the script as authored by William Shakespeare, but each could also bring their own interpretation of the character into

their performance. This analogy suggests that role enactment is a function of the interplay of structural constraints and individual agency (see also Graen 1969).

### *Three Perspectives*

The question just posed, and the answers suggested by the performance of actors in a drama are reflected in the three main theoretical perspectives in role theory.

#### *Structural Functionalism*

The first is based on structural functionalism (Stryker 2001). This perspective emphasises that the social system in which roles are enacted is the most significant determinant of role enactment. This arises because of the functions that are performed by roles in ensuring the operation and continuance of the system. Expectations and specifications of the role holders, e.g., professional HRD practitioners, constrain the contribution of any particular individual holding any particular role. Common features of organisations such as organisation charts, job descriptions, and competency specifications are examples of this perspective in practice. It needs to be noted however that variation in organisational contexts such as geographic location, economic sector, and size and history will affect role specifications. For example, it is unlikely that the role of say the Chief Learning Officer (CLO) will be precisely the same in a high-tech company in the USA as that in a long-established banking and finance company in Hong Kong.

#### *Symbolic Interactionism*

The second perspective, known as symbolic interactionism, is based primarily on the work of George Herbert Mead (Biddle 1986; Harnisch 2011). This perspective emphasizes the significance of individual agency rather than structural features in determining role enactment. Mead's analysis suggests that the idea of 'self' is both a social construct and is socially constructed. His argument is that the self consists of two elements which he labels the 'I' and the

'me'. The 'I' is the part of the personality concerned with spontaneous impulses, desires and wants which are to do with selfish gratification. The 'me' element of the personality monitors and, to an extent, censures the I by imagining and anticipating the consequences for and responses of other individuals. The 'me' element is developed by seeing one's behaviour from the point of view of others; in other words, by putting oneself in the place of others. Mead referred to this as 'role taking'. So, the 'me' element represents the internalised points of view of other people and constitutes an important part of individual personality. A key point that arises from this analysis is that enactment of roles by individuals is, as with structural functionalism, still constrained and so roles cannot be enacted completely as a particular individual may wish. However, in this perspective constraints are internal, exercised by the individual and based on perceptions of the expectations of others. Hence, we might say that HRD job descriptions and the like influence role enactment because they are a source of knowing the expectations of others.

### *Social Identity*

The third perspective is that of social identity. This perspective is strongly linked with symbolic interactionism (Hogg, Terry, and White 1995). However, there are key differences. The most significant is the introduction and use of the concept of social categories which also utilises the concept of 'in-groups' and 'out-groups.' Examples of these at a macro level include nationality, ethnicity, and political affiliation. At more micro, or local levels, are the categories of street gangs or favoured sports teams. Membership of social categories shape the attitudes, beliefs, and behaviour of individuals based on their perception of idealised prototypical member of the 'in-group' and exaggerated distinctiveness compared with 'out groups.' Within organisation contexts, social categories include different professions. For example, members of different professions such as HRD and Engineering may shape their behaviour to be congruent

with the prototype member of each profession which also sharply differs from the prototype of the other profession. Being at various levels in organisation hierarchies may also be perceived by some as, for them, an important social category, e.g., low level employees and senior managers. While symbolic interactionism argues that social structures are independent of the individual's enactment of roles, social identity theory allows for movement between categories and so alternative roles to be envisaged and aimed for, applying to both organisation functions and hierarchies.

### *Role Ambiguity, Conflict, and Incongruence*

The three role perspectives helped us to identify several potential problems when roles are enacted in organisations. As indicated by Giddens and Sutton (2021), the first challenge is *role ambiguity* which occurs when role holders, and others, are not clear about what is expected in performing their role. The second challenge is *role conflict* which occurs when there are contradictory differences in expectations between the role holder and others. The third potential problem is *role incongruence*. This occurs where there is some mismatch of the characteristics of the role holder and the expectations of others. An example of this might be young Chief Executives of start-up businesses who do not look or dress like stereotypical images or conform to the usual or expected behaviour of Chief Executives. Role incongruence also helpfully signals role congruence which is when characteristics of role holders and their expectations of enacting their role match with those of others in the organisation. Role congruence is a state to be aimed for in organisations in general, and for HRD practitioners more specifically.

### *HR/HRD Role Frameworks and Conceptualisations*

In Human Resources Management (HRM), the discussion on roles and positioning of HR managers has been emergent and ongoing. In his early 1990's model, Storey (1992) describes

four roles (regulators, handmaidens, advisors, and change makers) on two dimensions (interventionary – non-interventionary; tactical – strategic). It is clear from the role descriptions that ‘change makers’ depict the north star or most desired role in this setting. Ulrich (1997) offers a similar model that overlaps on one of the Storey dimensions (day-to-day/operational focus – future/strategic focus) but not on the other dimension of the four-box model where he suggests HRM to oscillate between processes and people orientation, leading to another set of potential HRM roles: Administrative expert, employee champion, change agent, and strategic partner.

Comparing these two models, the change agent/maker roles are most congruent, yet Ulrich (1997) introduces the idea of the strategic partner who works strategically and future-oriented on process improvements. While still being used in practice, the conceptualisations of HRM roles have evolved and more nuances have been added. For example, the HR practitioners can take on any of five roles, including strategic partner (Ulrich and Brockbank 2005) while they move from a more passive stance of ‘partners’ to an active stance of ‘players’ (Ulrich and Beatty 2001). In this more active stance, “HR’s focus must...be on scoring—on making things happen for customers—rather than merely being a part of the team” (Beatty and Schneier 1997, 29). What is clear from this discussion in the field of HRM is that the role of the HR professional is not about ‘being’ but rather it is about ‘becoming’ (Ulrich and Beatty 2001; Lee 2016) as HR practitioners adapt to the constantly changing landscape and contextual factors of the workplace.

The latter point on ‘becoming’ is argued by Lee (2016) to apply specifically to HRD. For Lee, the key dimensions in becoming are self and other, and structure and agency. As noted above, these dimensions are central to the determination and enactment of organisation roles. In addition, the discussion of roles and positioning of the HRD practitioner has also been evolving

over time (Gold et al. 2022). While in the early 1990's the HRD manager's role was described in more passive terms as someone who "supports and leads a group's work and links that work to the total organisation" (McLagan 1989, 48), its strategic positioning potential later became more apparent (Wognum and Lam 2000). A strategically integrated HRD function that is result-driven and measures organisational effectiveness of all their interventions while collaborating closely with managers and employee depicts the goal of HRD practitioners who are strategic in their approach (Gilley and Gilley 2014; Mitsakis 2019). The dichotomy of transactional-transformational work of HRD practitioners gets highlighted where transactional work means focusing on activity such as training delivery while transformational work focuses on a results-driven strategy that is performance centred (Gilley, Maycunich, and Quatro 2002). The transformational role allows HRD practitioners "the greatest opportunity for organisational impact and influence" (p. 25) through relationship building, influencing and strategic partnering (see also Mitsakis 2020). Hence, and in parallel to role evolution of the HR manager, the strategic partnership idea has also been socialized in HRD. In fact, Gilley and Gilley (2014) postulate six transformational roles of strategic professional HRD practitioners that include: Relationship builder (as a partnership role); organisational architect, strategist, and performance engineer (as professional roles); and change champion, and political architect (as leadership roles) for the HRD function. In a more recent study on professional HRD practitioners in organisations, the strategic partner role was found to be the least effective in organisations (Garavan et al. 2020). Most studies agree that context matters in this discussion, studies that have looked at contextual conditions that influence the effectiveness of HRD programmes and activities (Wognum 2001; Wognum and Mulder 1999) find that organisational culture is an

important condition for strategic HRD, as well as the availability of support by the CEO (Garavan et al. 2020).

### *2x2 Matrix of HRD Role Perceptions in Organisations*

Role enactment can be studied using different dimensions while including views of different stakeholders. Informed by role theory and existing HR/HRD role frameworks, we conceptualised a 2x2 matrix that depicts HRD role perceptions on an operational/transactional to strategic/transformational continuum on the one hand, and the perspectives of HRD practitioners (self-view) and non-HRD managers (manager-view) on the other hand (see Figure 1).

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INSERT FIGURE 1 ABOUT HERE  
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Using this 2x2 matrix, we can show congruence (i.e. when HRD self-view and manager-view align) and incongruence (i.e. when HRD self-view and manager-view diverge) in one graphical representation when comparing different organisations.

## **Methods**

Our study combined semi-structured interviews with inductive and comparative data analysis to review perceived role enactment of HRD practitioners and managers involved in organizing HRD activities in different organisations and geographies.

### ***Data Collection***

#### *Selection of Countries, Organisations and Study Participants*

A core group of researchers based in three different countries (US, UK, the Netherlands) formed at the Academy of HRD Conference in Louisville, KY where we presented our conceptual work on the HRD function – what it is doing and what it should be doing (Authors,

2020). All three countries offer degree programs in HRD, and HR/HRD practice in all three countries can be seen as mature. We decided to pursue this topic empirically, in a qualitative study, and pulled in further collaborators from each country. The aim was to find four to six organisations in each geography to participate in our study. Upon institutional review board (IRB) approval by our respective ethics committees, we reached out to organizations that met two criteria: 1) represented diverse sectors (private, public, and non-profit) to ensure maximum variation across the sample, and 2) included large and mid-market enterprises (more than 250 employees) with dedicated HRD practitioners to interview for the study.

### *Instrument and Semi-Structured Interviews*

Organisations were selected from our personal and professional networks where we employed snowball sampling within each organisation, starting with the HR/HRD interview partner and then asking them as part of the interview process to recommend other stakeholders in their organisation we could speak to. Using this approach, we aimed to create ‘balanced sets’ of interview partners between the HR/HRD and business functions. Each researcher took on the lead interviewer role for a set of three to six organisations in their country and conducted semi-structured interviews using an agreed upon interview guide that included customised sections for each of the stakeholders (HRD practitioners; non-HRD managers). The vast majority of interviews were conducted via Zoom and the interview guide included questions related to perceptions of the current roles of HRD, the interactions of HRD practitioners with non-HRD managers, the problems and challenges they encountered around HRD, and the future roles they would like to see for HRD.

### *Data Analysis*

#### *Data Analysis Approach*

We conducted qualitative data analyses using Atlas.ti (US) and MS Word/Excel (UK and NL). The different software used can be explained by the various license agreements in place at each of the researchers' universities. Interview transcripts were analysed inductively and deductively by the three research units (US/UK/NL) separately before engaging in a comparative analysis across countries. We each started with reading our transcripts several times to become "intimately familiar" (Eisenhardt 1989, 540) with each respondent within each organisation. Next, we each engaged in inductive analysis to derive key themes around role enactment and perceptions. Using deduction, we mapped each organisation on a 2x2 matrix to show congruence or incongruence in HRD role perception between HRD practitioners and non-HRD managers. Finally, we combined inductive and deductive analysis to look for contextual factors and situational constraints that informed patterns in our findings with a focus on cross-country meaning making.

### *Sample Description*

A total of 71 interviews, consisting of 36 HRD practitioners and 35 non-HRD managers in 16 organisations were conducted as part of this comparative study (see Table 1 for our sample overview).

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INSERT TABLE 1 ABOUT HERE

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Participating organisations can be described as established or 'traditional' although many went through mergers and acquisitions in the span of their existence. None of the organisations in this sample were Internet-based or start-up companies.

### *Trustworthiness*

Since the data was collected during slightly different periods for each of the geographies – US (January-April 2020); Netherlands (May-July 2020); UK (July 2020-November 2021) – the global health pandemic and its impact on HRD role perception was discussed to varying degrees. Beyond the timing of the study, all three country teams followed a rigorous study procedure with an aligned interview guide. During the interviews, the lead interviewers aimed at establishing trust with the interviewees by enabling video for those calls that were not conducted in person, showing them in their (home) office environment that mirrored the participants' office environment. Where appropriate, lead interviewers offered member checks to support fair representation and confirmability of interviewees' voices and feedback (Choi and Roulston 2015). In some instances, summary presentations and follow-up advice on content-specific challenges discussed were offered to participating organisations. These credibility-building measures make us confident in saying that the collected data represents authentic, rich, and meaningful lived experiences of professional HRD practitioners and non-HRD managers in those organisations included in our study (Anderson 2017).

## **Findings**

### ***Results of Addressing RQ1***

Our findings presented here start with a thematic analysis of role perception of HRD per stakeholder group (HRD practitioner self-view; non-HRD manager view), relating to our first research question:

**RQ1:** How are HRD roles perceived to be enacted by HRD practitioners and non-HRD managers?

*Self-View: How Do HRD Practitioners Enact their Role?*

HRD practitioners spoke at great length about their work portfolio when organizing activities in the learning and development (L&D) and related spaces. For this paper, we will focus on the role tensions and conflicts that they reported on when delivering value to their respective organisations. The next few paragraphs describe the role of the HRD function and the HRD practitioners within the function, from the perspective of the HRD practitioners themselves.

*Operational Drag: Workload, Lack of Resources and Low Engagement*

One tension in enacting HRD roles evolves around the workload where the client groups are often too large to handle for the L&D staff: “We have 1,400 employees and 6 coaches, so with this manpower you cannot train everyone” (NL1, HRD 3). Larger organisations tend to outsource part of their training delivery to external learning partners (US2, HRD 2) but smaller organisations do not have the resources to do that. Training in those smaller organisations is either provided in-house (US6, HRD 1) or it does not get offered at all (US3, HRD 2).

Administrative duties like taking minutes in meetings (UK2, HRD 2) and organizing conference rooms and training materials (US1, HRD 3) often put more operational burden on these HRD practitioners. In addition to the workload, employees and managers are not always open to the training offerings (NL1, HRD 3), which makes the task of coaches and trainers to develop their workforce even harder. Some HRD practitioners describe their work as very reactive and more like “order-takers” (US1 HRD 2) or “service providers” (NL4, HRD 1) where internal stakeholders come to them and say, “we want communication skills, or customer service skills or management training” (UK1, HRD 2) and the HRD function executes on these requests. While HRD practitioners realize that their organisations care about them engaging in different and more

developmental and transformational ways with their organisations (US3, HRD 1), more strategic initiatives often must take a backseat to accommodate other business priorities (NL4, HRD 1).

*Operational Complication: Multi-Faceted Nature of HRD Role*

HRD practitioners are asked to “wear numerous hats” (UK,4, HRD 1) and as a result “spin lots of plates” (UK5, HRD 1). A UK-based HRD practitioner mentions the role conflict between acting as a Board member and hence supporting the strategic direction of the business, and at the same time making sure the HR team delivers on the operating plan and the daily hustle (UK4, HRD 1). Another HRD practitioner describes the bartering and trade-offs that they face in their profession: “My [HRD practitioner] life is about bartering; 1 guinea pig is worth 2 hamsters” (UK5, HRD 2). Since the business requirements can change from month to month and sometimes even week to week – as experienced during the global health pandemic – HRD practitioners feel a tension between staying flexible and at the same time following through on their L&D plans: “We have to remain very flexible as an organisation...in what the needs are for the future (NL4, HRD 1). The sense of wearing many hats, coupled with limited (people and time) resources, HRD practitioners feel that they must “pick and choose” those activities that make the most impact (US1, HRD 2).

*Strategic Intent: Striving to Fulfil Business Needs*

At the same time, HRD practitioners also emphasize that they want to show their strategic value to get away from an order taker or service provider mentality. Aiming to transform their organisations through sustainable efforts that impact for their employees and organisations, a Dutch HRD practitioner states: “we’re very much into the long term and how we can leverage this...And how can we integrate this into our corporate culture, where continuous improvement is the driving force and that’s what it’s all about” (NL1, HRD 2). HRD

practitioners who strive for strategic contributions explained how they get together with their CEO or equivalent (UK1, HRD 1; US5, HRD 3) or their senior leadership team (NL3, HRD 1) to talk about strategic workforce management and any consequences that this would have for L&D and the leadership training function. ”n on’ of the higher education settings in the UK, the strategic alignment was seen not only as a development but also as a retention effort to “make sure that we’re mitigating against any risk of losing real talented people here at the university” (UK1, HRD 1). Needs analysis is key in this context as “everything starts with the need, right, the need comes from the business” (NL4, HRD 1). Senior HRD practitioners discuss their drive and recent accomplishments in relation to moving towards “proactively managing the situation” (US2, HRD 2). There is alignment of the importance to work towards people and business needs (UK4, HRD 1), with an understanding of the “big picture” (NL4, HRD 1) as their strategic “influence is growing” (UK6, HRD 2) even if the reality of it can be perceived as a struggle.

### ***Manager View: How Do Others See the Role of HRD?***

In our study, we interviewed both HRD practitioners as well as their business manager counterparts who work in various functions throughout those organisations. The next few paragraphs describe the role of the HRD function and the HRD practitioners within the function, from the perspective of the non-HRD managers.

#### ***Managers: Need HRD to Operationalize Training***

A UK-based business manager feels that “HRD is tremendously valuable” but that HRD does “not have the profile they should have. It should be seen to be much more important” (UK5, Mgr 1). According to another manager from the Netherlands, the HRD function is adding something to the strategy, but that their role is not necessarily to be strategic (NL2, Mgr 1). “HR and L&D should be on the front page much more, signalling the organisation is turning that way,

management, think about... these are suggestions” (NL3, Mgr 4). These comments suggest that HRD has sold itself as a strategic function but have not invested in the resources needed to cascade the strategy to operational levels.

Managers want more listening from their HRD counterparts (US3, Mgr 2) and they want the HRD function to produce more hands-on solutions (US4, Mgr 2). Some managers want to have a clear division of responsibilities: “It frustrates me when people think that HR should be the centre of attention. [They] are a support function...[they] are not here to run the business” (UK5, Mgr 1) while others strive to have frequent contact and regular discussions (NL4, Mgr 2) to create a shared understanding of what is important. In many instances, managers stress how they need the HRD function to operationalize their training needs and that they wished that the HRD function would “shout louder...promoting what they offer and what they can do – they do this but not enough” (UK6, Mgr 1). There is a constant risk that HRD is just seen as a nice to have, or as a “tinsel on the Christmas tree” (UK5, Mgr 1) – it is pretty but can be easily stripped away.

*Managers: Want Strategic Partnering, Collaboration, and Clarity*

As HRD seeks to partner with organisational functions when it comes to designing, delivering, and evaluating learning initiatives, managers recognize the partnership that HRD is seeking: “I think that now, more than ever, we have a great partnership with our Learning and Development team” (US4, Mgr 1). While collaborating closely and working “side-by-side” (US4, Mgr 2) or complementing each other (US2, Mgr 2), Managers ask their HRD counterparts to be more outspoken about what they bring to the table (UK6, MGR 1). A Dutch manager stresses the importance of a partnership with a “good cooperation between the people in the field and the people who are busy setting up the education and training” (NL3, Mgr 1).

A US-based manager explains why tight collaboration is important to them: “I love collaborating like with...the learning and development team. And I love making sure that we have significant impact on our community” (US4, Mgr 2). The manager adds that in their social services providing organisation they rely so much on the L&D team because they need to make sure that their staff is properly equipped with the skills to deliver the services to their diverse group of clients. Without a skilled workforce their operating model would fall apart (US4, Mgr 2). At times, HRD practitioners are seen as key drivers for strategic initiatives: “HR drove clarity on the Exec Board strategy” (UK4, Mgr 1).

In answering RQ1, we see a complicated picture of HRD role enactment of those who deliver HRD programs and activities, and the perception of their non-HRD business partners who have multiple HRD role expectations. Across organizations, HRD practitioners feel the operation drag of high workloads and lack of resources, coupled with low engagement of employees and management. This leads to operational complications where HRD practitioners wear many hats and engage in negotiations on what initiatives to priorities and how to get funding. While many HRD practitioners strive for strategic approaches to fulfil business needs, they feel a constant pull back into the operational needs of executing training and not having a seat at the table. Non-HRD business managers, on the other hand, rely on their HRD colleagues to execute and operationalize their functions’ training needs. This is their primary focus and expectation for many organizational stakeholders. Some managers are looking for strategic partnering beyond the “order taking,” in the form of collaborative, side-by-side engagement.

### ***Results of Addressing RQ2***

We continue with our cross-case and cross-country comparisons to address our second research question:

**RQ2:** To what extent does this vary between organisations in the UK, the Netherlands, and the USA?

Before comparing the 16 organisations based in three countries, we will highlight each of the country samples individually.

### *Country Profile – US*

The US sample comprised private and non-profit organisations from different industries, including medical devices, fast moving consumer goods, automotive manufacturing, social services, and heavy industry (see Table 2).

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All these organisations were “old” organisations, established more than a hundred years ago. The sizes varied; from medium size (US3, US5, US6) to large (US1, US2, US4). Three of the six organisations had a self-governing HRD function (US1, US2, US4) meaning that HRD was a stand-alone function rather than embedded in the HR department.

A couple of aspects stand out in the US sample. **US1** ran a large Corporate University that offers a variety of leadership courses for managers and executives at various levels. This organisation employs a “leaders-as-teachers” approach in training delivery where line managers were trained to be facilitators in leadership development, hence forming an integral part of the Corporate University’s strategic activities. **US2** was recently reorganised to centralise the HRD function into several Centres of Excellence (COE). With this centralisation, HRD leaders were trying to show their strategic value to the organisation, however, their business partner managers saw them more in operational functions, such as delivering training. In **US3**, the HR team was

responsible for recruiting and onboarding while business managers were responsible for functional training. There were few HRD activities available beyond these transactional processes, and the lack of leadership training, coaching and other developmental activities was mentioned throughout. **US4** represents a non-profit organisation that doubled in size within the last 10 years. As part of this growth strategy, a newly appointed CEO put L&D on the strategic agenda for the organisation, independent of the HR function. This new strategy manifested itself in the size of the HRD team, consisting of 15 instructional designers, L&D managers, and coaches who worked closely with the retail team on onboarding and training of new employees and supervisors as part of their strategic partnering function. **US5** did not have an HRD function per se, yet the organisational effectiveness (OE) team is integrated in the HR function and reports directly to the VP of HR. The OE team focused on change management and transformational approaches such as behavioural management techniques and continuous improvement initiatives. There was tension in the organisation as the OE team would have liked to be seen as more strategic but knew that they would not win the trust of their business stakeholders if they pushed too hard. **US6** is a branch of a large non-profit organisation that had no independent HRD department, and the Director of People Resources conducted most of the leadership training herself. With a large workforce in retail, the need for a more strategic approach was acknowledged and desired, but the lack of HRD-dedicated resources made it hard for the HR department to deliver those elements.

### ***Country Profile – UK***

The UK sample consisted of private and public organisations in higher education, rail services, national health services, and the leisure sectors (see Table 3).

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## INSERT TABLE 3 ABOUT HERE

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Many of these organisations went through mergers and acquisitions since their year of establishment. The number of employees in each of the organisations was more similar in size in comparison to the US sample; the employment base in the UK sample varied from 2,000-14,000 employees. Like the US, three of the six organisations in the UK sample had a self-governing HRD function (UK1, UK4, UK6).

The UK sample was unique in several ways. In **UK1**, the vice chancellor of this higher education institution championed HRD activities through staff induction, which was mandatory for all new starters. HRD responded proactively and strategically to employees' learning and development because of their access to senior management. From the HRD practitioners' point of view, internal stakeholders in **UK2** conducted learning needs assessments before implementing a new learning system. However, managers claimed that the HRD function in this organisation was drawn to more administrative duties like taking minutes in meetings. Some role conflicts and incongruences existed from the differing perceptions of HRD responsibilities, which impacted the organisation's ability to be strategic and transformational. As a healthcare provider, compulsory regulatory standards by the UK Care Quality Commission governed processes and practices in **UK3**. These standards informed the highly regulated and mandatory training that staff was required to undertake. While the unit manager and matron assigned all nursing staff their required training, the L&D team ensured that the required learning was achieved within the desired period. In **UK4**, a large company in the leisure sector, many examples of how HRD is driving the business strategy and working closely with the senior team

were shared. Here, the HR function consisted of HR Business Partners, L&D and Organisation Development (OD) professionals, and training was mostly carried out at an operational level. In contrast, **UK5** had separate HRM and HRD/OD departments. The HRD/OD leaders felt their strategic influence was growing, yet the managers mostly discussed the operational aspects of the HRD role e.g., training delivery. Finally, HRD/OD professionals in **UK6** discussed their increased involvement in more strategic, cultural, organisational change projects. While some managers acknowledged HRD's strategic involvement, it was not consistently seen throughout the interviewees.

### *Country Profile – NL*

While both the US and UK samples consisted of a mix in private and non-profit (US) or public (UK) organisations, all Dutch organisations were from the private sector, namely: travel, agriculture, financial and industrial services (see Table 4).

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INSERT TABLE 4 ABOUT HERE  
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The organisations' ages varied (from 1880s-1960s in terms of year of establishment), and so did their employment base (from 1,150 to 30,000 employees). Out of the four organisations sampled in the Netherlands, only one had a stand-alone HRD function (NL1).

The Dutch sample can be best described in terms of its dividedness in role perceptions. **NL1's** three HRD practitioners were divided over the issue of HRD's strategic value. While the L&D director was positive about its strategic direction, the two coaches painted a much more operational picture, to which the managers agreed. In **NL2**, a cooperative organisation, the HRD practitioners both emphasized their close contact with the business functions. The L&D advisor

was more hesitant about the strategic value of HRD than the Manager Talent Acquisition & Development; at the same time, the L&D advisor pointed to the business managers to take on a more strategic role themselves in HRD. Both managers had a negative view of the strategic value of HRD. The two HRD practitioners in **NL3**, a large bank, had distinct positions and stories about HRD. While the larger idea of HRD in this bank seemed to create strategic and transformational impact, a lot of what HRD did was best described as transactional and operational. Managers agreed that the strategic framework was there, but its execution left a lot to be desired, occasionally causing some role conflict. In **NL4**, the two HRD practitioners in this international industrial services provider both talked about their operational roles. Strategic ideas were mentioned, but their execution was missing. In this organisation, the managers had little contact with HRD people and were not aware of what HRD do. Managers stated that they would appreciate a more proactive role from HRD.

***Cross-Case Comparison: (In)congruences in HRD role perception***

As a next step, and in line with our research interest around role ambiguity, conflict, and incongruence, we analysed each organisation in terms of HRD role perception and mapped them on the 2x2 matrix for a cross-case and cross-country comparison (see Figure 2).

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INSERT FIGURE 2 ABOUT HERE  
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The unit of analysis for our cross-case comparison were the 16 organisations included in this paper's analysis. In Figure 2, we notice congruence in some organisations, and incongruence

in others. Those organisations that had an independent, stand-alone HRD function were indicated with a tick.

We find the following five clusters that we each describe briefly before offering some interpretation of the patterns that emerged:

1. **Congruence: Agreement on Strategic Partnering Role** – We found four organisations (US1; UK1; US4; UK4) with congruence on the perceived strategic role for HRD, where all organisational stakeholders – whether HRD or from other business functions – see the strategic approaches of the HRD function. This cluster included two US (US1 and US4) and two UK-based organisations (UK1 and UK 4). We noticed that organisational stakeholders in this grouping enjoy their strategic partnership, and HRD practitioners experience their role as transformational and outcome-based with many ideas for future innovations in L&D and related functions. All organisations in this quadrant had an established HRD function that was independent from the HR function (see tick as indicator for HRD independence in Figure 2).
2. **Congruence: Agreement on Operational Execution Role** – Another set of four organisations found agreement on HRD holding an operational role. This includes two organisations from the Netherlands (NL1 and NL4) and one each from the UK (UK3) and US (US3). A common focus in this cluster was the delivery of training, and the operational excellence that was performed by the HR(D) function in doing so. Business partners acknowledged and appreciated the operational role focus.
3. **Incongruence: HRD Aspires to Be Strategic, but Managers Do Not See That** – There was some degree of incongruence between HRD practitioners and managers in

each country and across sectors in each country. In our data set, we found three organisations (US2; UK5; UK2) with incongruence on role perceptions: what HRD desired to be vs. how they were seen by the non-HRD business managers. We observe that organisations in this grouping experience a lot of role conflicts and dissatisfaction for those working in the HRD function because of the incongruence in role perception. HRD aspired to be strategic, but managers do not see that.

#### 4. **On the Fence: HRD Caught In Between Operational and Strategic Role**

**Perception** –The biggest cluster of organisations across the three countries (US5; NL3; US6; NL2; UK6) were “on the fence”. These organizational stakeholders had a challenging time determining HRD’s role positioning and often found themselves between congruence and incongruence regarding HRD’s self-view on whether they see themselves as operational or strategic. Overall, professional HRD practitioners continued to aspire to a more strategic role even if caught between these dimensions.

5. **Empty quadrant:** While the 2x2 matrix in Figure 2 has four quadrants, no organisation was found to be mapped in the top left corner where managers saw the HRD role to be strategic and HRD’s self-view was different from that.

Although there is a demonstrable lean towards congruence in both the operational and strategic dimensions (Cluster 1. and 2.), about a third of the respondent organizations are “on the fence” (Cluster 4.). In 1., we notice that all organizations have a dedicated HRD function, with three out of the four organisations representing private sector organisation with total employment above the average for the sample.

### *Cross-Country Comparison*

As a last step in our analysis, we reviewed the four clusters and attempted to make sense of these emerging patterns when comparing organisations from each of the three countries. What stood out to us was the more apparent similarities between US and UK organizations where in each country case the organisations are more spread out across the grid. In addition, we noticed that the UK had more organisations in the “strategic” self-view half (right hand side of the grid) in comparison to the US, and certainly relative to the Netherlands. The Dutch organizations cluster more closely together, with less spread, and more presence on the “operational” self-view half (left hand side of the grid). As the sample size with four to six organisations per country is small, these findings are far from generalizable results. We will attempt, nevertheless, to share our assumption and attempts of sense-making of the emerging country patterns.

The fact that the US and the UK have more organisations with Independent HRD functions could be attributed to the fact that the HR frameworks in the countries (as compared to the Netherlands) are more mature and more developed. Educational systems, such as the availability of professional certifications through higher education and industry accreditation bodies (such as ATD or SHRM in the US and CIPD in the UK) could contribute to more developed models of HRD. The US and the UK are more similar in terms of their Anglo-Saxon business models and regulatory environments. Moreover, they share a common language which means that knowledge and evidence-based approaches might travel more easily between the US and the UK. While all Dutch professionals are very fluent in English (which would void the argument just brought forward), the fact that the Netherlands employs a more Rhineland business model (Avery and Bergsteiner 2013) might add to the difference. The Rhineland business model can be best explained as we compare it to the Anglo-American business model, which resonates with a cultural emphasis on individualism as opposed to collectivism and emphasises shareholder

value as the key purpose of businesses and measure of success. In contrast, the Rhineland model, influenced by cultural valuing of collectivism, emphasises a wider group of stakeholders, for example employees and government as representative of citizens, having legitimate interests in the operation of businesses and their success. Also, the Netherlands with 17.5 million inhabitants is a much smaller population in comparison to the US (331 million) and the UK (67 million). All these factors could contribute to the differences in spread observed in our cross-country comparison.

### **Discussion**

Our findings highlight the progress that some HRD practitioners have made towards being seen as a strategic influence, especially in those organisations where there is congruence of HRD's self-view and the view of non-HRD managers in their organisation. This was manifested in their strategic 'seat at the table' in relation to information sharing – a position that was, and in many organisations still is, limited to non-HRD managers. However, in those few organisations who engaged in strategic partnering, HRD practitioners are leading – with individual agency (Biddle 1986; Harnisch 2011) – higher level projects that feed into the wider strategy where the 'seat at the table' is now more readily available. The readiness for strategic partnering suggests a positive development in the right direction, even if this is not yet the reality for many organisations where the HRD function is seen by both – HRD themselves and managers – as mostly operational. These organisations that see HRD's role as mostly operational could be limited by structural constraints (Stryker 2001), either being a smaller organisation, lacking resources or CEO support, or being in an industry where operational excellence is valued over strategic partnering. For all those other organisations there is still more work to be done in this regard and still more movement expected.

Our findings also show that there might be a misunderstanding for many organisations with HRD role incongruence; in these organisations, HRD aspires to be more strategic while representatives of the business see the HRD function as mostly operational (Hirudayaraj and Baker 2018). The misunderstanding is likely to be related to the debates and uncertainty of the meaning of HRD within both academic and practitioner communities (Gold et al. 2022). This finding also suggests that role enactment and perspective depend on which role you are in. It seems that while HRD are striving to build and maintain their strategic presence, some non-HRD managers value this strategic input, as they are making space for HRD to develop that role further, moving towards a strategic business partner role (Mitsakis 2019). Yet other managers do not directly recognize the value of HRD's strategic aspirations, as these other non-HRD managers are expecting more hands-on support, leading to a potential role conflict (Giddens and Sutton 2021). For those organisations where there is no alignment in role perspectives but incongruence in views, there is limited progress (and structural constraints) in gaining a seat at the table that would make Influencing or managing organisation strategy possible.

An additional factor of interest is the independence of the HRD function from a wider HR department. In those organisations with a separate and independent HRD function, indicated by a tick in Figure 2, only one falls in an operational quadrant. The rest of those organisations fall in a strategic quadrant. The most desirable quadrant of strategic congruence is populated by only organisations with an independent HRD function. While our data is limited and there may be other influencing factors, our data does suggest that being part of a generalist HR function might be detrimental to achieving both a strategic role and role congruence for professional HRD practitioners.

### *Implications for HRD Practice and Scholarship*

Key authors have argued the strategic importance and strategic nature of the HRD role for some time now (Author, 2001; Gold et al. 2022). In our study we showed that HRD practitioners in all three countries (US/UK/NL) are striving to be more strategic, however, how they can drive organisational effectiveness and enhance sustainable organisational success has not been sufficiently explored. As a starting point, HRD practitioners should strive to understand organisation needs and assess necessary resources (people, skills) to determine how to deliver effective change and learning initiatives within their organisations. Whilst a proactive response to externalities implies that the organisation is strategic, the nature of the organisation and its offerings can determine appropriate responsiveness. We note that organisations – in their country and industry contexts – are subject to varying degrees of regulation that influence what they do and how they do it, which can impact the response to training, e.g., the UK NHS organisation is governed by a tight regulatory framework. The nature of the organisation means that some elements of the business might not be considered proactive and thus not strategic. Nonetheless, the fundamental role of HRD practitioners, irrespective of the nature of the business, is to support non-HRD managers in creating an effective learning environment/culture through HRD-related services and HRD-specialised expertise.

So, what should HRD practitioners be doing differently or better to maximize their contribution to organizational effectiveness at the strategic as well as operational levels? Our study shows that a long-term orientation of HRD interventions, coupled with a clear pathway on how to get from A to B, delivered by an HRD practitioner with strong subject matter expertise is a good starting point. For that expertise to be effective, the HRD practitioner should spend ample time with their non-HRD managers and business partners to customize their interventions. The major challenge for HRD practitioners in the field remains how best to persuade managers to

treat them as strategic partners. To this end, we suggest HRD, even if struggling with resource constraints, need to be more proactive in identifying the organisational problems of greatest concern to managers at every level of the organisation (see also Mitsakis 2021). HRD need to take the lead on pointing those problematic factors that negatively impede most on managerial and organisational performance and success, by engaging in organisational analysis and by being able to point out weaknesses that may impede organisational effectiveness and performance (Hamlin and Russ-Eft 2019). This means ‘selling’ their credentials as internal training consultants, learning and development consultants, and organizational change consultants who can conduct in-depth analyses to explore and better understand the problems. By doing so, HRD practitioners can provide managers with bodies of ‘best evidence’ that can be used to formulate and implement appropriate HRD initiatives that resolve the problems and bring about the desired improvements (Gubbins et al. 2018).

HRD practitioners also need to better manage expectations and perceptions on where they can add value by shaping managers’ perceptions of what a partnership in organizing HRD activities could look like. In our US data, we have seen partnership examples around delivering leadership development through the corporate university together (US1) while in one of our UK organisations, an HRD practitioner was on the Board of their organisation working closely with the Executive team on setting the people strategy (UK4). In some areas of HRD, especially in Career Development, it is already acknowledged that line managers take on more active roles in career planning and development of their employees (Authors, *forthcoming*; Authors, 2022). That way, managers can play an active role rather than being disappointed that they are not getting from their HRD partners what they were hoping for.

HRD scholars can also contribute positively towards the role expectations and perceptions of the HRD function. For example, HRD scholars and those who teach at business schools can ensure that line managers who study for MBAs fully understand the significance of investing in appropriate HRD effort when implementing learning initiatives or managing change (Mintzberg 2004). Currently, we find that insufficient emphasis is given to the ‘soft’ people issues of organisational change, and that scholars in other management-related disciplines teaching on MBA programmes tend to undervalue the critical contribution of HRD practitioners (Swart, Chisholm, and Brown 2015). HRD scholars can also help CEOs and other top managers who are attending executive development programmes to recognize the need to develop in-depth understanding of what is going on deep inside their organisations, particularly the cultural factors that cause things either to happen or not to happen. Additionally, helping them to fully appreciate the role that HRD practitioners can play in identifying and diagnosing such organisational impediments, and the value of HRD practitioners acting as partners of managers at all levels in designing and implementing organisation strategy. HRD scholars can, and should, play an active role in pointing out and closing the gap in HRD role perception.

### ***Research Limitations***

We acknowledge three limitations in this study. As the data collection was conducted during the global health pandemic, most interviews were conducted virtually rather than in-person. That meant that we missed interacting with respondents in their natural environment that would potentially have given us additional information on their role perception. While this could be perceived as a missed opportunity, we do believe that interviewing HRD practitioners and non-HRD managers virtually was also an enabler as we did get access to many more people

because of the relative ease of interviewing. Also, recording and transcribing virtual interviews was facilitated by available software.

A second limitation can be found In the number, type, and geographic location of organisations we accessed for this study. We had planned to include organisations from all three sectors: private (for-profit), public sector, and third sector (non-profit), but soon had to realize that access negotiations were much more difficult than anticipated, especially for public organisations during the Covid-19 pandemic. We therefore decided to go with our convenience sample of the organisations that we could activate through personal and professional networks, which helped us to complete the study. We also recognize that our study included only Western organisations and their stakeholders, which means that the findings may not be relevant and/or transferable to non-Western countries.

Third, we realise that HRD needs during challenging times are influenced by those difficulties (Mitsakis 2021). In the case of the pandemic, furloughs and cost-cutting might have been different than during ‘normal,’ non-Covid 19 times. It could well be that non-HRD managers were looking for hands-on operational support more readily to cope with the urgent changes, and that they were not necessarily thinking longer-term about more strategic initiatives connected to the HRD function.

### ***Future Research***

We believe that this study offers a solid foundation for adding more data points, either by approaching additional organisations in all three countries and using the same interview guide, or by adding other countries in non-Western geographies (e.g., India, Korea, or China) to the study. Other studies have already expanded their horizon on researching strategic HRD in Asia-Pacific (Sthapit 2020) and the Global South (Nuni and Kebe 2020).

We attempted to bring into our discussion contextual underpinnings that could explain some of the HRD role perceptions, highlighting some structural constraints as well as some supporting factors. As part of a future study, we could add more focus on internal and external factors that influence the way that HRD is positioned and perceived as suggested by Mitsakis' (2019) model of strategic HRD. These could include links to virtual HRD (Rahimi et al. 2021; Thite 2022), flexible work (Bontrager, Clinton, and Tyner 2021), and dynamics that can be observed in organisations of the gig economy where the average workforce tends to be younger (Yerby and Page Tickell 2020). In addition, we believe the influence of structural location of professional HRD practitioners in a general HR department or an independent HRD function is worthy of further investigation.

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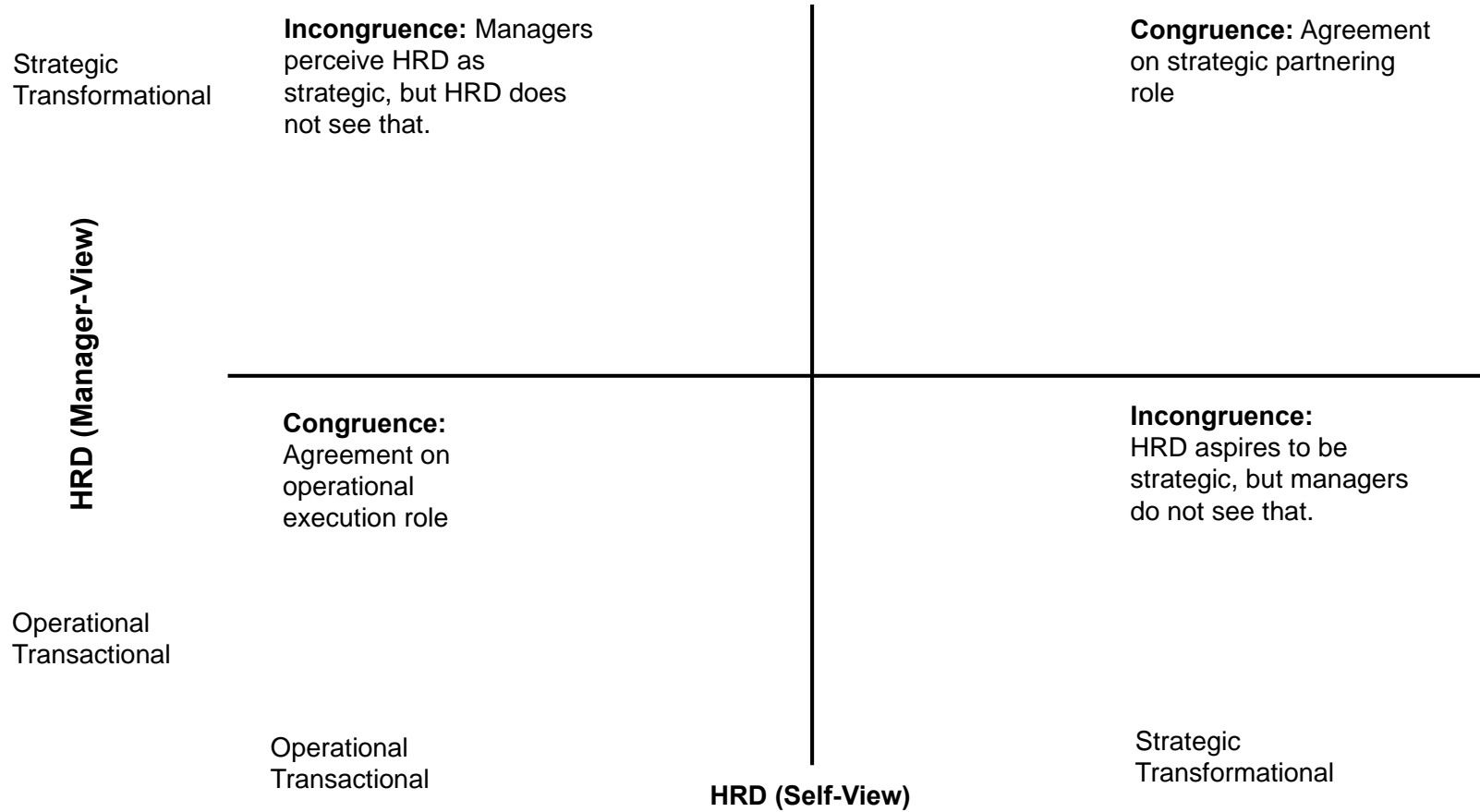


Figure 1. 2x2 Matrix of HRD role perceptions (self-view / manager-view)

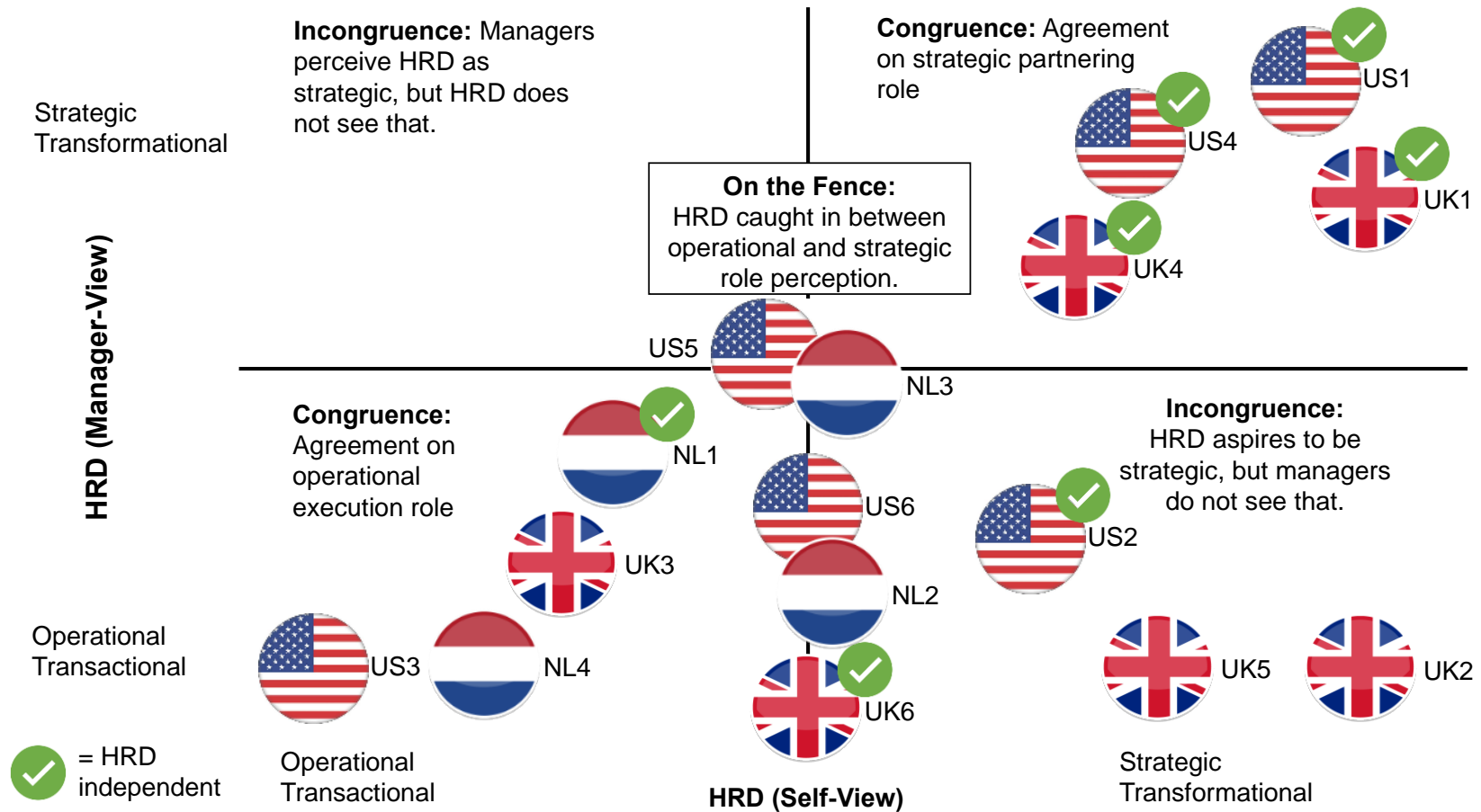


Figure 2. (In)congruences in HRD role perceptions

Table 1.

*Sample overview*

Country (# organisations)	HRD	Manager	Total
USA (6)	14	14	28
UK (6)	13	11	24
The Netherlands (4)	9	10	19
Total (16)	36	35	71

Table 2.  
*Descriptive information of organisations by country – US*

<b>Context</b>	<b>Organisation (By industry)</b>	<b>Abbr.</b>	<b>Public, Private or Non-Profit</b>	<b>Year of establishment</b>	<b>Number of employees</b>	<b>Self-governing HRD function** (√ - Yes, or X - No)</b>
<i>US</i>	Medical Devices	US1	Private	1890s	65,000	√
	Fast Moving Consumer Goods	US2	Private	1880s	15,000	√
	Automotive Manufacturing	US3	Private	1920s	500	X
	Social Services 1	US4	Non-Profit	1900s	4,000	√
	Heavy Industry	US5	Private	1800s	310	X
	Social Services 2	US6	Non-Profit	1900s	650	X

\*\*The self-governing HRD function describes whether HRD is a stand-alone function or embedded into the broader HR department.

Table 3.

*Descriptive information of organisations by country - UK*

<b>Context</b>	<b>Organisation (By industry)</b>	<b>Abbr.</b>	<b>Public, Private or Non-Profit</b>	<b>Year of establishment*</b>	<b>Number of employees</b>	<b>Self-governing HRD function** (√ - Yes, or X - No)</b>
<i>UK</i>	Higher Education 1	UK1	Public	1840s	2,000	√
	Rail Services	UK2	Private	1860s/2010s	2,500	X
	National Health Service 1	UK3	Public	1900s/1990s	5,000	X
	Leisure	UK4	Private	1890s	14,000	√
	Higher Education 2	UK5	Public	1820s	2,000	X
	National Health Service 2	UK6	Public	1990s	6,000	√

\*Many of these organisations went through mergers & acquisitions. In some of the UK cases we captured all these changes.

\*\*The self-governing HRD function describes whether HRD is a stand-alone function or embedded into the broader HR department.

Table 4.  
*Descriptive information of organisations by country - Netherlands*

<b>Context</b>	<b>Organisation (By industry)</b>	<b>Abbr.</b>	<b>Public, Private or Non-Profit</b>	<b>Year of establishment</b>	<b>Number of employees</b>	<b>Self-governing HRD function** (√ - Yes, or X - No)</b>
<i>Netherlands</i>	Travel	NL1	Private	1960s	1,150	√
	Agriculture	NL2	Private	1890s	3,000	X
	Financial	NL3	Private	1820s	20,000	X
	Industrial Services	NL4	Private	1880s	30,000 / 1,150 in NL	X

\*\*The self-governing HRD function describes whether HRD is a stand-alone function or embedded into the broader HR department.

Appendix 1. *For review only (not for publication)***Interview Protocol****Administration**

The researcher will first establish rapport with the participant and then explain the informed consent prior to starting the recording / asking questions in the semi-structured interview setting. Time will be allowed to ask questions by the participant about the research and data collection procedure. The researcher will show appreciation for the participant's time and input into the study. The follow-up questions are planned in case the participant needs further probing and prompting with a response.

***Informed consent script before interview:***

Thank you for volunteering to participate in this study. As the informed consent form states, the study will be audio recorded and transcribed by Rev.com, a professional transcription service company.

The original recording along with the transcribed document will be stored in a secure location to protect your confidentiality. I will send a summary of the transcription to you to your input and feedback. You may make corrections, edits, additions, and deletions.

As a reminder, the purpose of this study is to inquire about the role of HRD and its professional practitioners in their current environment – what it is, and what it should be going forward. We hope to learn about your personal experience with and individual perspective on this question.

If at any point during this interview, or after we finished our chat, you change your mind about participating, just let me know. You can stop the interview at any point in time.

Do you have any questions about the consent form or your rights as a participant in this study before we begin?

**Interview Guide - For Non-HRD Managers*****1. Needs of Business Leaders (What)***

1a. Tell me your role, and how you interact with people in the HR/HRD function, in particular around topics of learning and development. What services do you expect from HRD?

*Follow up: Restate one of the HRD services identified by the respondent. Then ask: How does HRD provide this service?*

*Follow up: What other needs do you have in talent management, organization development, coaching etc?*

1b. How is that similar or different from other work experiences you have had in previous roles and/or organizations?

1c. What is most valuable, beneficial to the organization about HRD? And why?

*2. Diffusion and Integration (Who)*

2a. What role do you play yourself in the provision of these HRD services?

*Follow-up: Can you give me an example...?*

*Follow-up: [if managers are engaged in provision of HRD services] How did you get into this...?*

2b. Who else is involved in the provision of HRD services?

2c. What do you believe HRD should be providing for the organization, but is not?

*3. Execution of HRD services (How)*

*3a. First-hand Knowledge of the Work Itself*

To what degree are HRD practitioners involved in, and knowledgeable about, operational / production / business activities that are core to the organization?

*Follow-up: Can you give me an example...?*

*3b. Strategic Alignment of HRD in the Organization*

To what degree does the HRD function contribute directly to the strategic business growth and development of the organization?

*Follow-up: Can you give me an example...?*

*3c. Demonstrate Effectiveness, ROI, use Data-driven Decision-making*

To what degree does the HRD function demonstrate its effectiveness, return-on-investment?

*Follow-up: Can you give me an example...?*

*3d. Other challenges*

What other challenges do you see in the execution of HRD services?

*4. Future outlook*

4a. Given everything we discussed, what are your hopes going forward?

*Follow-up: Is there anything else you would like to add before we close today's interview?*

### **Interview Guide - For HRD / HRM Professionals**

#### *1. Needs of HRD (What)*

1a. Tell me about your role, and how you interact with people in your organization. What does your organization need when it comes to HRD services, in particular around topic of learning and development?

*Follow-up: What are other needs that they have in talent management, organization development, coaching etc?*

1b. How do you see the current organizational needs fulfilled by the HRD function?

1c. What other needs around HRD services does the organization have?

1d. How are those needs similar or different from other work experiences you have had in previous roles and/or organizations?

#### *2. Diffusion and Integration (Who)*

2a. What role do you play in the provision of these HRD services? What role do your business partners play?

*Follow-up: Can you give me an example...?*

2b. What expectations are there towards you to engage in the provision of these HRD services?

2c. Who else is involved in the provision of HRD services?

#### *3. Execution of HRD services (How)*

##### *3a. First-hand Knowledge of the Work Itself*

To what degree do you feel that you are involved in, and knowledgeable about, operational / production / business activities that are core to the organization?

How do you keep up with first-hand knowledge acquisition?

*Follow-up: Can you give me an example...?*

##### *3b. Strategic Alignment of L&D in the Organization*

To what degree do you contribute directly to the strategic business growth and development of the organization?

*Follow-up: Can you give me an example...?*

*3c. Demonstrate Effectiveness, ROI, use Data-driven Decision-making*

To what degree do you demonstrate the L&D function's effectiveness, return-on-investment back to the business?

*Follow-up: Can you give me an example...?*

*4. Availability of Resources (Support) – only for HRD professionals*

4a. What are the resources available within your organization to deliver those L&D services?

4b. How can the relationship with external professional organizations, e.g. [AHRD/ATD] (or equivalent country organizations) help bridge the gap?

*5. Future outlook*

5a. Given everything we discussed, what are your hopes going forward?

*Follow-up: Is there anything else you would like to add before we close today's interview?*

Appendix 2. *For review only (not for publication)**Data Collection Overview*

<b>Reference</b>	<b>Job Title</b>	<b>Department</b>	<b>Professional HR/HRD background</b>	<b>Gender</b>	<b>Ethnicity</b>
US1, HRD 1	Sr. Director, Learning & Development (L&D)	HRD	√	F	White
US1, HRD 2	Sr. Manager, L&D, Talent Management	HRD	x	F	White
US1, HRD 3	Assoc. Director, L&D	HRD	x	F	White
US1, Mgr 1	VP, Research Center Ireland	R&D	x	M	White
US1, Mgr 2	Sr. Director Program Management	R&D	x	M	White
US1, Mgr 3	VP, Finance	Finance	x	F	Asian
US2, HRD 1	VP, Inclusion & Diversity, and Talent	HRD	√	M	White
US2, HRD 2	Director, Global L&D	HRD	√	M	Asian
US2, Mgr 1	Sr. Director, Global Customer Marketing	Marketing	x	M	White
US2, Mgr 2	Principal Engineer and L&D Leader	Business	x	M	White
US3, HRD 1	HR Manager, Business Partner (HRBP)	HR	√	F	White
US3, HRD 2	Sr. Talent Acquisition Specialist, HRBP	HR	√	F	White
US3, Mgr 1	Product Development Trainer	Operations	x	M	White
US3, Mgr 2	System Engineering Manager	Engineering	x	M	White
US4, HRD 1	VP, L&D	HRD	√	M	White
US4, HRD 2	Director, L&D	HRD	√	M	Native American
US4, Mgr 1	Area Manager, Training Stores	Business	x	M	White
US4, Mgr 2	VP, Mission Services	Business	x	F	White
US5, HRD 1	HR, Organisation Effectiveness (OE)	HRD	x	M	White
US5, HRD 2	Behavior Management Leader, OE	HRD	x	M	White
US5, HRD 3	VP, HR	HRD	√	M	White
US5, Mgr 1	Spare Operator, Lead and Trainer	Operations	x	M	White
US5, Mgr 2	Superintendent	Operations	x	M	White
US5, Mgr 3	Quality Manager	Quality	√	F	White

Reference	Job Title	Department	Professional HR/HRD background	Gender	Ethnicity
US6, HRD 1	Director of People Resources	HR	√	F	White
US6, HRD 2	Employee Engagement Manager	HR	√	F	White
US6, Mgr 1	Contact Center Operations Manager	Business	x	F	White
US6, Mgr 2	Store Team Leader	Business	x	M	White
UK1, HRD 1	Learning and Organisational Development (OD) Manager	L&D	√	F	White
UK1, HRD 2	L&D Lead	L&D	√	F	White
UK1, HRD 3	OD Consultant	L&D	√	F	White
UK1, HRD 4	L&D Program Coordinator	L&D	√	F	Asian
UK2, HRD 1	Human Resource Director	HR	√	F	White
UK2, HRD 2	Senior HRBP	HR	√	F	Asian
UK2, HRD 3	Senior L&D Manager	L&D	√	F	White
UK2, Mgr 1	Customer Experience Staff	Business	√	F	Mixed
UK3, Mgr 1	Sister at Intensive Care Unit (ICU)	ICU	x	F	Black African
UK3, Mgr 2	Sister	ICU	x	F	Black Caribbean
UK3, Mgr 3	Sister	ICU	x	F	Black Caribbean
UK3, Mgr 4	Research Nurse	Research	x	F	Black Caribbean
UK4, HRD 1	HR Director	HR	√	M	White
UK4, HRD 2	L&D Manager	L&D	√	M	White
UK4, Mgr 1	Company Secretary	Business	x	F	White
UK4, Mgr 2	Head of Operations	Business	x	M	White
UK5, HRD 1	Associate Director, OD	HRD	√	F	White
UK5, HRD 2	Head of OD	HRD	√	M	White
UK5, Mgr 1	Head of Department	Business	√	F	White
UK5, Mgr 1	Head of Department	Business	x	F	White
UK6, HRD 1	Head of OD	HRD	√	M	White
UK6, HRD 2	OD Practitioner	HRD	√	F	White

Reference	Job Title	Department	Professional HR/HRD background	Gender	Ethnicity
UK6, Mgr 1	Lead Pharmacy Technician, Education & Training	Pharmacy	x	F	Asian
UK6, Mgr 2	Deputy Director of Strategy and Planning	Business	x	F	White
NL1, HRD 1	Retail Manager Sales	HRD	x	F	Unknown
NL1, HRD 2	Coach	HRD	x	F	Unknown
NL1, HRD 3	Coach	HRD	x	F	Unknown
NL1, Mgr 1	Financial Manager	Business	x	M	Unknown
NL1, Mgr 2	Store Manager	Business	x	F	Unknown
NL2, HRD 1	Manager Talent Acquisition & Development	HRD	√	F	Unknown
NL2, HRD 2	L&D Advisor	HRD	√	F	Unknown
NL2, Mgr 1	Team Leader Maintenance & Engineering	Business	x	M	Unknown
NL2, Mgr 2	Customer Service Manager & Fulfilment	Business	x	M	Unknown
NL3, HRD 1	Global Lead Learning Innovation & Development	HRD	x	M	Unknown
NL3 HRD 2	L&D Consultant	HRD	x	M	Unknown
NL3, Mgr 1	Industry Manager/Director Manufacturing	Business	x	M	Unknown
NL3, Mgr 2	Head of Strategy & Performance	Business	x	M	Unknown
NL3 Mgr 3	Director Private Banking	Business	x	F	Unknown
NL3, Mgr 4	Director of SME Banking	Business	x	M	Unknown
NL4, HRD 1	HR Manager	HR	√	M	Unknown
NL4, HRD 2	Education Coordinator	L&D	x	M	Unknown
NL4, Mgr 1	Finance Director	Finance	x	M	Unknown
NL4, Mgr 2	Head of Project Administration	Business	x	M	Unknown