

DISSERTATION

IS IT WORTH IT? - A PHENOMENOLOGICAL ANALYSIS OF THE WILLINGNESS TO
TAKE INTERPERSONAL RISK

Submitted by

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In partial fulfillment of the requirements

For the Degree of Doctor of Philosophy

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Fort Collins, Colorado

Spring 2025

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ABSTRACT

IS IT WORTH IT? - A PHENOMENOLOGICAL ANALYSIS OF THE WILLINGNESS TO TAKE INTERPERSONAL RISK

Developing and implementing new technologies are essential parts of our economic system. Organizations aim to improve career information technology (IT) project success and reduce costs. Late-stage career professionals are valuable assets for organizations to leverage in delivering these projects and capabilities to consumers. Yet, how do organizations get the most from these employees?

This study explored the lived experiences of late-stage career (IT) professionals as they navigated interpersonal risk in group settings. Grounded in psychological safety, psychological availability, and resources, the research employed Interpretative Phenomenological Analysis (IPA) to provide deeper insights into these experiences than prior quantitative studies. Data were collected through semi-structured interviews with ten participants. The experiences were analyzed to identify Personal Experiential Themes (PETs), consolidated into seven Group Experiential Themes (GETs): identity, reflections, norms, dilemma, control, boundaries, and resources.

The findings indicate that participants approached risky situations with a strong sense of self-identity, shaped by their past experiences and the influence of established norms. When faced with dilemmas, participants aimed for control through organized processes but often encountered difficulties concerning personal boundaries, necessitating careful resource management and decisions about risk engagement. Additionally, the study highlighted two critical resources, reputation and net wealth, which impacted participants' willingness to engage

in risky situations. Reputation emerged as a vital social asset related to career longevity, while net wealth indicated future economic security and life expectations. The findings introduce a resource framework to identify the most operative resources for the individuals involved in the study, which may aid future research and HRD practitioners in better understanding and prioritizing interventions and their development

This research enhances our understanding of how people navigate interpersonal risks, offering insights that can improve employee and leadership development programs, organizational structures, and workplace culture. It provides practical recommendations to create environments that support psychological safety and ensure resource availability, boosting performance, retention, and organizational success. The study concludes with recommendations for future research and reflections on the research journey.

ACKNOWLEDGEMENTS

First and foremost, I am grateful to my Savior and Lord Jesus Christ for His foresight in placing me in the right conditions and granting me the abilities and opportunities to pursue and complete this journey. I recognize that these blessings have been bestowed upon me, and I feel blessed to have the chance to pursue this program.

I am thankful for the support and encouragement from my wife, Missy, during these years. She gave me the time and space necessary to pursue this, but not without sacrifice. In moments of insecurity, she propped me up and sent me on my way. My children, Kate, Lizzy, and Maddi, provided insight and encouragement, even if they were unaware. Hopefully, this process has changed me for the better and has shown the kind of curiosity and dedication I hope to model for my children.

I must acknowledge the sacrifices of my parents, Adam and Diane. As a challenging child, they made sacrifices that helped me become who I am today. They sacrificed time and money to provide me with critical educational opportunities. They broadened my perspective through extensive travel and exposure to other cultures and communities. I brought these experiences to my research.

I thank my faculty advisor and dissertation chair, Dr. Tom Chermack. Tom has always been available to support and guide me through this process and was willing to engage in new methods and inquiries along with me. I also thank my committee members, Sue Lynham, Cliff Thomas, and Travis Maynard, who volunteered time and energy to support me. Lastly, I thank Trevor Smith for the encouragement and accountability every Friday as we pursued this journey together.

DEDICATION

This dissertation is dedicated to my wife, life companion, and best friend, Missy. She made personal sacrifices to enable me to pursue this life goal. In my twenties, I pursued another doctoral program. She was given some blame for my failure to complete the degree. That was not true. Meeting and falling in love with her showed me I was immature and lacked a solid foundation in life. Over the subsequent decades, she provided that foundation, urging me to become a better person and providing an example of a godly woman. Without her, I would not have found the courage or energy to finish this program. This program is also dedicated to my parents, who set me up for success, and my children, who have anchored me in life. Thank you, and I love you all.

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CHAPTER ONE: INTRODUCTION

Technology has become ubiquitous and embedded in modern society (Morrar et al., 2017). Consider the impact of digital maps and routing on transportation, streaming services on entertainment, or electronic medical records in healthcare delivery. These capabilities were deployed and maintained through complex information technology (IT) projects (Gupta et al., 2019). However, only 2.5% of all such IT projects achieve their initial design objectives (PwC, 2012). Why do these projects fail?

A systematic review of literature and practitioners identified ten common reasons for project failures (Antony & Gupta, 2017). Among these, management support and participation, tools and techniques, and scope definition and control were factors external to the success or failure of a project. Within the task execution of a project, factors such as team structure and size, learning, skills, communication, incentives, and resistance to change were identified as significant contributors to project performance. To address the multitude of factors and the magnitude of the financial impact driven by project failures, organizations are keenly interested in understanding what makes some project teams more successful than other teams.

For a practical example, in 2012, Google conducted a study on team productivity, code-named Project Aristotle, to better understand high-performing teams (Duhigg, 2016). Initially, this study revealed no common foundation or construct for high-performing teams. Some teams had the strongest leaders or the best talent but performed worse than lower "quality" teams. However, further analysis (Duhigg, 2016) identified that high-performing teams exhibited greater levels of two key attributes: conversational turn-taking (equal speaking) and above-average social sensibility (intuiting others' feelings or state of mind). This practical study found that teams that established commonly accepted norms for these two attributes appeared to

perform better. The researchers involved in this study were uncertain about how to classify these findings until they encountered Edmondson's (1999) concept of psychological safety, which they deemed the best comprehensive explanation. Overall, teams that permitted greater levels of interpersonal risk-taking, also called psychological safety, performed better.

Significant research has now been conducted on psychological safety, defined as a willingness to engage in interpersonal risk at the team level (Edmondson, 1999). Interpersonal risk arises during social interactions and involves exchanging risk and utility. More formally, it is described as the “willingness of an individual to give away personal influence and control” (Lundstedt, 1966, p. 9). Lundstedt (1966) offered this definition as a refinement of the concept of trust in relationships, arguing that trust is often expressed tautologically, as in “I trust the person because I rely upon him, have confidence in him, or am dependent upon him” (p. 3). These added qualifiers are circular, simply describing the attributes of trust. Similarly, Edmondson (2004a) made a crucial distinction between trust and psychological safety, which is examined further in Chapter 2.

Much of the research on psychological safety has been built upon the framework developed by Kahn's (1990) model for engagement. In his ethnographic study, Kahn (1990) was the first to provide a framework for engagement based on degrees of meaningfulness, availability, and safety. Working together and based on their intensity levels, these psychological conditions combine to form the degree of individual engagement in a workplace environment. Edmondson (1996a, 1996b, 1999) further developed Kahn's concept of safety as a distinct cognitive psychological state, separate from physical safety, to better understand how and when individuals contribute to team performance.

After the publication of Edmondson's (1999) seminal research, academic works on psychological safety surged to over 700 published articles each year (Edmondson, 2018). Most research in this area assumed a post/positivist epistemology, as indicated by the frequent use of quantitative methodologies (Edmondson & Bransby, 2023). Several comprehensive literature reviews have examined the breadth and depth of research (Edmondson & Lei, 2014; Newman et al., 2017; Edmondson & Bransby, 2023), focusing primarily on the antecedents (Edmondson & Mogelof, 2005), outcomes (Nembhard & Edmondson, 2012), and potential risks (Pearsall & Ellis, 2011) of psychological safety at various levels across individuals, groups, and organizations. The cited research within these reviews predominantly emphasizes environmental factors and conditions, such as leadership (Edmondson, 1999, 2003; Beinefeld & Grote, 2013; Carmeli et al., 2010; May et al., 2004), organizational practices (Carmeli & Zisu, 2009; Chen et al., 2014), and group dynamics (Roberto, 2002; Nembhard & Edmondson, 2006; Chen & Tjosvold, 2010) that may either inhibit or promote levels of psychological safety.

Together, these reviews and supporting studies have identified several gaps in the research, including a call to explore the relationship between resources and Kahn's (1990) defined psychological states. Edmondson and Lei (2014) and Newman et al. (2017) explicitly called for research into resource models and their connection to psychological safety. If psychological safety involves interpersonal risk, what precisely is at risk? What might an individual risk "giving away" to others? Kahn anticipated a role for resources in this engagement model through the concept of psychological availability. The inclusion of resources within the framework may offer some new insight.

Psychological availability is "the sense of having the physical, emotional, or psychological resources to personally engage at a particular moment" (Kahn, 1990, p. 714).

However, the concept of resources in psychological availability is generally limited to personal resources, such as personal energy or gratitude. It excludes other resources that may arise from organizational, social, or job design factors, which have been shown to contribute to levels of psychological safety. Functioning as independent phenomena, psychological safety, and psychological availability may not adequately explain the role of resources in interpersonal risk decisions “at the moment.” The combination of the unique resource features of each may reveal a broader spectrum of insights and results.

Several theoretical frameworks have been constructed by prior research to enhance our understanding of resource relationships. Newman et al. (2017) proposed an initial framework based on Hobfoll’s (1989) Conservation of Resources (CoR) theory, which provides a general model of resource categories, risk avoidance, and incentives. Together with other resource theories, such as the Job-Demand Resource Model (Demerouti et al., 2001) and Social Resource Theory (Foa & Foa, 1976), these resource-centric theoretical frameworks might offer new insights into when and how individuals decide to leverage their psychological availability and act within psychologically safe environments.

Due to a lack of qualitative research on psychological safety (Newman et al., 2017; Edmondson & Barnsby, 2023) and psychological availability, this study aims to explore and interpret the meanings behind an individual’s decision to employ or retain resources when choosing to engage in or withdraw from group activities. To support this proposition, an integrative literature review was conducted to outline the concepts, evaluate existing research, and examine theories related to psychological safety, psychological availability, resources, and their associated theoretical frameworks.

A proposed research method and design for conducting the inquiry are presented, including techniques and criteria for ensuring rigorous research that contributes to our collective knowledge base. This research employs a methodological approach of Interpretative Phenomenological Analysis (IPA) (Smith et al., 2022). IPA is grounded in a constructivist epistemology, where reality is constructed and understood within the subject's mind (Lincoln & Guba, 1985), and a philosophical foundation of hermeneutic phenomenology, which emphasizes how individuals interpret events through meaning (Heidegger, 1927/1982). This method is selected to complement prior quantitative research and offer new dimensions of depth and understanding of the phenomena. The outcome of this study is new and compelling narratives of the meaning themes experienced by individuals when deciding to expose their resources by engaging in interpersonal risk. This research aims to enhance the collective understanding of how psychological safety, psychological availability, and resources interact to create more effective interpersonal environments and, ultimately, improve organizational outcomes in activities such as executing complex projects.

Problem Statement

Kahn (1990) and subsequent researchers investigated psychological safety (e.g., Edmondson 1999, 2003; Beinefeld & Grote, 2013; Detert & Burris, 2007) and availability (e.g., May et al., 2004; Kahn & Heaphy, 2013; Li et al., 2022) as formed and experienced over time across and within defined environmental settings. No research on psychological safety and availability has been identified that investigated the moment of deciding to engage in interpersonal risk and how individuals perceive that decision. There is a gap in understanding how these phenomena are dynamically formed (Edmondson & Lei, 2014), as partly evidenced by an examination of the standard survey instruments. Surveys have typically assessed

psychological safety through questions like, “If you make a mistake on this team, it is often held against you” (Edmondson, 1999, p. 42). Psychological availability has been evaluated through survey questions such as, “I have the emotional resources to personally invest myself into my work role” (Byrne et al., 2016, p. 1227). Each instrument poses questions about general psychological states based on prolonged interactions within and across teams or with a leader. While Edmondson (1999) and Byrne (2016) conducted the necessary analyses to demonstrate reliability and validity, these surveys do not investigate the phenomenon at-the-moment of a decision.

This research investigates the unexplored micro-dynamics of individuals' at-the-moment resource decisions when considering whether to engage in interpersonal risk. This knowledge gap is evident in three ways. First, while psychological safety has been extensively explored in several research areas (Byrne et al., 2016; Wang et al., 2021; Ren et al., 2022), few studies incorporate Kahn’s original concept of psychological availability, and none identified have explicitly included the added dimension of resources. Secondly, as shown in Chapter 2, there is a lack of published constructivist inquiry employing qualitative research, with a notable absence of phenomenological studies. This gap leaves the depth and richness of individual experiences unexplored. Lastly, the level and unit of study will differ from existing research. In the IPA method, the study level focuses intrinsically on the individual, emphasizing the participant's experience. A phenomenological study may provide insights on a deeper level than studies investigating team, group, or organization-level events. This study concentrates on the specific phenomenon of an individual's at-the-moment decision event while considering the broader environmental factors. Therefore, the core problem this research aims to address is stated as follows:

The problem is that organizations may not be effectively leveraging late-stage employee skills and knowledge due to an underdeveloped examination of the employee's willingness to take interpersonal risk. This gap stems, in part, from prior research on psychological safety and availability, which has not adequately examined the "at-the-moment" experience of individuals choosing to engage or withdraw, especially within group settings.

Significance of the Problem

As previously noted, technology is embedded in our modern society, but the effectiveness of development and deployment teams can limit the rate and pace of these technological advancements. IT projects have been shown to overrun budgets by an average of 27%, with one in six exceeding budgets by 200% and schedules by nearly 70% (PwC, 2012). Project failures are estimated to cost the U.S. economy between \$50 and \$150 billion annually (Flyberg & Budzier, 2011). IT organizations with higher-performing teams could save billions in waste, create competitive advantages, and enhance customer satisfaction. While teams in sectors such as healthcare, education, and public services may also benefit from this study, the IT sector was chosen because it is essential to numerous industries worldwide and spans various stages of development. (Morrar et al., 2017; Ghobakhloo et al., 2023). Lastly, the author possesses the extensive experience and industry access necessary to conduct this research.

This study aims to enhance our understanding of how individuals experience decisions to put personal resources at risk when participating in team activities. A firmer grasp of the concepts and implications surrounding these decisions may lead to more effective incentive structures, team designs, and reward programs that could foster higher levels of team performance during project execution. This research explores the phenomenon within a specified

population of employees in the general I.T. industry. Specifically, it is hypothesized that late-career professionals aged 50-60, who may possess a broader range of resources, could experience unique differentials that might shed new insights into these experiences.

Purpose of the Study

This study investigates and interprets the lived experiences and meanings individuals ascribe to their decisions to put resources at risk within a group setting. Ultimately, this research aims to develop a deep and rich analysis of these experiences to inform new methods and constructs that may enhance project outcomes and reduce billions of dollars in waste. This research employs a different approach to understanding the phenomenon to achieve these goals. A qualitative phenomenological approach was used to capture and reveal the underlying meanings of these experiences from the individual's perspective. A population of late-stage career individuals was selected to isolate and understand convergent and divergent meanings. The results of this research aim to guide practitioners in designing programs and incentives to enhance project outcomes, generate new insights, and pose questions for potential future research.

Research Question

The primary research question that forms the foundation of this study is: *How do individuals understand the lived experience and meaning ascribed to their decisions to put their resources at risk within a group setting?* This research's primary objective is to identify common and divergent experiential themes of meaning associated with resource decisions when engaging in interpersonal risk, specifically among a purposefully selected group of late-stage career IT professionals. While phenomenological research typically adopts an atheoretical perspective, interpretative phenomenology allows for introducing secondary questions informed by existing

theories, provided these questions do not limit the investigation or results (Beck, 2021). Consequently, a secondary research question is investigated: *If resources act as enablers or constraints in these decisions, and if so, which types of resources are most operative in these decisions?* Do late-stage IT professionals feel more secure given their attained level of personal resources, or are they, considering they may have more at stake, less inclined to take risks? Under what circumstances would they be more or less willing to embrace a risk? Understanding these conditions could help organizations create better environments for teams to thrive and enhance organizational and project outcomes.

Introduction to Research Design and Methods

The following sections describe this study's research paradigm, methodology, and design. These summaries detail the ontological, epistemological, and methodological positions that underlie the research (Guba, 1990). Chapter 3 provides more detail on the research design and method. Chapter 4 presents the results derived from the research design and methods discussed in this chapter.

Research Paradigm

A paradigm is a fundamental set of beliefs (Guba, 1990) that guide systematic research in addressing questions about the nature of reality (ontology), the relationship between the inquirer and the knowable (epistemology), and the methods for conducting inquiry (methodology). Identifying the appropriate paradigm for this research was an iterative process, beginning with a comprehensive examination of the extant research on psychological safety, availability, and resource theory. Throughout that process, it became apparent that the level and unit of analysis—the individual and the decision made at the moment to engage—had not been thoroughly

investigated. The focus of this study, the decision itself, is a personally experienced phenomenon that aligns with the constructivist paradigm and phenomenological method.

Research does not aim for predictability or control over real-world phenomena within the constructivist paradigm. Instead, it seeks to “reconstruct the ‘world’ at the only point at which it exists: in the minds of the constructors” (Guba, 1990, p.27). This formulation integrates a relativist ontology, a subjectivist epistemology, and a hermeneutic or dialectic methodology (Guba, 1990). It is relativist in that it positions inquiry within a multitude of mental constructs shaped by local, social, and experiential content held and constructed by the subject. Their understanding of reality is what constructs meaning. It is subjective in that the unique combination of subject and content forms a unified personal entity (Guba, 1990). Finally, it is hermeneutical and dialectic in that it creates meaning through a process of thesis, antithesis, and synthesis to form a consensus of experience and understanding (Hegel, 1991). The constructivist paradigm emphasizes understanding and interpreting a personal reality within the individual experiencing the phenomenon.

Methodology

The research methodology outlines how the inquiry seeks knowledge, establishes its guiding principles, and describes its process (Schwandt, 2014). Given the prevalence of quantitative research focusing on the “what” and “when,” a qualitative research design was selected to explore the “how” or “why” of these phenomena. This design aims to understand the concepts of the whole and its parts, their interrelations, and how the phenomena compare to the “other” (Wertz, 2011). With the unit of analysis defined as personal experiences in resource decisions at the moment, a phenomenological approach has been chosen as the suitable methodology for this study.

Phenomenological schools of inquiry are generally bound between the philosophies of Edmund Husserl (1859-1938) and Martin Heidegger (1889-1962). Husserl built on Brentano's work in descriptive psychology to form the first of these two schools, transcendental or descriptive phenomenology (Van Manen, 2014). The objective of this philosophical methodology is to suspend one's pre-theoretical understanding of a phenomenon by going "back to the things themselves" (Husserl, 2002, p. 35). Husserl's methodology is fundamentally epistemological, aiming to create a description that reveals the essence of lived experience.

As a student of Husserl, Heidegger rejected the separation of subject and object found in transcendental phenomenology (Van Manen, 2014; Beck, 2021). Heidegger argued that human consciousness and experience are inextricably and ontologically interconnected through a dialectical process of interpretation that generates meaning (Van Manen, 2014; Zahavi, 2018). Heidegger and later philosophers developed a hermeneutic or interpretative phenomenology, offering different perspectives and approaches than Husserl's. This framework was designed to move beyond mere description to cultivate an authentic understanding of the meaning of experience.

When considering these two general schools of phenomenological inquiry with the proposed unit of analysis and research questions, it was determined that a hermeneutic or interpretative approach was the most appropriate. Individuals making resource decisions in group settings navigate a complex landscape of individual, intrapersonal, and interpersonal dynamics to evaluate the risk of resource allocations. This process entails interpreting signals, symbols, experiences, and potentialities. An interpretive approach may more thoroughly explore and develop the meaning of these conditions through rich insights into individual experiences.

Method

This research utilizes Smith's (1996) Interpretative Phenomenological Analysis (IPA) method within a framework of hermeneutic phenomenology. Data was gathered and analyzed through semi-structured interviews with late-stage IT career professionals to identify the experiential themes of meaning they encountered during resource decisions. Participants were intentionally selected based on their knowledge and experience (Creswell, 2013), interview availability, and willingness and ability to effectively share their experiences with the interviewer (Bernard, 2002). Although phenomenological inquiry is generally encouraged to remain unconstrained by preexisting theories and frameworks (Van Manen, 2014), Smith (1996) provides a general model for analyzing and reporting lived experiences that can build upon, test, and refine existing models.

Quality Criteria

To ensure that this research was acceptable within the rigor of academia, the criteria for assessing quality must align with the research type and intent (Maxwell, 2012; Morse, 2015). Lincoln and Guba (1985, 1986) provided criteria for qualitative research focused on trustworthiness. Trustworthiness includes criteria comparable to the reliability and validity standards found in post/positivist research (Corbin & Strauss, 2014) and consists of dependability, confirmability, transferability, and credibility (Lincoln & Guba, 1985; Lincoln & Guba, 1986). These served as the standards established for conducting this research.

A complete and accurate audit trail provided evidence of dependability, such that results were consistent with the data collected (Merriam & Tisdell, 2015). Confirmability was achieved through regular and accurate reflexive journaling to record personal reflection, awareness, and bracketing procedures to identify and isolate biases (Lincoln & Guba, 2013). To achieve

transferability, literal responses from interviews were cited to generate rich and thick descriptions that allow the reader to participate in the lived experience of the member (Lincoln & Guba, 1986). The role of the researcher in IPA, including methods for achieving high-quality research, was positioned and bounded to improve the quality of the findings. Procedures involving memoing, journals, and member checking satisfied the criteria for credibility. The above are general criteria for ensuring the quality and credibility of qualitative research and are further articulated, along with methods specific to Smith's IPA phenomenology, in Chapter 3.

Definitions

This section defines key terms to ensure a consistent understanding and application of concepts throughout this research. The key terms defined are (1) psychological safety, (2) psychological availability, (3) resources, and (4) late-stage career professional. Each term is elaborated on and applied in context within Chapters 2 and 3 below.

Interpersonal risk: "Willingness of an individual to give away personal influence and control" (Lundstedt, 1966, p.9).

Psychological safety: "The belief that the work environment is safe for interpersonal risk-taking" (Edmondson, 1999, p. 354).

Psychological availability: "The sense of having the physical, emotional, or psychological resources to personally engage at a particular moment." (Kahn, 1990, p. 714)

Resources: "Anything perceived by the individual to help attain his or her goals." (Halbesleben et al., 2014, p.5)

Late-stage Career Professional: An individual aged between 50 and 60 with at least five years of experience in the IT industry, not limited to any single company or organizational model.

The terms “engagement” and “to engage” are frequently used in this study. These terms are employed solely in a functional sense to signify an action, rather than in a theoretical sense to describe conditions that indicate levels of involvement or participation in an event. Furthermore, the willingness to engage is rooted in the “at-the-moment” experience. The choice of “at” instead of “in” is intended to position the experience temporally, rather than as a statement of focus or intensity, as noted in some research on engagement (e.g., Kahn, 1990). Lastly, while the investigation focuses on the singularity of an encounter, many of the stories examined are composed of multiple moments that merge into an overall experience.

Conclusion

This dissertation examines individuals' “at-the-moment” decisions regarding whether to engage in interpersonal risk within a group setting. By providing a more profound and contextualized understanding of these experiences, this study aims to offer insights that could enhance individual, team, and organizational outcomes. Chapter 1 presents the introduction, problem statement, issue significance, purpose statement, and primary and secondary research questions to establish the research's aim. Preliminary descriptions of the chosen research paradigm, methodology, methods, and quality criteria are included to anchor the program in widely accepted academic standards.

Following this chapter, Chapter 2 presents an integrative literature review (Torraco, 2005; Torraco, 2016) of existing research on psychological safety, psychological availability, and resource theory, identifying the gaps necessary to justify the proposed scope and research

question. Chapter 3 elaborates on and supports a phenomenological research paradigm, quality standards, and processes. Chapter 4 thoroughly analyzes the collected data, including appropriate rich and thick descriptions supported by in-context quotations. Finally, Chapter 5 outlines the conclusions and recommendations based on the findings and guidance on practice, future research, and theory building.

CHAPTER TWO: LITERATURE REVIEW

Introduction

Phenomenological research aims to uncover either the morphological essence (Husserl, 2002) or manifestations (Heidegger, 1982; Heidegger, 2010) of a lived human experience. A phenomenological researcher should pre-reflectively approach the phenomenon to reveal the underlying meaning with a sense of wonder and naiveté (van Manen, 2016) and avoid constraining themselves to pre-existing theory (Merleau-Ponty, 1962). However, in the early stages of exploration, existing research and theories may be utilized to position the proposed inquiry within a field but should be restricted when analyzing and interpreting the phenomena (Giorgi, 1992; Smith, 2009). The extant research and theories serve as a “constant source of reference” to help maintain focus during the research process (Zahavi, 2018). Consequently, a literature review is provided to identify the relevant grounding references for this inquiry.

This section examines the literature relevant to the proposed research, organized into four main sections. The first section outlines the foundational principles of psychological safety and psychological availability within Kahn’s (1990) model for engagement. The following two sections present integrative literature reviews (Torraco, 2016) that individually explore, analyze, and synthesize the historical, theoretical, and empirical bases of psychological safety and psychological availability. Each section investigates the underlying relationships contributing to these psychological conditions by investigating their antecedents and how they may act as potential mediators or moderators.

The fourth section presents an overview of the literature on the concept, structure, and use of resources. This review offers a taxonomy for reference during data analysis. The final section also examines several working theories related to resource exchange. In accordance with

standards for phenomenological research, these theories are provided solely to establish a well-informed knowledge baseline rather than to limit future insights. These sections will serve as the foundation for the taxonomy and a theoretical framework regarding the interplay between resources, psychological safety, and psychological availability explored in this research.

Kahn's Framework for Engagement

This sub-section describes Kahn's (1990) model for engagement to establish psychological safety and availability. He challenged the prevailing one-dimensional view of engagement, characterized by generalized states of person-role job involvement, commitment, and alienation. He conducted an ethnographic study to explore how individuals perceive themselves as "self-in-role" and their connection to work. His inquiry focused on "the moments in which people bring themselves into or remove themselves from particular task behaviors" (Kahn, 1990, p. 693). Kahn conducted two qualitative studies to examine individuals' psychological states and interactions with their roles and work.

His framework rests on two fundamental tenets. First, an individual's psychological experiences at work shape their attitudes and behaviors (Hackman & Oldham, 1980). Second, these experiences are concurrently and continuously influenced by individual, interpersonal, group, intergroup, and organizational factors (Alderfer, 1985). Although limited by the chosen methodology in his initial study, Kahn aimed to create a generalizable engagement model by exploring individuals' psychological states and experiences within their work environments.

Scholars have proposed various definitions of engagement, ranging from Rothbard's (2016) focus on employee role absorption to Maslach et al.'s (2001) emphasis on energy and involvement. Kahn (1990) anchored his study on the concept of "self-in-role," defining engagement as "the harnessing of organization members' selves to their work roles; in

engagement, people employ and express themselves physically, cognitively, and emotionally during role performances” (Kahn, 1990, p. 694). Conversely, personal disengagement is characterized by withdrawal, defense, and detachment of the self from work. Kahn grounded these concepts (Alderfer, 1985; Maslow, 1954) in an individual’s desire for both self-expression (displaying oneself within the role) and self-employment (applying personal energy to the role). Unlike other definitions, Kahn (1990) situates engagement within the “self” as a psychological phenomenon within a specific context moment.

Kahn (1990) completed two qualitative studies combining grounded theory and ethnography. The sample organizations were explicitly chosen to contrast and explore physical, emotional, and cognitive differences. The first study involved counselors for affluent Western adolescents at a summer camp in the Caribbean. The environment was highly unstructured, physically demanding, and emotionally challenging. The second organization selected was a US-based architectural firm with a defined, strict hierarchy and low physical but high cognitive demands. Data collection methods for both studies included in-depth interviews, transcription, in-vivo, and thematic coding, concluding with descriptive statistical analysis of ratings and codes.

Kahn's (1990) research yielded three psychological conditions influencing how individuals perceive themselves when in the role: meaningfulness, safety, and availability. Kahn (1990) argued that individuals unconsciously consider three pivotal questions when situationally deciding to engage or disengage: “(1) How meaningful is it for me to bring myself into this performance? (2) How safe is it to do so? and (3) How available am I to do so?” (p.703). These inquiries collectively shape each engagement decision, serving as a framework for evaluating the risks and benefits inherent in a particular situation.

Meaningfulness

Employees are intrinsically motivated to find meaning in their work (Frankl, 1992). In this context, meaning is a subjective sense-making process that attributes significance to work. It is derived from a sense of purpose, participation in something larger than oneself, and relationships with others who share common purposes (Kahn & Heaphy, 2013). Conversely, meaningfulness reflects the degree of positive significance an individual perceives and assigns to a phenomenon (Rosso et al., 2010). Meaningfulness is created through mechanisms of authenticity (perception of true self), self-efficacy (personal power and ability), self-esteem (sense of self-worth), purpose-directedness (intentionality), belongingness (significant interpersonal relationships), and transcendence (superseding the ego) (Rosso et al., 2010).

Meaningfulness is contextual and deepens (i) within collectives where burdens and resources are shared, (ii) when individuals attach to leaders who create a vision and enlarge the mission, and (iii) when employees recognize the benefits their work has on others (Kahn & Heaphy, 2013). It is defined as a “feeling that one is receiving a return on investments (amount or level) of one's self in a currency of physical, cognitive, or emotional energy” (Kahn, 1990, p.704). This results in personal growth and work motivation (Spreitzer et al., 1997). In contrast, the absence of meaningfulness can lead to alienation (Aktouf, 1992) and may be perceived as a sense that expectations and demands on oneself are low, coupled with limited ability to perform in work roles (Kahn & Fellows, 2013). Finding or lacking meaningfulness seems to influence an individual's self-perception when engaging in roles and tasks in a work environment.

Job enrichment, work-role fit, and co-worker relations create and sustain a sense of meaning. Employees find meaning in their work, but this meaning can range from a dire sense of necessity to a source of personal freedom and growth (Budd, 2011). However, not all work will

be meaningful, as meaningfulness extends beyond job roles and tasks into voluntary activities that hold perceived transcendent value for one's sense of purpose (Baily & Madden, 2019). Although meaningfulness has been shown to affect personal engagement significantly (May et al., 2004; Byrne et al., 2017), not all work is meaningful (Dik et al., 2009; Baily & Madden, 2016; Baily & Madden, 2019). This inquiry briefly examines meaningfulness to provide context and grounding to Kahn's original model. However, it is hypothesized that it acts as a moderator rather than a prerequisite for resource decisions and, thus, is not included in this research's theoretical framework or analysis.

General Method of Inquiry

This sub-section outlines the methods for collecting and reviewing literature on psychological safety and psychological availability. While the subsequent discussion creates an integrative literature review (Torraco, 2016), the initial data sets were developed using the systematic literature review methods outlined by PRISMA (Page et al., 2021). The search query was conducted across three major academic databases: Business Source Complete, PsycINFO, and Academic Search Premier. These databases were selected to ensure comprehensive coverage across fields such as business and management, behavioral and social sciences, and interdisciplinary studies. Search criteria were limited to English-language peer-reviewed publications from 1999 to 2024. After retrieving the search results, the abstract of each article was reviewed. Articles deemed non-empirical, conceptual, theoretical, or lacking academic rigor were excluded from consideration. Research focused on children, adolescents, and students was excluded due to the specific adult demographic targeted in this study. The selected articles collectively represent concepts relevant to this research.

For the initial exploration of the literature on psychological safety, a search was conducted using the keyword "psychological safety," resulting in 930 articles. After reviewing the abstracts and methodologies, 598 articles remained. Among these, 64 articles utilized a qualitative method, with only one adopting a phenomenological approach. To capture additional relevant data, a "snowballing" strategy (Greenhalgh & Peacock, 2005) was used by examining the reference sections of four prominent literature reviews (Edmondson & Barnsby, 2023; Edmondson & Lei, 2014; Frazier et al., 2017; Newman et al., 2017), seminal works, and other highly cited sources.

A comparable approach was utilized to evaluate the literature concerning psychological availability. The initial database inquiry utilizing the keyword "psychological availability" yielded insufficient results. Consequently, the criteria were broadened to encompass all disciplines. This extensive search yielded 100 peer-reviewed articles in English published between 1999 and 2024. After examining the abstracts and methodologies, 59 articles were deemed appropriate for further analysis. Among these, none were qualitative, and only one was conceptual. Although no literature reviews were identified, the refined population was augmented through an analogous "snowballing" process (Greenhalgh & Peacock, 2005) by scrutinizing references from seminal and widely cited works articles.

Psychological Safety

This sub-section provides a comprehensive overview of the origins and antecedents of psychological safety and subsequently examines its role as both a mediator and a moderator. The objective is to establish a solid foundation for reviewing existing research and concepts, identifying gaps in the literature, and grounding the objectives of this research.

Origin and Historical Underpinnings of Psychological Safety

The origins of psychological safety can be traced back to Schein and Bennis (1965), who posited that safety is a fundamental prerequisite for individuals to navigate change and embrace uncertainty. Building on Lewin's (1947) change model, Schein and Bennis asserted that creating a safe environment is a prerequisite to the initial unfreezing stage and involves reducing interpersonal risks. Without this condition, individuals may resist change by becoming inflexible and self-protective. Conversely, an environment that fosters safety may encourage openness to interpersonal cues and promote collaborative connections among like-minded individuals (Schein & Bennis 1965).

In the workplace, Kahn (1990) pioneered the examination of safety in personal engagement as being “able to show and employ one’s self without fear of negative consequences to self-image, status, or career” (p. 708). However, only two identified academic works explored safety in the work context during the subsequent decade, and the term safety was used broadly, detached from any specific modifiers. Senge (2006) briefly discussed psychological safety in his popular work, *The Fifth Discipline*, in the context of team learning. He positioned team learning as one of the five components of organizational learning, emphasizing that dialog and discourse can only be effective in an environment safe for challenges to oneself and others.

Edmondson's (1999) seminal research on team learning significantly enhanced our understanding of safety by linking it to psychological dimensions. She introduced the term "psychological safety" as "the belief that the work environment is safe for interpersonal risk-taking," which serves as the working definition for this paper (p. 354). Her findings indicated that psychological safety primarily manifests in team environments (Edmondson, 2003; 2004a;

2004b; 2008). This definition has since established itself as the standard conceptualization of psychological safety in academic and practice publications (Newman et al., 2017).

Psychological Safety as a Distinctive Construct

Psychological safety is distinct from psychological empowerment. Psychological empowerment embodies a positive motivational state characterized by four cognitive dimensions: meaning, self-determination, competence, and impact. These conditions confer a sense of control over a specific task or job (Spreitzer, 1995). In contrast, psychological safety revolves around an individual's perception of the broader work environment and evaluating interpersonal risk opportunities (Carmeli & Gittell, 2009). While psychological empowerment centers on control, psychological safety speaks to risk.

Psychological safety is also distinct from trust. While both trust and psychological safety guide interpersonal risk judgments, Edmondson (2004a) identified three key distinctions. Trust revolves around a didactic relationship with the "other," whereas psychological safety emphasizes the "self." This alignment resonates with Kahn's (1990) self-focused model of engagement. Additionally, psychological safety is temporally anchored in the immediate context, while trust decisions extend into the future. Once again, the temporal "at-the-moment" nature of psychological safety corresponds with Kahn's (1990) model. Lastly, trust occurs between individuals, whereas psychological safety emerges as a group phenomenon (Edmondson, 1999). Although both concepts center on risk, there are significant differences in their underlying theories and applications research.

Interpersonal Risk

Lundsedt (1966) constructed a theory of interpersonal risk in response to what he believed to be a tautological use of the term *trust*. He argued that to use the term trust, it must be

grounded in a personalized understanding of confidence, reliance, or dependence on another. To explain, he (Lundstedt, 1966) observed the following

To be understood as a causal relationship, the sentence requires that we define trust by qualifying phrases such as "I trust the person because I rely upon him, have confidence in him, or am dependent upon him." Why must these extra terms be used? Because (here is the tautology) we do all these things because we *trust* the person, and so the explanation is circular. (p. 3)

To escape this circular reasoning, he defined interpersonal risk as a "willingness of an individual to give away personal influence and control" (Lundstedt, 1966, p.9). These exchanges occur in social interactions and involve an exchange of risk and utility. In each situation, individuals must balance a deep-seated desire for belongingness and intimacy with the risk of rejection or loss as the relationship evolves (Cavallo et al., 2013). This dilemma arises when an individual's desire for belongingness and connectedness in pursuing interpersonal relationships clashes with an inherent motivation to shield themselves from rejection and harm (MacDonald & Leary, 2005).

A dual-process risk regulation system that engages cognitive, behavioral, and affective structures has been proposed to minimize the pain of rejection dynamically (Murray et al., 2006). Within this system, the temporality of risk influences the speed of protective tendencies. Imminent risk leads to immediate, automatic self-protective actions and avoidance, while distant risk allows for the potential development of connectedness (Murray et al., 2008). A secondary executive control system uses if-then procedural rules to balance risk conditions with potential outcomes in ambiguous conditions dynamically. Individual levels of self-esteem influence the boundaries of these if-then conditions, with those possessing low self-esteem governing these conditions more strictly than those with higher levels (Murray et al., 2006). An individual's risk

regulation system is shaped by personalized levels of self-esteem, trust, and rejection sensitivity (Cavallo et al., 2013).

Edmondson (1999) positioned interpersonal risk as a crucial element of psychological safety. By grounding psychological safety in interpersonal risk rather than trust, Edmondson (2004a) advocated for a deeper understanding of the concept, one that emphasizes what can be gained or lost rather than what has already been achieved or maintained.

Antecedents to Psychological Safety

Kahn (1990) identified four categories of antecedents to psychological safety: interpersonal relationships, group dynamics, leadership behaviors, and organizational practices and norms. Edmondson and Mogelof (2005) later introduced individual trait characteristics as additional antecedents. Additionally, holding environments have been proposed as factors contributing to psychological safety (Kahn & Heaphy, 2013). Together, these six categories of antecedents are examined to enhance the understanding of the factors that foster psychological safety.

Interpersonal Relationships

The nature and quality of interpersonal networks influence levels of psychological safety. Interpersonal relationships foster psychological safety when open, supportive, and trusting (Kahn, 1990). Employees seek cues from their coworkers regarding norms and workplace behaviors (Wiesenfeld et al., 2001), which include support from colleagues (Scheper et al., 2008), displays of caring within the team (Bstieler & Hemmert, 2010), and trust (Zhang et al., 2010; Carmeli & Zisu, 2009). Conditions marked by disconnectedness, perceived threat, and power imbalances heighten perceptions of interpersonal risk and hinder interaction and

engagement (Appelbaum et al., 2016; Kahn, 1990). The quality of both formal and informal social networks significantly shapes the contours of psychological safety.

Group Dynamics

Psychological safety manifests in team contexts (Edmondson, 1999; 2003; 2004). A team is a collective assembly of individuals united by a shared objective or task (Hoegle & Germuenden, 2001) who harness their collective knowledge to achieve outcomes. This potential relies on each member's willingness to share their expertise (Alsharo et al., 2017). At the team level, psychological safety is shaped by previous interactions and familiarity (Roberto, 2002), strong intra-team relationships (Gu et al., 2013), the positional status of the team (Nembhard & Edmondson, 2006), internal team structure (Beinefeld & Grote, 2013), shared reward frameworks (Chen & Tjosvold, 2010), and the degree of boundary work performed by the team (Faraj & Yan, 2009).

The type and quality of networks within teams affect levels of psychological safety. Team members who cultivate high-quality relationships within their social network experience increased psychological safety, which promotes learning from failures to enhance team outcomes (Carmeli & Gittell, 2009; Brueller & Carmeli, 2011). Social Learning Theory has been suggested as a reason for the strength of social networks through which groups learn from failure (Carmeli, 2007). The quality of social networks experienced within groups and teams, both formal and informal, influences levels of psychological safety.

While virtual teams, as a form of social network, have become more frequent over the past few decades, COVID has significantly accelerated their adoption and use (Chai & Park, 2022). Foster et al. (2015) used the term "virtuality" to signify when teams are affected by distance, both physically and temporally, along with self-categorization, which may further

negatively impact team processes, emergent states, and team outcomes. As teams transition to virtual formats, the lack of observable behaviors typically found in co-located teams for establishing and maintaining trust renders building trust among virtual teams more complex and vulnerable to uncertainty (Riegelsberger et al., 2003). Additionally, with fewer opportunities for engagement and development, the team may experience reduced chances to cultivate the shared experiences necessary for developing psychological safety.

Due to the lack of standard cues and arguably less effective modes of communication, virtual teams primarily develop trust based on cognition, as technology often limits the transfer of cues such as feelings and emotions (Kanawattanachai & Yoo, 2002). According to Social Presence Theory, effective communication requires the employed medium to provide the appropriate social presence necessary for the interpersonal interaction demanded by the task (Cheng, 2008). Limitations from distance or ineffective communication mediums impede the desire, if not the necessity, for team members to show their capabilities and integrity before gaining acceptance from other team members. Alsharo (2017) argued that sharing knowledge within virtual teams fosters trust and collaboration, positively influencing team effectiveness. Gibson and Gibbs (2006) proposed that high levels of psychological safety can lessen the negative impacts of geographical dispersion, reliance on electronic communication, dynamic structure, and national differences on team innovation diversity.

Leadership Style and Behaviors

The behaviors exhibited by leaders profoundly influence levels of psychological safety (Edmondson, 1999). Variations in psychological safety levels arise from team structure and leadership conduct, with lower-status team members often hesitating to express their views (Edmondson, 1999; 2003). Leaders act as architects of relationships, shaping, reinforcing, or

disrupting norms and either fostering or inhibiting individual psychological safety. Inclusive leadership, marked by behaviors that promote engagement and feedback, can encourage a climate of psychological safety at the individual level (Beinefeld & Grote, 2013). Other leadership styles, including transformational leadership (Deter & Burris, 2007), servant leadership (Schaubroeck et al., 2011), and improvement-oriented leadership (Halbesleben & Rathert, 2008), have also been identified as antecedents to psychological safety. A leader's perceived level of support (May et al., 2004), integrity (Palanski & Vogelgesang, 2011), and openness (Detert & Burris, 2007) impact levels of psychological safety. At the team level, coaching practices (Edmondson, 1999), trust in the leader (Li & Tan, 2013), and ethical change-oriented leadership (Walumbwa & Schaubroeck, 2009) are linked to increased psychological safety. Leaders' behavioral choices and engagement significantly shape the psychological safety landscape groups.

An analysis of the literature indicates that researchers often view theories of social exchange and social learning as the foundational concepts for how supportive or inclusive leaders impact levels of psychological safety (Newman et al., 2017). Social Exchange Theory positions a supportive leader as the progenitor of a safe learning environment where group members reciprocate supportive knowledge-sharing actions within the team (Chen & Tjosvold, 2014; Schaubroeck et al., 2011). In contrast, Hirak et al. (2012) contended that Social Learning Theory (Bandura, 1977) more effectively explains levels of psychological safety through the behaviors of inclusive leaders who model actions such as listening, support, trust, and respect within their group. Newman et al. (2017) suggested that learning conditions and leader emulation, as articulated by Social Learning Theory, foster more sustainable levels of psychological safety than those found in the transient and transactional nature of Social

Exchange Theory. In both frameworks, research identifies leaders and their behaviors as a critical element in understanding the phenomenon of psychological safety.

Organizational Practices

Perceived levels of organizational support influence psychological safety (Carmeli & Zisu, 2009). Access to mentoring bolsters organizational outcomes through the intermediary role of psychological safety (Chen et al., 2014). Singh et al. (2013) suggested that organizations that utilize diverse group compositions promote high levels of psychological safety, fostering employees' social identification with the organization. Singh et al. (2013) employed Social Identity Theory to explore the role of diversity practices in an organization to advance psychological safety. They contended that psychological safety is nurtured through diverse group composition, encouraging employee social identification with the organization.

Work design characteristics, as defined by the organization, impact the psychological conditions of employees. According to Hackman and Oldham's (1976) Job Characteristics Theory, when work design characteristics convey signals of trust, autonomy, and role clarity, "jobholders will experience a positive, self-generated affective 'kick' when they perform well, and this internal reinforcement serves as an incentive for continued good performance" (Hackman & Oldham, 1980, p. 60). Edmonson (1999) expanded work design conditions to include expectations of employee interdependence in task execution.

The impact of organizational change practices on team psychological safety. Contrary to expectations, she found that entities experiencing significant change within the last eighteen months, such as reorganization efforts, displayed higher levels of psychological safety than stable organizations. This finding implies that change may enhance opportunities for communication and engagement, fostering the establishment of new organizational and cultural

norms. Organizations can positively influence psychological safety through the programs, designs, and structures they implement, signaling their commitment to employees.

Individual Characteristics

Given that psychological safety is a state manifested within an individual (Kahn, 1990), albeit within the framework of a team context (Edmondson, 1999), personal attributes have been suggested as antecedents. Frazier et al. (2017) demonstrated that traits such as proactive personality, emotional stability, and learning orientation foster psychological safety. Individuals with proactive personalities are likelier to sense that a situation is safe despite contrary indicators (Chan, 2006; Detert & Burris, 2007). Similarly, May et al. (2004) found that levels of psychological safety are influenced by degrees of self-consciousness, but only when personal resource levels (i.e., psychological availability) are considered. Chiu et al. (2011) discovered that a strong inclination toward learning orientation acknowledges that errors are essential to self-development, contributing to psychological safety. Individuals with these traits are more inclined to approach problems with curiosity and seek solutions regardless of the context conditions.

In addition to traits, previous experiences influence a person's decision to engage in interpersonal risk (Detert & Edmondson, 2011). Prior experiences create implicit voices within the individual that affect attitudes and resource decisions in various degrees and ways. Implicit voice refers to "taken-for-granted beliefs about when and why speaking up at work is risky or inappropriate" (Deter & Edmondson, 2011, p. 461). Deter and Edmondson's (2011) study suggested that implicit voice, individual characteristics, dispositions, and demographics explain why presuppositions about leadership behavior may be more powerful than a leader's demonstrated and explicit behaviors. Implicit voices function as filters, if not limiters, regarding

how individuals determine whether engaging is psychologically safe (Deter & Edmondson, 2011).

Liang et al. (2012) further separated implicit voice into promotive and prohibitive speech. These two forms serve distinct organizational roles, resulting in different outcomes. The promotive voice is linked to innovation and creativity by enhancing existing work practices, procedures, or behaviors to benefit the organization. In contrast, the prohibitive voice aims to protect the self, group, or organization from harm due to the risks or weaknesses inherent in current practices, procedures, or behaviors. These prior experiences, both positive and negative, contribute to the decision-making process regarding future interpersonal risk-taking opportunities. The extent to which individuals are influenced by and receptive to their implicit voices affects their ability to achieve and maintain levels of psychological safety.

Holding Environments

The notion of a holding environment was initially advanced by psychologist Winnicott (1965) as a framework for a nurturing relationship between mothers and their newborn children, colloquially known as "good-enough mothering." Shapiro and Carr (1991) extended this concept to organizational theory. Holding environments represent temporary spaces where individuals grappling with profound anxiety find solace and are then revived by others until a sense of equilibrium is regained. These environments are introspective domains where members are embraced and contained, and meaning is derived from distress (Hinshelwood, 2001).

Three types of holding environments progress from passive to active states (Kahn & Heaphy, 2013). Containment is the most passive, where the supporting group makes themselves available, attends to others, and inquires with kindness and acceptance. Next, empathetic acknowledgment is applied to foster curious inquiry and generate empathy for insight moving

towards validation. Lastly, enabling perspective uses self-reflection to generate active insight and sense-making of the experience of others to navigate through anxious situations. Under these conditions, individuals feel safer re-engaging and undertaking future interpersonal risks within the organization or group. For a holding environment to prove efficacious, the focus of the collective must shift from the task itself to attending to the well-being of the individual in need (Kahn & Heaphy, 2013). Under these conditions, individuals perceive a heightened sense of safety to re-engage and embrace future interpersonal risks within the organizational or group context.

Psychological Safety as Mediator/Moderator

The level of psychological safety varies significantly among teams within the same organization and across diverse organizations (Edmondson & Mogelof, 2006). These findings substantiate Edmondson's (1999) argument that psychological safety emerges at the group level, with outcomes partly dependent on the variability of the previously mentioned antecedent factors. The following exploration examines psychological safety's mediating and moderating effects on conditions and outcomes that may affect group variability.

Safety and Error Reporting

Numerous industries have undertaken efforts to understand the nature of effective teams better. These early inquiries focused on capital-intensive and high-risk sectors, such as aviation, hospitals, and mining. Beginning in 1979 with Cockpit and later Crew Resource Management (CRM) programs, the aviation industry examined team structures and relationships to improve safety (Helmreich et al., 1999). Real or perceived status differentials within a team can negatively impact necessary communication levels, resulting in suppressed error reporting and increased error rates (Edmonson, 2003). The role of psychological safety as a mediating factor

between crew coordination and communication has been recognized as helping to prevent or reduce potential disasters (Ford et al., 2014; Perkins et al., 2024).

Building on this foundation, Edmondson (1999, 2003, 2004) expanded the research into healthcare to identify the circumstances under which error reporting is either discouraged or encouraged and the subsequent outcomes. Her investigations revealed that teams with higher levels of psychological safety reported errors more frequently yet experienced fewer actual errors than teams with lower psychological safety levels. This finding was further supported by Nembhard and Edmondson (2006), who examined performance and error reporting within neonatal units across multiple hospital settings. More recently, O'Donovan et al. (2020) validated and expanded Edmondson's original works (1996, 1999, 2004) through a mixed-method longitudinal study designed for healthcare practitioners. These findings have been confirmed in several other industries, including construction (Shen et al., 2015) and aviation (Bienefeld & Grote, 2013).

Perhaps one of the riskiest and most explicit examples of the mediating effects of psychological safety is found in the international mining company Anglo American and its first female CEO, Cynthia Carroll. Edmonson (2018) described Carroll's decisions and actions as the newly appointed leader of one of the most dangerous mines in South Africa. Carroll took an unprecedented step to address life-threatening working conditions by halting all mining operations and convening culturally appropriate village meetings, known as *lekgotla*, to promote a psychologically safe environment for local leaders to engage and develop practical solutions. Once mining resumed, although revenue was lower than in previous periods, fatalities plummeted, and profits reached record highs.

A cross-industry analysis conducted by Probst and Estrada (2010) effectively summarized the mediating role of psychological safety in error reporting and safety. The authors examined five industries with above-average risks for employee injury and found that a weak safety climate led to the under-reporting of incidents by over 40%. They noted that under-reporting by two-thirds of the employees stemmed from negative repercussions imposed by management when errors were disclosed. Further research by Brinsfield (2013) and Tynan (2005) showed that high levels of psychological safety diminish employee silence, enabling employees to express greater levels of productive disagreement, candor, and error reporting to leadership. With elevated psychological safety, this research has indicated that employee voice will increase, safety levels will improve, and *ceteris paribus*, organizations will become more effective.

Organizational Learning

Research on psychological safety is fundamentally linked to organizational learning (Edmondson, 1999) through its impact on learning and performance (Newman et al., 2017). Organizational learning involves generating and disseminating organizational knowledge (Nonaka, 1991). The work by Edmondson and Nembhard (2009) and Chandrasekaran and Mishra (2012) emphasized the mediating role of psychological safety in the context of organizational learning. Psychological safety indicates an allowance for taking risks, which enhances the learning behaviors of dynamic and complex teams (Carmeli, 2007). Conversely, Edmondson (1999) observed that individuals may obstruct learning to safeguard resources such as personal reputation. Similar findings have emerged concerning innovation within Research & Development (R&D) teams (Gu et al., 2013), knowledge generation (Choo et al., 2007), and process innovation (Lee et al., 2011).

When examining creative teams, Chandrasekaran and Mishra (2012) argued that performance is influenced by the moderating effects of uncertainty generated while exploring alternatives and the control of project organization. When exploration takes priority, team autonomy levels are high, and authority relationships tend to be weak. A command style can diminish psychological safety by fostering individual isolation and unpredictable interpersonal dynamics (Chandrasekaran & Mishra, 2012). Individual isolation can create microclimates reinforcing "loss spiral" behavior, undermining psychological safety, organizational learning, and creativity among groups. Team members and individuals with higher levels of psychological safety seem to produce more creative solutions through superior organizational performance learning.

The relationship between learning and psychological safety has been examined at both the individual level (Liu et al., 2015) and the group level (e.g., Edmondson, 1999; Bstieler & Hemmert, 2010; Ortega et al., 2010; Roberto, 2002). A team performance and learning meta-analysis identified an indirect mediating effect of psychological safety (Sanner & Bunderson, 2013). Organizational performance, measured by goal attainment and return on assets, is positively associated with employees' collective perception of psychological safety (Baer & Frese, 2003). Across various levels and through numerous studies, psychological safety has been shown to enhance organizational learning and outcomes.

Team Development

Psychological safety is a construct that develops over time through frequent interpersonal interactions (Edmondson, 1999). A longitudinal study on team formation by Schulte et al. (2012) revealed that teams with enhanced psychological safety showed signs of proactive engagement (relationship building) and shared perceptions (assimilation). Their research also indicated that a

sought-after advisor, or "spanner," cultivates and strengthens psychological safety through a repetitive and self-sustaining process. In contrast, individuals who are less sought after may experience lower levels of psychological safety, leading to the formation of subgroups that disengage or compete in hostile manners, ultimately undermining psychological safety within the team.

Psychological safety has been shown to mediate status and speaking up, but this effect is limited to within teams rather than across different teams (Edmondson, 1999, 2003). Bienefeld and Grote (2014) expanded this analysis to include ad hoc teams. Variations among ad hoc teams—such as subgroup homogeneity, cross-group heterogeneity, and homophily concerning status—can result in reduced communication, increased conflict, and heightened biases. These factors may contribute to diminished collective identification, which influences psychological safety. This research indicates that levels of psychological safety may either facilitate or impede team development.

Research into psychological safety as a moderator within the relationship between team tenure and performance challenges the traditional assumption of a positive, linear connection. Established theories indicated a linear positive relationship between tenure and performance (Schulte et al., 2012). Teams with extended tenure develop shared understanding and norms (Kozlowski & Doherty, 1989), while nascent teams often struggle to navigate unfamiliar relationships and work practices (Gibson & Gibbs, 2006). Conversely, Koopman et al. (2016) proposed a curvilinear relationship between average team member performance and the strength of creative psychological safety. Their research argued that new teams experience increased psychological safety as members must adopt a newly formed group identity, emphasizing the team's collective over individual needs to foster respect, trust, and conformity that differs from

that of external groups. In comparison, long-tenure teams have established standardized norms and interaction methods. Koopman et al.'s (2016) research suggested that teams with moderate tenure may face interpersonal conflicts but lack the mechanisms their long-tenure counterparts have to resolve such issues effectively.

Limits to Psychological Safety

Some research indicated that not all activities fostering psychological safety produce positive outcomes. The concept of "escalation of commitment" suggests that individuals may demonstrate cognitive (Staw, 1997) and emotional (Wong & Kwong, 2007) biases, leading to the inefficient use of resources in a failing course of action. O'Neill (2009) argued that these biases might strengthen commitment to suboptimal team decisions when operating under psychological safety and collective responsibility conditions. These findings can be viewed through the lens of "Too Much of a Good Thing," proposed by Pierce & Aguinis (2011), wherein favorable conditions can reach a tipping point, resulting in either marginal utility that leads to resource wastage or adverse consequences.

A recent meta-study investigated the impact of high levels of psychological safety on team and organizational performance to understand its limits better. While the existing literature mentioned earlier documents the positive effects of psychological safety on individuals, teams, and organizations, excessively high levels lead to negative consequences (Eldor et al., 2023). In this study, the authors showed that very high levels of psychological safety adversely affect routine or ordinary task execution, particularly in environments with weak collective accountability. Such elevated levels can create doubt and ambiguity in task performance, diminishing overall effectiveness. In addition to the curvilinear relationships noted above, psychological safety seems to have limits beyond which negative consequences may arise.

Psychological Availability

This sub-section summarizes the origins and antecedents of psychological availability and examines its roles as a mediator and moderator. Considering its personal nature, the research primarily emphasizes conditions at the individual level, with some limited inquiries into group dynamics.

Origin and Historical Context of Psychological Availability

The concept of psychological availability was first introduced in child psychology literature, specifically to describe a mother's psychological presence and engagement with her child (Werkman et al., 1964). This concept persists in contemporary work-family literature, which examines the psychological repercussions of work "spillover," resulting in residual effects on parenting, spousal, and family relationships (Danner-Vlaardingerbroek et al., 2016). In the context of interpersonal relationships, psychological availability pertains to the authenticity of the energy and attention bestowed upon another individual, emanating from within the individual "self."

Like psychological safety, psychological availability is rooted in Kahn's (1990) engagement research and is firmly positioned with an individual's sense of "self." It arises when an individual has "the sense of having the physical, emotional, or psychological resources to personally engage at a particular moment" (Kahn, 1990, p. 714). It is also rendered as a "readiness statistic of how available people are amidst distractions" (Kahn & Heaphy, 2013, p. 89). May et al. (2004) described psychological availability as "the readiness, or confidence, of a person to engage in his/her work role given that individuals are engaged in many other life activities" (pp. 17-18). These definitions align with Kahn's framework, which serves as the foundation for this research.

Antecedent Factors

Recent research has identified antecedents that influence the emergence of psychological availability. Notably, perceptions of stress and feelings of insecurity (Restubog et al., 2011), personal attributes related to energy generation and management (Kahn & Heaphy, 2013), and gratitude (Li et al., 2022) contribute to an individual's perceived availability of resources.

Uncertainty and Stress

Psychological availability diminishes during crises that strain resources (Li et al., 2022), often arising from perceptions of stress (Binyamin & Carmeli, 2010). Stress originates directly from uncertainty (Maslach et al., 2001) and occurs when an individual's well-being is threatened by environmental demands on their resources (Holroyd & Lazarus, 1982). Stress represents a transactional relationship between the individual and the environment, where individuals must determine "what is at stake" and, subsequently, "what can be done about it?" (Lazarus & Folkman, 1984). It involves both a resource allocation process and the potential for resource loss, ultimately affecting psychological availability.

Uncertainty refers to the lack of crucial information needed to achieve an anticipated level of performance, risks associated with future events, or the results of actions (Lawrence & Lorsch, 1967). Clearly defined structures and processes that offer order, stability, and reduced complexity can help alleviate uncertainty and lower stress (Kollenscher et al., 2009). However, overly structured systems emphasizing rigidity and standards can lead to stagnation and inflexibility (Binyamin & Carmeli, 2010). For example, structured Human Resource Management (HRM) processes and standards are tools organizations use to establish clear rules for work processes and performance criteria that align with organizational vision (Becker et al., 2001). Clearly defined and trustworthy HRM practices have been shown to eliminate ambiguity

and reduce levels of uncertainty, resulting in decreased employee stress. These conditions have been found to foster employee creativity (Binyamin & Carmeli, 2010). Clearly defined norms, behaviors, and processes prevent the waste of unnecessary resources and provide employees with a clear source of direction (Binyamin & Carmeli, 2010).

Personal Energy

Individuals continuously navigate decisions regarding the allocation or retention of energy to maintain concentration and avoid distractions amidst competing priorities (Kahn, 1990). Two processes underpin personal resource generation (Kahn & Heaphy, 2013). First, energizing and enervating external interactions involve activities and conditions that can either generate or deplete positive personal energies. Second, emotional relief and depletion outline the limits of an individual's unique emotional range, encompassing energy utilization and replenishment.

Energizing and Enervating Interactions. Energizing and enervating interactions have the potential to either generate or deplete positive energy. These events are external yet foster energies within the individual. Positive energy can be nurtured through play and humor rituals (Roy, 1959), collaborative goal-oriented work (Smith & Berg, 1987), expressions of appreciation and personal value (Kahn, 1993), respectful interaction (Dutton, 2003), trust in leadership (Li & Tan, 2013), and leader coaching efforts (Quinn et al., 2012). Constructive interpersonal interactions help individuals accumulate the personal resources essential for psychological availability.

Interactions involving leadership styles and tactics can lead to energizing and enervating interactions. Employees view leaders as role models to comprehend and respond to crises (Madera & Smith, 2009). Employee resilience is partly developed based on the leadership style

demonstrated during crisis events (Harland et al., 2005). Ramati-Navon et al. (2022) found that inclusive leadership, where leaders and followers mutually influence each other towards personal and collective goals and growth, equips employees with the resources needed to act more autonomously (Stephens & Carmeli, 2017) and to share those positive feelings within the team (Choi et al., 2015). However, inclusive leadership may also reduce psychological availability by imposing greater decision-making demands on employees (Busse & Regender, 2018). The disparity between these two findings might stem from perceived gaps between what employers expect from employees and what employees expect in terms of resources and conduct from their employers; these gaps can differ based on job roles and the organizational mission (Busse & Regender, 2018; Corpanazo & Mitchell 2016).

Empowering leaders actively clarify meaning in the workplace by delegating authority to foster a sense of autonomy and trust among employees, which in turn helps them acquire personal resources (Seibert et al., 2011). Under certain circumstances, even narcissistic leaders can assist employees in gaining or replenishing personal resources by providing clear direction on goals with enthusiasm while addressing potential distractions and adversaries (Li et al., 2022).

Leader behaviors and interactions also impact work-family environments. Family-supportive supervisor behavior (FSSB), such as flexible work schedules and telecommuting, reduces work-family conflict by signaling to employees that they have access to the necessary resources to engage in both work and family roles (Hammer et al., 2011; Bagger & Li, 2014). Conditions of FSSB, particularly discretionary informal agreements that demonstrate the personal engagement of supervisors, lead to greater levels of emotional, intellectual, and physical resources, work-family enrichments, and enhanced thriving at work (Hammer et al., 2011; Mathis et al., 2023). Work-life balance (WLB) has been shown (Russo et al., 2015) to increase

available resources, generating higher levels of psychological availability, which enable individuals to engage in multiple roles successfully. Positive and encouraging leadership behaviors enhance personal resource levels and psychological availability, albeit at different rates based on individual conditions and characteristics.

Alternatively, interactions with bullies (Adams et al., 1997), abusive leaders (Tepper, 2000; Wang et al., 2021), and ultra-competitive co-workers (Fletcher et al., 2008) cause individuals to expend energy on defense rather than expressing their authentic or preferred selves. Adverse residual effects from the workday, such as mood fluctuations, exhaustion, and rumination, deplete resources and diminish psychological availability at home, which may later manifest in the workplace (Danner-Vlaardeingerbroek et al., 2013; Schoellbauer et al., 2023). Ostracism, or the perceived exclusion from others in the workplace, creates stress and anxiety that further reduces psychological availability by consuming or preserving personal resources (Liu et al., 2021). Negative interpersonal interactions deplete resources or force individuals to conserve resources through withdrawal, further diminishing levels of psychological availability.

Emotional Relief and Depletion. The second process is emotional relief and depletion (Kahn & Heaphy, 2013) and refers to an individual's internal ability to accumulate, use, and recover emotional capacity. Kahn (2004) metaphorically likened this to a container that can be filled, used, depleted, and refilled. As individuals experience emotions, their capacity to feel emotions for themselves and others diminishes, potentially leading to depersonalization (Maslach et al., 2001) or an emotional distancing from the authentic self (Kahn, 1993). Examples include roles demanding high emotional effort, such as personal caregivers facing compassion fatigue (Sinclair et al., 2017), where emotions are excessively drained, resulting in withdrawal.

Individuals with strong self-regulation and internal goals are more skilled at managing these conditions as occasional experiences (Kirkegaard Thomsen et al., 2011).

Psychological availability is influenced when resources are depleted by ruminations outside the workplace (Scheollbauer et al., 2023). Ruminations are “a class of conscious thoughts that revolve around a common instrumental theme, and that recur in the absence of immediate environmental demands requiring the thoughts” (Martin & Tesser, 1996; p. 7). Rumination represents a psychological process where thoughts affect an employee's behaviors beyond working hours (Bakker & Demerouti, 2007). Preoccupation arises when an employee fixates on a stressor, causing anxiety, which can lead to extended and repeated conditions (Brosschot et al., 2006). Ruminations turn negative when employees exhibit “preoccupation with and repetitive thoughts focused on negative work experiences” (Frone, 2015; p. 5).

Scheollbauer (2023) found that even positive ruminations deplete personal resources and reduce levels of psychological availability. Individuals with high self-regulation and goal internalization can navigate or effectively handle these situations as non-repetitive experiences (Kirkegaard Thomsen et al., 2011). Daily positive interactions between the workplace and home have been shown to predict women's daily levels of psychological availability (Geldenhuis & Laba, 2018). They found that, while women effectively manage the spillover from home to work, they face more significant challenges with work-to-home spillover due to resource depletion driven by lower confidence levels than men. All forms of rumination consume personal resources that could otherwise be directed toward more positive activities.

Emotional relief can be offered by specific individuals known as toxic handlers, who absorb or address the emotional distress and ruminations of others, effectively redirecting depletion to facilitate recovery, such as leaders and human resource managers (Frost, 2003).

Helping behaviors among coworkers alleviate uncertainty and stress by providing emotional relief (Xiu et al., 2019). Enhancing interpersonal interactions with beneficiaries (Lilius, 2012) can also replenish emotional energy. The ability to manage emotions differs among individuals and is influenced by roles, traits, and interactions with others.

Role of Gratitude

An individual's unique emotional predisposition toward gratitude influences psychological availability. Gratitude has been found to manifest as state (episodic) gratitude or trait (persistent) attitude (Waters, 2012; Fehr et al., 2017). State gratitude is a temporary affective state, whereas trait gratitude is a long-lasting disposition (Fehr et al., 2017). Li et al. (2022) argued that individuals with trait gratitude experience increased psychological availability, particularly in situations of high task significance. They demonstrate more agile thinking and reasoning when confronted with substantial task significance, contributing to the enhanced cognitive resources necessary for psychological availability (May et al., 2004).

Gratitude may also enhance the personal resources of others (Danner-Vlassrdingerbroek, 2016). Trait gratitude, a persistent personality trait, is activated by conditions and cues that promote psychological availability. Trait gratitude is "a generalized tendency to recognize and respond with grateful emotion to the roles of other people's benevolence in the positive experiences and outcomes that one obtains" (McCullough et al., 2002, p. 112). Moreover, trait gratitude is a form of latent personality where individuals "are triggered into actions when situations provide cues for the expression of trait-relevant behavior" (Kim et al., 2013, p. 232). The characteristics of gratitude contribute to the generation, depletion, and temporality of psychological resources at the individual level.

Psychological Availability as a Mediator and Moderator

Psychological availability's mediating and moderating effects have been shown to enhance various personal and organizational outcomes. The following sections explore the mediating and moderating roles of psychological availability across different circumstances and outcomes at the individual, group, and organizational levels.

Engagement

As previously discussed, enhanced psychological conditions, such as psychological availability (Kahn, 1990), establish a foundation for personal engagement. Subsequent research further supported these findings (e.g., May et al., 2004). Similar results have been replicated in various professional settings, including Spanish human resource managers (Beltran-Martin et al., 2023), South African farmers (Asiwe et al., 2017), and petroleum employees (Olivier & Rothman, 2007). Conversely, employees lacking sufficient psychological availability to perform their tasks or roles often experience detachment and isolation in the workplace (Nelson & Sutton, 1990). Newcomers to an organization may discontinue proactive socialization behaviors due to low psychological availability arising from co-worker ostracism (Liu et al., 2021). Although less extensively studied than meaningfulness and safety, the impact of psychological availability on engagement has been explored across various contexts.

Creativity and Innovation

Psychological availability enhances creativity by broadening personal job boundaries (Binyamin & Carmeli, 2010). Due to inherent uncertainty and risk, creative pursuits demand significant resource investment (Adams et al., 2019). Encouraged by greater psychological availability, improvisation can lead to improved creative outcomes (Lei et al., 2022). Improvisation is a distinct form of creativity described as “the process of composing creative

solutions to emergent issues within a short timeframe” (Lei et al., 2022, p. 475). Ren et al. (2022) explored the impact of empowering leadership on fostering employee improvisation amid challenge stress and hindrance stress. Empowering leaders delegate authority and autonomy to employees through coaching, information sharing, and inquiry (Sharma, 2015).

Challenge stress arises when job demands promote growth, learning, and achievement through new and unexpected tasks that employees embrace, often with enthusiasm and curiosity (Lepine, 2005). In contrast, hindrance stress occurs when employees perceive an insurmountable gap between available resources and job demands because of constraining or ambiguous organizational practices, insufficient co-worker support, or job ambiguity (Ren et al., 2022). Challenge stress has been shown to increase engagement, while hindrance stress reduces it (Lepine, 2005). Psychological availability acts as a moderator between empowering leadership and improvisation by enhancing the positive effects of challenge stress and reducing the adverse impacts of hindrance stress (Ren et al., 2022). Improvisation thrives when employees have sufficient resources to dedicate to new and challenging situations without the distractions of competing contextual demands factors.

Similarly, Wang et al. (2021) and Byrne et al. (2016) argued that levels of personal resources influence both individual and collaborative innovation. An employee with a high degree of psychological availability demonstrates greater levels of positive voice behavior (Fan et al., 2022), a constructive action aimed at fostering change and improving the organization (Townsend et al., 2022). Positive voice behavior allows employees to experience personal vitality (energetic positive emotions) and learning emotions (the ability to acquire and utilize knowledge) (Spreitzer et al., 2005).

Psychological availability also mediates interpersonal justice and creativity (Kahn, 2001). Interpersonal justice is a contextual factor in the environment that is generated when leaders treat employees with respect and dignity (Bies & Moag, 1986). Unlike distributive or procedural justice, defined at the organizational level, supervisor-led justice has been shown to encourage and support employees (Khazanchi & Masterson, 2011). Kahn (2001) argued that interpersonal justice alleviates stress, which could otherwise drain resources that might be directed toward creative processes. Groups and organizations benefit from creative and innovative individuals willing to invest personal resources at risk.

Thriving in the Workplace

Thriving employees experience a positive psychological state defined by vitality and a willingness to learn (Spreitzer et al., 2005). They are intrinsically motivated to develop valuable and applicable skills (Kleine et al., 2019). Psychological availability mediates between supervisor-helping behaviors and thriving (Fan et al., 2022). Supervisor helping involves voluntary actions to support supervisees in achieving work goals or preventing failures (Frazier & Tupper, 2016). Supervisor helping consists of voluntary behaviors directed at assisting a supervisee in reaching goals or avoiding setbacks at work (Yue et al., 2017).

Two benefits of supervisor-helping behavior are enhanced cognitive information processing and a positive emotional experience (Bolino & Grant, 2016), both of which are vital for thriving at work (Spreitzer et al., 2005). Zhang (2020) argued that supervisory assistance positively influences employees, making them more inclined to help others achieve organizational goals. Through a study conducted primarily with professionals in the manufacturing and financial sectors over multiple periods, Zhang (2020) discovered that psychological availability moderated the relationship between employees helping and thriving at

work. Thriving employees experienced better health outcomes, reduced burnout, and increased job satisfaction, commitment, task performance, and organizational citizenship behaviors (Kleine et al., 2019). Environments that promote psychological availability foster employee thriving and improve organizational effectiveness outcomes.

Job Performance

Under conditions of psychological availability, employees experience heightened focus, resulting in elevated work performance standards and more ambitious goals (Higgins, 1997). Workers engaged in trust-based relationships with supervisors outperformed their peers regarding job performance factors such as efficiency, judgment, work quantity, and creativity (Li & Tan, 2013). Supervisor-employee relationships entail a "structural asymmetry in power, hierarchy, and status" (Li & Tan, 2013, p. 409). If employees cannot trust their supervisors, this asymmetry induces stress (Whitener et al., 1998), consuming resources that could otherwise be allocated to job tasks. Alternatively, employees exhibit heightened self-confidence and self-awareness under trust conditions, leading to improved focus (Mayer & Gavin, 2005). Enhanced focus and energy conservation translate to improved work performance.

Psychological availability acts as a mediator between job crafting and performance. When employees perceive a lack of resources for completing tasks, they may adjust task boundaries to reduce stress (Harvey et al., 2003) or limit task scope to avoid burnout (Vroom & MacCrimmon, 1968). Job crafting refers to "the physical and cognitive changes individuals make in the tasks or relational boundaries of their work" (Wrzesniewski & Dutton, 2001, p. 179). It involves realigning oneself with the job to enhance goal attainment, lower demands, and promote personal development (Tims et al., 2012). Job crafting increases structural job resources by boosting autonomy and decision-making capabilities, enhances social job resources through peer

support, elevates challenging job demands with added responsibilities, and reduces hindering job demands by lessening cognitive and emotional needs (Tims et al., 2013). Employees modify jobs based on perceived resource availability. The mediating role of psychological availability between job crafting and engagement has been shown in social workers (Meng et al., 2021) and knowledge workers (Singh & Singh, 2018). Proactive and autonomous job crafting increases the resources available for better personal and organizational effectiveness outcomes.

Organizational citizenship behavior (OCB), similar to job crafting, refers to discretionary actions outside formal management systems. Employees initiate these behaviors and are not mandated by management (Smith et al., 1983). Employees who voluntarily take on extra tasks, help colleagues or adhere to organizational rules and norms demonstrate organizational citizenship behaviors. Such informal activities can enhance the efficiency and effectiveness of organizations (Smith et al., 1983). Li et al. (2022) found that employees with abundant resources or psychological availability are more inclined to participate in OCBs, thereby improving organizational performance.

Knowledge Sharing

Psychological availability mediates the relationship between leader behavior and knowledge sharing. Knowledge is a critical asset and is often a source of competitive advantage in knowledge-based economies (Nonaka, 1991). Sharing this knowledge within organizations is vital for fostering creativity and innovation (Nonaka, 1991). Knowledge sharing is a voluntary behavior (Gagné, 2009) that involves both tangible and intangible resource risks (Kim et al., 2016) and is often susceptible to free-rider problems (Cabrera & Cabrera, 2002), making its encouragement a complex endeavor.

Leader coaching can mitigate resource risks (Qian et al., 2020). Coaching behaviors provide frequent interpersonal opportunities for leaders to guide, reassure, and care for employees, fostering positive impacts (Orth et al., 1987; Redshaw, 2000) and facilitating learning and growth (Mink et al., 1993). Through these coaching behaviors, leaders can promote knowledge sharing by helping to generate personal resources (Qian et al., 2020). Employees accumulate emotional, cognitive, and physical resources to support others and create ideas (Binyamin & Carmeli, 2010). A study involving 32 teams from a global logistics company confirmed the mediating role of psychological availability between leader coaching behaviors and knowledge sharing (Qian et al., 2020). Conversely, leader bottom-line behavior, which solely emphasizes profit and performance, constrains opportunities for learning and knowledge sharing, resulting in lower psychological availability (Shi et al., 2024). Employees are more willing to share knowledge when encouraged through leader coaching and less willing when constrained by a bottom-line mentality.

Conceptualization of Resources

The term "resource" in academic research has faced criticism for being ambiguous, inconsistent, and imprecise (Hobfoll, 2002; Lee et al., 2019; Tornbolm & Kazemi, 2012). Early conceptualizations were rooted in economic theory, where the term "commodity," considered synonymous with "resource" at that time, was "defined to mean anything which has usefulness to the possessor and which can be conveyed from person to person" (Brock, 1968, p. 246). Miller and Steinberg (1975) argued that a resource is "any positively perceived physical, economic, or social consequence" (p. 65). The notion of "positively" was questioned by Emerson (1976) when he defined a resource as "an ability, possession, or other attribute of an actor giving him the capacity to reward (or punish) another specific actor" (p. 347). This definition also seemed to

imply some positive action on the part of the first actor at the expense of the second. However, these proposed definitions lacked firm grounding in distinct theoretical frameworks.

Social resource theory (SRT) has offered a series of evolving definitions and situated them within a theoretical framework (Foa, 1971; Foa & Foa, 1976, 1980). SRT defined a resource as "any commodity – material or symbolic – that is transmitted through interpersonal behavior" (Foa & Foa, 1974, p. 36). Later publications defined a resource as "anything that can be transmitted from one person to another" (Foa & Foa, 1976, p. 101) or as "any item, concrete or symbolic, which can become the object of exchange among people" (Foa & Foa, 1980, p.78). Resources were suggested to be classified based on "the meaning assigned to the actions and not a classification of actions" (Foa & Foa, 1974, p. 82). As meaning-making devices, resources are subjective entities shaped by the interplay of social, cultural, interpersonal, power, and value-laden contextual factors (Stets & Cast, 2007; Tornbolm & Kazemi, 2012). Meaning-making is a central tenet of SRT; the structure of resource categories and their interactions during and after exchanges provide insights into their characteristics.

Freese and Burke (1994) further extended the boundaries of a resource to mean "anything that functions to sustain persons and a system of interactions whether or not they are valued, scarce, consumable, possessable, negotiable, leverageable, tangible, or even cognizable" (p. 9). This definition expanded the conceptualization of a resource beyond cognition while still grounded in an exchange system. Hobfoll's (2002) definition segmented resources into two categories as "entities that are either centrally valued in their own right...or act as a means to obtain centrally valued ends" (p. 307). Hobfoll recognized a potential generative relationship among resources, indicating that resources can generate or consume other resources. For instance, knowledge or mastery of a task can lead to money or status. Internal, external,

generative, consumptive, and exchange concepts are intrinsic to this definition. This definition is sufficiently broad to permit variability across contexts and cultures and will serve as the general definition of a resource within this research. However, our understanding of the term resource would benefit from a more detailed examination of its characteristics and contextual use in various settings.

A Taxonomy for Resources

Lee et al. (2019) conducted a structured review of the HRD resource literature related to Kahn's (1990) concept of personal engagement to propose a common understanding of resources. To ground their research, Lee et al. (2019) highlighted an essential distinction between antecedent and resource, often confused or conflated (Shuck et al., 2017). They argued that by using the term antecedent, perhaps even unintentionally, a temporal order is implied in the relationship between events or objects. Alternatively, they draw from Bakker & Demerouti (2007) to define a resource as a general concept without directionality, describing it as a "physical, psychological, social, or organizational characteristic that functions to achieve work goals or reductions on the physiological and psychological cost of work" (Lee et al., 2019, p. 6).

The subjective nature of resources is inherent in the definition provided above. They stated, "This subjective experience is how resources and demands are mean-making devices, which create engagement or foster disengagement by way of their availability or disbursement, perceptions of procedural fairness, or within the conditions of privilege" (Lee et al., 2019). Since this definition is based on the Job Demand-Resources model, which is discussed in more depth later in this paper, the construct was initially limited to the working environment. However, they later defined resource as something that can be "drawn from, drawn on, and/or drawn to" (Lee et al., 2019, p. 6) to generalize beyond the workplace.

A structured review of the literature conducted by Lee et al. (2019) resulted in a taxonomy of five meaning orders of the term "resources." The survey population was based on the keywords "resources," "work engagement," and "employee engagement," as outlined in Kahn's (1990) model for personal engagement. The five categories include a macro-group of organizational resources, meso-groupings of social and job resources, and micro-groupings of home and personal resources. These groups were further divided into sub-categories based on distinctions within the literature. The resource framework for this study is provided in Figure 1.

Organizational resources were defined as "the organizational aspects of a job that are

Figure 1

Resource Framework

Macro	Organizational Resources	<ul style="list-style-type: none"> • Organizational climate and culture • Rewards and recognition • Learning and development opportunity • Policies and services • Leadership
	Social Resources	<ul style="list-style-type: none"> • Supervisor and colleague support • Team support
Meso	Job Resources	<ul style="list-style-type: none"> • Skill variety • Task identity • Autonomy • Feedback
	Home Resources	<ul style="list-style-type: none"> • Family capital • Family support • Family mastery • Work demands and balance • Work-life balance
Micro	Personal Resources	<ul style="list-style-type: none"> • Cognitive • Psychological • Physical • Career

Note: Adapted from Lee et al., 2019

functional in achieving work goals, could reduce job demands and their associated physiological and psychological costs, and, finally, could stimulate personal growth, learning, and development" (Salanova et al., 2005, p.1218). These elements were partially predicated on the Job Demand-Resources (JD-R) model, where organizational resources consisted of organizational climate and culture, rewards and recognition, learning and development opportunities, formal policies and services, and leadership (Lee et al., 2019; Bakker & de Vries, 2021; Demerouti & Bakker, 2001). These resources function on a macro scale, depicting external and shared elements.

Social and job resources represent the mid- or meso-tier grouping of resources (Lee et al., 2019). Social resources are defined as integrating relationships and exchanges among colleagues through communication and task-related assistance (Chang et al., 2013; Simpson, 2010). However, due to the limitations of the Chang et al. (2013) survey on the work environment, Lee et al. (2019) proposed including other social exchanges, such as those with social and personal networks, external consultants, or mentors within this category. Additionally, within the meso-tier level of resources, job resources are those characteristics of the job that have the potential to reduce job demands and their associated costs. Moreover, the job's physical, social, or organizational aspects may qualify as job resources if they contribute to achieving work goals and/or stimulate personal growth, learning, and development (Bakker & Xanthopoulou, 2013, p. 2761). This category is not distinct from organizational and social resources in the JD-R literature. Nonetheless, Lee et al. (2019) created it to isolate resources such as skill variety, task identity, task significance, autonomy, and feedback.

Home resources are generated by and received from family members, contributing to well-being and job performance (Lee et al., 2019). Five subcategories were identified: family

capital, family support, work demand and balance, and work-life balance. Family capital assesses one's external work-life support systems (Thompson et al., 2015). Family support is the extent to which family members provide instrumental and emotional support in addressing problems (Schwarzer & Knoll, 2007). However, given the work environment search criteria, the authors recognized this as an underdeveloped group. In the aftermath of COVID, the work environment continues to change, with boundaries between work and family blurring, placing different demands on employees (Adisa et al., 2022). Despite the relative immaturity of this resource group, it is regarded as a distinct environment that warrants further investigation.

Lastly, personal resources are presented as the most individualized level of resources within the model (Lee et al., 2019). Demerouti et al. (2001) specifically excluded internal resources from the JD-R model due to a lack of general consensus regarding their role and stability in developing job resources. However, Lee et al. (2019) identified four sub-categories of personal resources based on the literature. The first three—cognitive, psychological, and physical—are consistent with, yet broader than, the concept of psychological availability. A fourth resource, career, has been added, encompassing work experiences, seniority, identity, coping mechanisms, and adaptability acquired throughout an individual's career progression (Lee et al., 2019). Personal resources represent a unique and individualized combination of these sub-categories, influenced by a subjective perception of the environment or actions taken (Shuck et al., 2017).

Time as a Resource

Is time a resource absent from this model? Some researchers have suggested that time functions as a resource (Gerson, 1976; Heirich, 1964). Heirich (1964) viewed time as a fixed quantity resource that cannot be regained once it has passed and whose value varies across

cultures and contexts. It can be well spent, wasted, exchanged, or assigned. A manager may give an employee additional time to finish an assignment, or a coach might grant a player more time on the field. In these instances, "specific moments of time acquire a social meaning of their own" (Heirich, 1964, p. 387).

Alternatively, Foa and Foa (1976) view time as a prerequisite for resource exchange since it varies for different resources and is not merely a social construct. More relevant to this research, Heidegger (1982) described temporality as an existential element of what it means to be an authentic Dasein, which is explained more thoroughly in Chapter 3. The temporal dimensions of the future, the have-been past, and the present converge to provide the context for the authentic self to exist and interact. For this research, while time is often euphemistically referred to as a "gift" or something that is "spent," it is regarded as a meta-resource that situates all others and the self within the appropriate context.

The model developed by Lee et al. (2019), based on Kahn's (1990) theory of personal engagement in the workplace, provides a comprehensive and streamlined baseline framework for understanding the concept of resources. Although there are acknowledged limitations of this taxonomy (e.g., its restriction to the workplace, limited examination of home and family contexts, and a focus on JD-R as the primary theoretical framework), this model aimed to define and clarify the role of resources in individual decisions to engage in or avoid potentially risky interpersonal activities. Since the investigation by Lee et al. (2019) was limited to taxonomy construction, it did not explore the underlying theories and mechanisms of exchange. The following section will offer insight into foundational and operational resource theories relevant to this study.

Informing Theories of Resource Exchange

This section examines several major resource theories. Social exchange theory (SET) is reviewed as a general theory for the exchange of resources. Subsequently, three forms of functional resource theory—social resource theory (SRT), job demand-resources (JD-R) theory, and conservation of resources (COR) theory—are surveyed. In line with phenomenological inquiry, these theories are presented to offer insight into research rather than to suggest strict operational theoretical frameworks, which may limit the analysis phase of this study research.

Social Exchange Theory

Before exploring relevant resource theories, a foundation for resource exchange is reviewed through social exchange theory. Interpersonal transactions, or social exchanges, serve as the context for resource exchanges (Foa & Foa, 1980; Tornblom & Kazemi, 2012). They are essential aspects of the working definition of resources utilized in this research. At a basic level, an exchange involves transferring a thing in return for another (Roloff, 1981); however, to qualify as social, it must engage another person (Stafford & Kuiper, 2021). Social exchange encompasses symbolic and intangible properties that arise from and contrast with the economic exchange of material goods (Homans, 1958). Blau (1964) expanded on the social element by arguing that "only social exchange tends to engender feelings of personal obligations, gratitude, and trust; purely economic exchange as such does not" (p. 94). Social exchange theory (SET) posits that interpersonal relationships develop through multiple transactions over time into trusting and mutually beneficial commitments (Cropanzano & Mitchell, 2016). For these exchanges to be repeated and mutually valuable, parties must adhere to norms or rules of exchange (Emerson 1976).

Reciprocity, a norm central to Social Exchange Theory (SET), refers to the repayment of an obligation formed during exchanges (Goulder, 1960). The expectation of reciprocity can take three forms. First, it emerges from a pattern of interdependent exchanges (Gergen, 1969; Molm, 1994) and explicitly excludes direct bargains or negotiations (Molm et al., 2000). Formal negotiations of obligations generate lower levels of trust and commitment than those cultivated through reciprocity norms (Molm et al., 2000; Molm et al., 2009). Second, reciprocity may stem from folk beliefs that develop over time towards a general sense of fairness, where those who do not contribute face punishment, and those who do are rewarded (Goulder, 1960). Lastly, reciprocity can manifest as a norm through cultural obligation. The main distinction between a folk belief and a norm is the philosophical foundation grounded in a sense of duty (Cropanzano & Mitchell, 2016). While this suggests a universal concept, it acknowledges that individuals within and across cultures interpret reciprocity differently. Exchange orientation, or the extent to which an individual keeps track of obligations, varies by person and culture (Clark & Mills, 1979; Shore & Coyle-Shapiro, 2003). Without the norm of reciprocity, exchanges become transactional, hindering the establishment of long-term trusting relationships.

Social Exchange Theory offers a comprehensive theoretical foundation for social and economic exchange processes, the balance of exchanges, the influence of norms, and the cultivation of trust. However, it does not investigate the types of resources exchanged and their effects on individual well-being and interpersonal relationships. The following three subsections explore three such functional resource theories.

Social Resource Theory

Like social exchange theory, Social Resource Theory (SRT) asserts a distinction between economic and social exchanges (Foa & Foa, 1976; Sabbagh & Levy, 2012). SRT advocates a

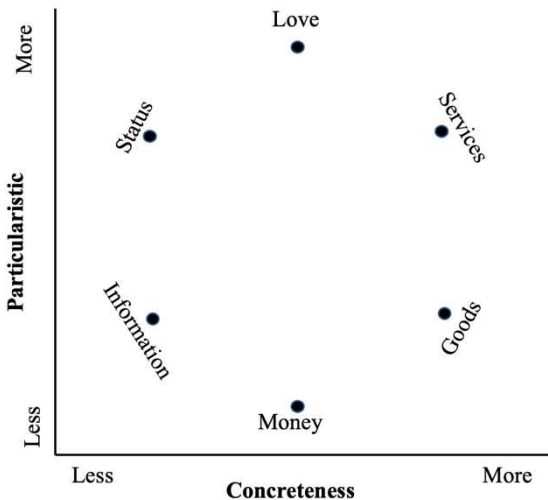
distinct pattern of exchanges between different types of resources based on their similarities and differences (Foa & Foa, 1976). Within SRT, a resource is defined as "anything that can be transmitted from one person to another." There are two primary modes of transmission – giving and taking away (Foa & Foa, 1974). Giving results in "increasing the amount of resources available to the object" (p. 40), while taking away signifies a "decrease in the amount of resources available to the object" (p. 40). Tornblom reinterpreted these modes into delivering, withdrawing, and withholding, where withdrawing refers to a situation in which expected resources are not transmitted, thereby maintaining the status quo (Tornblom, 1988). Both formulations are neutral regarding the "kind" of exchange represented by motives or processes (e.g., freely or begrudgingly; lovingly or rudely).

SRT resources are categorized according to social resource classes based on meaning rather than the type of action. Meaning types are employed to illustrate that "(a) different stimuli may have the same meaning; (b) the same stimulus may have different meanings; (c) response depends on the meaning ascribed to the stimulus" (Foa & Foa, 1974, pp. 16–17). For instance, a hug may symbolize love and acceptance or sadness and farewell. Within SRT, six resource classes are defined based on degrees of similarity and dissimilarity: love, status, information, money, goods, and services (Foa & Foa, 1971; Tornblom & Kazemi, 2012).

A structure for resources class and their relative positionality (i.e., proximal vs. distant) was proposed by Foa & Foa (1971) and is depicted in Figure 2. Sabbagh & Levy (2012) performed a similarity structure analysis (SSA) using the coefficient matrix from Foa & Foa (1974) to render a more accurate relative positioning (Figure 3). SRT's resource classes are distinguished based on degrees of separation across two criteria: concreteness-symbolism and particularistic-universalistic (Foa & Foa 1971). Concreteness is defined by the physical

Figure 2

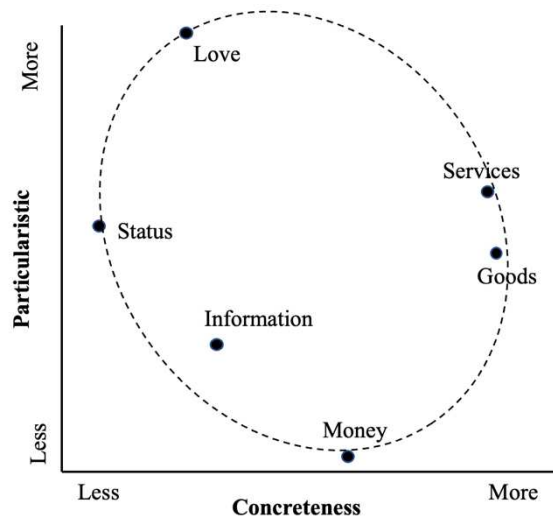
Foa and Fao's Model of Resource Positionality



Note: Adapted from *Societal structures of the mind*, by E. Foa & U. Foa (1974), Charles C. Thomas.

Figure 3

Empirical Circumplex of SRT Coefficients



Note: Adapted from *Toward an expansion of resource exchange theory: A facet approach* by C. Sabbagh and S. Levy (2012), Springer Science+ Business Media

properties of touch and form (e.g., services and goods). Symbolism is characterized by non-verbal expression and meaning-making devices (e.g., status, love). SRT predominantly highlights particularistic versus universalistic attributes to depict the extent to which the exchange is shaped by the specific person (i.e., spouse, friend, or stranger) involved (Foa & Foa, 1976). Love is the most particularistic resource, whereas money is the least. Resources offered by closer relationships (i.e., particularistic) are valued more highly than those provided by distant relationships, regardless of the resource type (Tornblom & Nilsson 1993).

SRT offers multiple propositions to explain the nature and impacts of resource exchange on oneself and others. For instance, giving a resource to another person would yield more of that resource the closer the act is to love, while it would lead to a depletion of resources the closer it is to money. In other words, love generates more love, whereas spending money decreases the available pool by the amount used (Foa & Foa, 1974). Similar proximal resources are favored and exchanged more readily than distant ones. When love is prioritized, reciprocal love is the

most desired, followed by status and services, with money being the least preferred (Foa & Foa, 1974). Universalistic resources, like money, have the widest scope for exchange. In contrast, particularistic resources, such as love and status, require more time to cultivate. While social exchange theory (SET) emphasizes the exchange process, social resource theory (SRT) highlights the types of resources exchanged and their effects on individuals' well-being and interpersonal relationships.

Job Demand-Resource Model

Some of the earliest resource research was conducted after World War II to understand combat personnel's resilience and stress-coping differences (Caplan, 1964; Grinker & Spiegel, 1945). Subsequent studies examined the connection between well-being, health, and stress (Berkman & Syme, 1979; Kelly, 1966; Nuckolls et al., 1972; Sarason, 1974). This line of research concentrated on stress and burnout (Maslach, 1982) in high-stress environments such as social work, healthcare, and education. Maslach and Schaufeli (1993) questioned the idea that only human services settings experience these issues. To support this idea, Demerouti et al. (2001, 2011) developed the job demand-resource model (JD-R) based on the premise that burnout can occur in any occupation where job demands surpass available job resources. The JD-R model suggests that each occupation has unique job stress risk factors influenced by the interplay between job demands and job resources (Bakker & Demerouti 2007).

Stressors are external factors that create a disequilibrium in cognitive, emotional, and environmental systems (Lazarus & Folkman, 1984; McGrath, 1976). In the workplace, job demands serve as stressors, defined as the "physical, social, or organizational aspects of the job that require sustained physical or mental effort and are therefore associated with certain physiological and psychological costs" (Demerouti et al., 2001, p. 501). Examples of job

demands include pressure to perform, a hazardous or harmful physical work environment, and emotionally challenging interactions with customers, colleagues, or clients (Bakker & Demerouti, 2007). Job demands are stressors that incur more significant costs as the intensity of activation or effort increases.

Job resources counterbalance job demands in the JD-R stress model. They refer to the "physical, psychological, social, or organizational aspects of the job that may do any of the following: (a) be functional in achieving work goals; (b) reduce job demands at the associated physiological and psychological costs; or (c) stimulate personal growth and development" (Demerouti et al., 2001, p. 501). Job resources may exist at an organizational level (e.g., coaching, policies), an interpersonal level (e.g., support from teams and colleagues), or a task level (e.g., feedback, clarity, autonomy) (Schaufeli & Bakker, 2004). Job resources are not only necessary to compensate for job demands but are also inherently valuable because they generate and protect other resources, such as personal resources (Bakker & Demerouti, 2007).

The combination of job demands and job resources functions within the context of two main psychological processes: health impairment and motivation (Demerouti & Bakker, 2011). Health impairment is a stress process that arises when employees' mental and physical resources are inadequate to satisfy the requirements of job design or demands, leading to energy depletion to the point of exhaustion or burnout (Demerouti et al., 2001; Schaufeli, 2017). Performance-protection mechanisms, such as attention restriction and task refinement, are initiated to restore balance or minimize costs (Hockey, 1993). Job crafting has been shown to moderate the effects of high job demands (Tims et al., 2010). Research indicates a connection between high job demands and emotional exhaustion, job-related depression, and anxiety (Maslach et al., 2001).

In the second process, sufficient job resources contain or generate motivational potential, which enhances engagement, boosts performance, and reduces cynicism (Bakker & Demerouti, 2007). Resources may foster intrinsic motivation when they promote personal learning and development or satisfy an innate need for autonomy and competence (Demerouti & Bakker, 2011). Job resources, such as performance targets, feedback, and supervisor support, provide extrinsic motivation that drives task absorption and employee commitment (Demerouti & Bakker, 2011). Some studies suggested that only interventions that enhance resources will elevate engagement (Schaufeli, 2017). That research indicated that excessive job demands and insufficient resources contribute to burnout. Increasing job resources boosts engagement, but reducing job demands can lead to less challenging jobs and disengagement (Schaufeli, 2017). Job demands are associated with burnout and reduced engagement, while only job resources are connected to improving engagement.

In the conventional Job Demands-Resources (JD-R) model, resources are primarily confined to job characteristics and the work environment, excluding personal resources. Research on personal resource influence was limited but suggested that personal resources contribute partially to the variance in exhaustion and work engagement at the individual level (Xanthopoulou et al., 2007). Furthermore, additional research (Schaufeli, 2017) posited that personal resources may be more effectively conceptualized as precursors to job demands and job resources, thus underscoring the necessity for further exploration into the appropriate integration of personal resources within the JD-R framework model.

Conservation of Resource Theory

The Conservation of Resources (CoR) theory is the third resource theory reviewed. Hobfoll (1989) proposed this stress theory to understand better the variables and conditions

associated with risky encounters. He described his model as "resource-oriented...based on the supposition that people strive to retain, protect, and build resources and that what is threatening to them is the potential or actual loss of these valuable resources" (1989, p. 531). Hobfoll argued that individuals engage and seek positive reinforcement in the form of resources or, more crucially, aim to avoid the loss of resources. A key component of CoR theory is that individuals work to gain, preserve, and avoid the loss of personal resources.

Hobfoll (1989) divided resources into five categories: objects, conditions, personal characteristics, and energies. Objects physically manifest or are defined by their expense and rarity, such as a home or an automobile. They are linked to socioeconomic status, a factor in stress resistance (Dohrenwend, 1978). Conditions are resources valued and pursued as social constructs, such as seniority, marital status, or social standing. Some scholars (Rook, 1984) argue that conditions as resources require further qualifications; for instance, poor marriages may adversely impact resources. Personal characteristics refer to individual traits or skills that enhance or diminish one's sense of self and generally support stress resistance, including optimism, gratitude, or a sense of control. Finally, energies encompass skills and abilities that can be exchanged for other resources like time, money, and knowledge. Energies are distinct in that they are typically not valued for their intrinsic worth but rather for their capacity to secure other types of resources. Each resource category is thought to possess an internal instrumental value for the holder and a symbolic value that illustrates the holder's identity to others (Hobfoll, 1989). These five resource categories can be utilized individually or in combination. They closely resemble the groups proposed by Kahn (1990) but include the addition of energies. This framework also corresponds with the micro- and meso-levels of resources in Lee et al.'s (2019) taxonomy.

A criticism of Hobfoll's definition of resources is that nearly anything can be considered a resource, which may lead to ambiguity and not produce rigorous findings. Additionally, emphasizing "value" implies only a positive outcome from the exchange. In contrast, research indicated that adverse outcomes could arise from beneficial aspects; for instance, high work engagement can create conflicts with family (Halbesleben et al., 2009). Moreover, the categorization of a resource does not inherently define its nature. As a result, Halbesleben et al. (2014) proposed a refined definition of a resource as "anything perceived by the individual to help attain his or her goals" (p. 5). This definition highlights an individual's perception of how a resource aids in achieving their goals, regardless of the success of that achievement.

The CoR theory proposes that individuals are motivated to protect their current resources and seek to acquire new ones by adhering to two core tenets: protection and investment (Hobfoll, 1989). First, Hobfoll (1989) and others (e.g., Lee & Ashford, 1996) argued that resource loss is a central motivational tenet mediating engagement risk, suggesting that the potential for loss may be perceived as more harmful than actual loss or the reacquisition of resources that were previously lost. This principle is supported by research on loss aversion, which posits that the utility function for risk decisions is steeper for losses than for gains (Kahneman & Tversky, 1979; Tversky & Kahneman, 1992). Therefore, the CoR theory highlights the significant impact of perceived resource loss on risk aversion and decision-making processes.

The second tenet of CoR asserts that individuals invest in resources to guard against future losses, to recover what was previously lost, or to acquire new resources (Hobfoll, 1989; Halbesleben et al., 2009; Ng & Feldman, 2012). Halbesleben (2014) identified corollary precepts such as (1) individuals with more resources are in a better position to acquire even more resources and vice versa, (2) initial resource losses or gains lead to subsequent losses or gains,

respectively, and (3) diminished resources may prompt defensive strategies aimed at preserving unspent resources. Resource gain or loss is a primary motivator when deciding whether to engage in interpersonal risk.

Halbesleben et al. (2014) further elaborated on the consequences of resource loss by arguing that individuals who have lost or have fewer resources are more likely to continue experiencing loss. The ongoing depletion of resources, or loss spiral (Hobfoll, 1989), whether real or perceived, may prompt defensive actions to preserve remaining resources. In the context of healthcare, Alvaro et al. (2010) suggested that constant threats to resources can lead to employee burnout and negatively impact job performance. Similar results have been observed in other professional environments, such as in correctional officers (Neveu, 2007), education (Alarcon et al., 2011), and nursing (Prapanjaroensin et al., 2017). Resource loss can create a detrimental spiral, triggering defensive behaviors and ultimately resulting in burnout and diminished job performance across various professions and career environments.

CoR theory suggests that individuals are driven to safeguard their existing resources while investing in acquiring new ones to prevent adverse outcomes. It investigates how people react to risky situations and underscores the importance of resources in shaping psychological well-being, engagement, and performance. CoR theory has been utilized across various domains to comprehend stress, coping mechanisms, and the influence of resource dynamics on individuals' overall functioning when facing decisions laden with interpersonal risk.

Conclusion to Review of Literature

This literature review provides a foundation for exploring the unexplored dynamics between resources, psychological safety, and psychological availability. Although significant research was devoted to examining psychological safety, less emphasis was placed on

psychological availability. The relationship between these phenomena and resources remains underexplored, particularly when examined through qualitative methodologies. This gap presents an opportunity to investigate the complex cognitive, emotional, and contextual dimensions that influence an individual's decision “at the moment” to allocate resources when facing interpersonal risks. Examining these phenomena through qualitative inquiry addresses a gap in the existing literature. It aims to provide new and valuable insights that enhance quantitative and qualitative research methodologies in the Human Resource Development (HRD) field.

CHAPTER THREE: RESEARCH METHOD

This chapter outlines the research method used to investigate an individual's experience making interpersonal risk decisions within group contexts. It begins by justifying a qualitative research design based on a social constructivist epistemology. Subsequently, the chapter details the selected research method, Interpretative Phenomenological Analysis (IPA). Next, methodological considerations are presented, including researcher positioning, sample size, and data analysis procedures. Quality criteria, including multiple attributes of trustworthiness, are examined to ensure the study contributes to rigorous research. Finally, the study's limitations and delimitations are outlined to define the scope and analytic boundaries of the study research.

Research Design

This study seeks to understand better how individuals experience decisions involving interpersonal risk in group interactions. These human experiences exist as intentional acts of consciousness in relation to objects, in this case, other team or organization members (Husserl, 2002). These conscious individuals are primarily distinct from material nature due to their capacities for consciousness, perception, reflexivity, and intentionality (Lincoln & Guba, 1985). Consequently, methodologies designed for the physical sciences were not deemed suitable for exploring the targeted human experiences, necessitating an alternative approach aligned with the social sciences domain (Wertz, 2011). To achieve this, the study adopted an interpretative or hermeneutical phenomenological approach rooted in a social constructivist epistemological framework. This approach was selected to explore the profound meanings embedded in the participants' lived experiences. This section explains the rationale behind the methodological choice and outlines the procedures for data collection, interpretation, and dissemination of the research findings.

Epistemological Foundation

Most extant research on psychological safety and psychological availability utilized quantitative methodologies. That research, which depends on standardized survey procedures and established statistical techniques, was inherently aligned with a post-positivist perspective on the studied phenomena and assumes a level of predictability and measurability inherent in human behaviors and responses. However, Newman et al. (2017) advocated for a more nuanced exploration of the phenomena in question, emphasizing the need for methodologies that examine these concepts' experiential and subjective aspects. Consequently, this study proposes a phenomenological approach to uncover a deeper and more contextualized understanding of the phenomenon.

It should be noted that the primary purpose of phenomenology is not to enhance our empirical understanding of phenomena but to investigate the foundation of this knowledge further and clarify how it can occur in the first place (Zahavi, 2018). The essence of a phenomenological study lies in its ability to reveal and interpret an individual's experience as it is authentically constructed and perceived, accommodating the various modes of appearance that manifest differently across different perspectives, even within a single individual (Bevan, 2014). This focus on the sense-making and constructive processes at the individual level aligns best with a social constructivist approach to epistemology.

Social constructivism places the individual at the center of experience. It adopts an epistemological stance in which individuals shape their concept of reality through interaction with their environment. "Social reality is a construct based on the actor's frame of reference within the setting" (Lincoln & Guba, 1985, p. 80). The constructivist approach embraces a subjectivist perspective rooted in an individual's prior knowledge and experiences, which are, in

turn, influenced by factors such as race, gender, social status, cultural norms, and societal values (Lincoln & Guba, 2013). Similarly, Heidegger's phenomenology rejects the Cartesian dichotomy of mind and body, asserting that there is no detached, purely intellectual perspective of a phenomenon. Instead, it proposes an inherently positional understanding of phenomena, avoiding a third-person perspective from nowhere and, instead, championing an embodied first-person viewpoint (Zahavi 2018).

As a methodological approach, phenomenology acknowledges the subjective interplay between researchers and participants in co-creating findings (Lincoln et al., 2018). The methods employed within this paradigm recognize the vital contributions of both parties to the research process. This recognition underscores the compatibility of constructivism with phenomenology, which provides both a method for investigation and a philosophical framework for understanding and interpreting meaning. The emphasis on the subjective, embedded first-person perspective is central to phenomenological inquiry.

Maintaining a coherent alignment between the research question and the chosen methodological approach is imperative for producing high-quality academic research. As mentioned earlier, the phenomenon of interest has primarily been studied using quantitative methods, which focused on the "what" of relationships. There is a lack of qualitative exploration into the "why" and "how" aspects of these relationships. A restatement of the primary research question is warranted when discussing the best method for this study: *How do individuals understand the lived experience and meaning ascribed to their decisions to put their resources at risk within a group setting?* Since this research question aims to develop an understanding of the meaning of these lived experiences through interpretation (Van Manen, 2016), a hermeneutic or

interpretive phenomenology, specifically Smith's (1996) Interpretative Phenomenological Analysis (IPA), is proposed.

Interpretative Phenomenological Analysis (IPA)

The term Interpretative Phenomenological Analysis (IPA) was initially introduced by Smith (1996) in health psychology. Smith and Osborn (2015) noted that "IPA is a suitable approach when one is trying to find out how individuals are perceiving the particular situations they are facing, how they are making sense of their personal and social world" (p. 26). IPA employs a double hermeneutic concerning the researcher's interpretative stance, which requires being both "empathic" and "critical" (Smith & Eatough, 2007). The empathic aspect involves the researcher striving to grasp the participant's perspective fully. In contrast, the critical aspect entails the researcher posing inquisitive and analytical questions about the participant's narrative, aiming to highlight aspects the participant might have overlooked. These interpretive approaches aim to achieve a deeper and more precise analysis of the individual. Arguably, this research proposes a triple hermeneutic by effectively presenting the inquiry results throughout this dissertation. IPA is based on three key concepts in knowledge theory, or epistemology: phenomenology, hermeneutics, and idiography. The following sub-sections explore each of these principles.

Philosophy of Phenomenology

It has been suggested that phenomenology aims to investigate the "domain of the ignored obvious" by revealing pre-reflective descriptions or interpretations of a phenomenon (Zahavi, 2018, p. 103). In phenomenology, the term phenomenon carries a specific meaning. Moran and Mooney (2002) define the phenomenon as "all forms appearing, showing, manifesting, making evident or evidencing, bearing witness, truth-claiming, checking, verifying, including all forms

of seeming, dissembling, occluding, obscuring, denying, and falsifying.” (p. 5). While acknowledging the breadth of this list, Vagle (2018) advocated for a more focused perspective, highlighting manifesting and appearing as the primary attributes. Depending on the type of phenomenological research, descriptive or interpretative, the investigation seeks to identify and isolate the essence or meaning of phenomena as manifest within the individual.

While certain aspects of phenomenological inquiry may date back to earlier eras (Smith, 2016), it was Husserl who, drawing on Brentano's descriptive psychology and responding to Descartes's mind-body dualism, established the modern framework of Western phenomenology (Vagle, 2018). Husserl proposed that consciousness is always in relation to or intentionally engaged with objects, aiming to integrate what Descartes had separated—the objective and the subjective (Vagle, 2018). For a phenomenological philosopher, intentionality extends beyond a common understanding, emphasizing directionality toward a goal. It assumes a generic term with broader implications for “pointing-beyond-itself proper to consciousness” (Zahavi, 2018, p.16). In this sense, consciousness is focused on objects that are inherently and essentially separate and distinct from consciousness itself, where those objects are always approached from a perspective unique to that experience.

According to Husserl (1983), phenomena are not confined to a separate realm of the mind or inexplicable external forces; instead, they are experienced in the everyday routines of life within the natural realm, or “lifeworld.” Husserl advised researchers to go “back to the things themselves, to consult them in their self-givenness and to set aside all prejudices alien to them” (Husserl, 1983, p. 35). Marion (2002) contended that phenomenology fundamentally concerns how entities reveal or present themselves unhindered by predetermined or constructed meanings. By suspending natural or everyday pre-theoretical assumptions, Husserl's philosophy aimed to

explore the morphological essences of lived experiences (*erlebniswesen*) without theorizing, interpreting, or explaining (Van Manen, 2014). Husserl (1931) characterized this integrated philosophy and methodology as transcendental phenomenology, or, in the terminology of later scholars, descriptive phenomenology (e.g., Colaizzi, 1978; Giorgi, 2010; Moustakas, 1994). Husserl's descriptive phenomenology is steadfastly committed to understanding the epistemological nature of phenomena by generating rich and intricate descriptions derived from meaning units relevant to the participant (Giorgi, 1985), purposefully avoiding imposing the researcher's interpretations on others' lived experiences.

Hermeneutics

Later, Heidegger, one of Husserl's most distinguished pupils, steered phenomenology toward an ontological orientation (Zahavi, 2018). His interpretative or hermeneutic phenomenology viewed the mind and world as inherently interconnected and inextricably linked entities. Thus, consciousness and experience can only be genuinely understood by virtue of being human and as an act "being-in-the-world," or as Heidegger termed it, *Dasein* (Heidegger, 2010). This relationship between self and existence in the world characterized Heidegger's phenomenology as fundamentally ontological, where "objects are constituted as correlates of consciousness" (Heidegger, 1982, p. 21). In this sense, his phenomenology is neither realist nor anti-realist but is a system in which the self is necessarily and simultaneously positioned within and of the world.

Heidegger suggested that the role of phenomenologists was to uncover or reveal phenomena to make them visible, using interpretation or hermeneutics as the primary method for this uncovering (Heidegger, 1982). Hermeneutics is a dialectical method that engages in a compare-and-contrast dialogue of individual understandings to mediate differences through

rational discourse and analysis to achieve consensus (Guba, 1990). For Heidegger, interpretations developed through the crucible of hermeneutics formed the fundamental way of knowing. Following Heidegger, Gadamer (2008) expanded on the hermeneutical circle as a process of continuous interpretation within the context of experience, arguing that no interpretation could be deemed entirely unbiased. Through this dialectical and intersubjective approach, researchers aim to clarify the ambiguities of a participant's experience (Van Manen 2014).

Consistent with hermeneutics, Interpretative Phenomenological Analysis (IPA) is not a linear process of positing and testing but rather an interactive process that moves dynamically between the part and the whole. Additionally, while strict transcendental phenomenology approaches an experience pre-theoretically, IPA permits engagement within existing theoretical models through secondary questions during the interpretation stage of analysis (Beck 2021).

Idiography

Idiography lies at the heart of the methodological framework of Interpretative Phenomenological Analysis (IPA). The primary objective of IPA is to carry out a thorough and individualized exploration of a person's lived experience (Smith et al., 2022), which naturally aligns with idiographic inquiry. Initially developed by psychologist G. W. Allport (1962), idiography stands alongside conventional nomothetic methods that dominate post/positivist research, which often aim to generalize findings based on established standards of reliability and validity. However, such nomothetic approaches have been criticized for producing “indeterministic statistical zones that construct people who never were and never could be” (Datan et al., 1987, p. 156). Idiographic methods provide rich and supplemental data essential for

a comprehensive understanding of a phenomenon by enhancing its dimensionality without displacing the nomothetic approach.

IPA employs individual case studies to test or reveal unknown facets of existing theories (Campbell, 1975; Smith et al., 2022). The idiographic analysis involves a “detailed examination of particular cases, in understanding how particular people have experienced particular events. It does not eschew generalizations but works painstakingly from individual cases very cautiously to more general claims” (Smith & Osborn, 2015, p. 27). This method appreciates the unique aspects of individuals, as expressed through personality traits, self-concept perceptions, social history, experiences, and cultural values. In summary, idiography aligns well with the social constructivist epistemology assumed in this research.

Critiques of IPA

Notwithstanding its growing adoption as a method, IPA has been criticized and debated, particularly among scholars such as Giorgi (2010) and Van Manen (2017). Giorgi (2010) criticized IPA for lacking scientific rigor and replicability and failing to adequately bridge the gap between continental phenomenological philosophy and phenomenological psychology. Similarly, Van Manen (2017) questioned whether IPA represents an authentic school of continental phenomenological thought philosophy.

Giorgi (2010) contended that to satisfy the conditions of scientific rigor and credibility, a research method must meet the criterion of objectivity, characterized by intersubjective verifiability and replicability. He critiqued Smith and Osborn (2008) for not presenting IPA as a “prescriptive methodology,” which left it vulnerable to the “personal processes” of the researcher (p. 67). Giorgi (2010) argued that this lack of rigor undermined the replicability and validity of any findings, thus labeling IPA as “poor science” (p. 5). In response, Smith (2011) contended

that Giorgi's criticisms were based on a limited selection of published research rather than the growing corpus of IPA studies. Furthermore, Giorgi's critique proposed a very narrow view of good science that could disqualify many types of qualitative research. Like other forms of qualitative inquiry, IPA aims to reveal profound and richer understandings rather than generate generalizable data (Glense, 2016). Both approaches contribute to the body of knowledge but in different ways. Following the publication of Giorgi's (2010) critique, Smith et al. (2022) further refined IPA's methodological rigor, incorporating revisions to analytical frameworks and quality criteria relevant to its method. IPA seeks to yield profound insights through a disciplined approach to data collection and analysis through an inherently hermeneutic approach.

Van Manen (2017), similar to Giorgi (2010), criticized Smith for not adequately bridging phenomenological traditions. Van Manen argued that while IPA employs phenomenological terms like "lived experience" and "intentionality," it diverges from true phenomenological philosophy and aligns more closely with psychological phenomenology. Smith (2018) countered the notion of a singular form of phenomenology, asserting that IPA combines phenomenological and psychological approaches. Zahavi (2019) supported this perspective, referencing research that effectively merged phenomenological philosophy with psychological insights to deepen our understanding of complex phenomena such as schizophrenia (Møller et al., 2011).

Furthermore, Van Manen (2017) critiqued IPA for shifting the analytical focus from the phenomenon itself to the participant's personal experience, diverging from the traditional use of epoché-reduction and positioning the researcher as a "co-analyst" in the interpretive process (p. 777). In line with Heidegger's (1982) immersive approach to understanding experience, Smith (2017) refuted this by claiming that the inherent self-reflective nature of humans should not restrict phenomenological analysis to a pre-reflective state through epoché and reduction. In

defense of IPA, Zahavi (2019) argued for the researcher's "constitutive contribution" (p. 903) to the inquiry and meaning-making process. He argued that IPA aims to provide a comprehensive and integrated perspective of phenomena by incorporating reflective and pre-reflective narratives. Zahavi (2019) proposed that a purely descriptive phenomenological approach based solely on a strict application of epoché-reduction, such as that advocated by Giorgi, might result in only superficial understandings—what Spiegelberg (1965) called “picture-book” comprehensions (p. 170) of phenomena—without offering the depth of insight that true phenomenologists seek.

Lastly, Van Manen (2017) distinguished between qualitative research that employs phenomenological concepts and rigorous phenomenology, which explores the primordial and pre-reflective meanings of experience. Qualitative research that relies solely on thematic analysis falls short of phenomenology's aims, which regard themes as stepping stones toward "fully fledged reflective texts that induce the reader into a wondering engagement... that help the reader recognize the meaningfulness of certain human experiences" (Van Manen, 2017, p. 777). In response, Smith (2017) contended that Van Manen used poor, rather than potentially good, examples to evaluate the applicability of the IPA method. Smith (2017) argued that superficial thematic analysis does not represent a potentially good study fit for publication. IPA research must focus on the primordial experience and provide rich, insightful, reflective analysis to bridge the transcendental and psychological gap. Criteria for conducting, analyzing, and documenting robust IPA research proposed by Smith and others are outlined in future sub-sections.

Role of the Researcher

The role of the researcher in IPA is to construct and navigate the previously mentioned double hermeneutic. Smith (2004) and Larkin et al. (2006) proposed that IPA can straddle

Ricoeur's (1970) distinction between a hermeneutics of empathy and a hermeneutics of suspicion. A hermeneutic based on empathy seeks to recreate a primordial experience, while one grounded in suspicion approaches that experience from the outside, potentially influenced by pre-existing theoretical models. IPA aims for a middle ground where the researcher adopts an insider perspective (Conrad, 1987) to comprehend the experience from the individual's viewpoint and to question and test that experience from an external perspective through interpretation (Smith et al., 2022). The specific methods for managing the processes of phenomenological reduction and epoché and techniques for addressing researcher bias are discussed next.

Reduction and Epoché

An essential aspect of all phenomenological inquiry is understanding intentionality. Intentionality is defined as “the inseparable connectedness between subjects (that is, human beings) and objects (that is, all other things, animate and inanimate, and ideas) in the world” (Vagle, 2018, p.27). Phenomenologists maintain that consciousness is invariably directed toward something (Sokolowski, 2000; Zahavi, 2018). For Husserl, phenomenological inquiry represents a quest for morphological essences that define the intentional relationships between subjects (Husserl, 1983). These essences are proximate and essentially vague, especially compared to the definitive clarity sought in positivist scientific research. Conversely, Heidegger's phenomenology emphasizes a construct of "being-in-world" and investigates how intentional interactions manifest and are subject to individuals' ongoing interpretation (Zahavi, 2018). Phenomenologists seek the pre-reflective essence of experiences, but there is ongoing debate about the best approach to positioning inquiry for attaining these insights.

Husserl, Heidegger, and other phenomenologists offered various perspectives on the methodologies and philosophies necessary to explore lived experience. They differed in their approaches to suspending the "taken-for-grantedness" to uncover the underlying meaning structures of these experiences. Husserl (1983) proposed a two-step method to transcend our everyday attitudes. First, the researcher intentionally and systematically sets aside preconceptions about the phenomenon in a process known as epoché or bracketing (Van Manen, 2018). It is essential to recognize that the purpose of epoché is not to make reality disappear but to suspend rigid, dogmatic, and limiting preconceptions so that reality can be genuinely accessible to the researcher for study (Husserl, 1970; Zahavi, 2018). Bracketing enables the researcher to re-approach the phenomenon unencumbered through a second step, the reduction process.

The process of reduction is considered "the basic method of Husserlian phenomenological philosophy," and without it, it is (arguably) not phenomenology (Fink, 1970, p. 72). Reduction serves as a means by which we can observe the phenomenon as it is presented and emerges from experience (Van Manen, 2018). Merleau-Ponty (1962) describes reduction as an act that allows one to see "the forms of transcendence fly up like sparks from a fire; it slackens the intentional threads which attach us to the world and thus brings them to our notices" (p. xiii). This experience is also characterized as a sense of wonder, where things reveal themselves to us as they truly are. By transcending the natural attitude through achieving a phenomenological state, the researcher is prepared to observe and document the essence of the experience.

Heidegger adapted the concepts of epoché and reduction to suit his hermeneutic framework. While Husserl sought an invariant or eidetic understanding, Heidegger aimed to

reveal the modes of being from within the world itself (Van Manen, 2018). He argued against bracketing the world, advocating for its incorporation into the ontological fabric of “being-in-the-world.” The goal of reduction in a hermeneutic context is to “extract phenomenological sensibilities” through an ongoing critical examination of assumptions and preconceptions rather than distilling a phenomenon to its purest form (Van Manen, 2014, p. 226). The epoché-reduction process strives to awaken the researcher to the phenomenon.

Recent scholars like Dahlberg have promoted a more active interpretation of the epoché-reduction practice. Drawing from Merleau-Ponty’s (1968) concept of the “flesh of the world” concerning researcher positionality, Dahlberg et al. (2008) introduced the “bridling” method. Bridling involves the researcher temporarily setting aside their natural attitudes to adopt a reflective, dynamic lifeworld perspective. This method likens the researcher's role to that of a horse rider, who must continuously adjust the reins for guidance, symbolizing a collaborative process that acknowledges the contributions of both researcher and subject. Dahlberg et al. (2008) identified three aspects of bridling: (1) the restraint of pre-understandings; (2) a focus on the entire event rather than solely on preconceptions; and (3) a forward-looking approach that emphasizes circumspection and contemplation in contrast to the retrospective nature of bracketing. While this approach does not belong to the original Husserlian school, it is commonly utilized in reflective lifeworld research and is increasingly applied in interpretative phenomenological research (Vagle 2018).

IPA acknowledges the legacy of Husserl’s psychological phenomenology by emphasizing an individual’s subjective perception of experiences rather than objectively portraying those experiences as mere objects (Zahavi, 2018). It aligns with Heidegger's emphasis on interpreting meaning as the principal structure of consciousness instead of merely describing

pre-reflective experiences (Smith et al., 2022). This task is further nuanced by the researchers' preconceptions and understandings, which, rather than being set aside, play a crucial role in interpreting another's experience (Beck, 2021; Smith et al., 2022). In this context, the "bridling" method effectively represents the reductive process of IPA and was utilized in this research.

Researcher Perspective

Research is inherently influenced by the philosophical frameworks that researchers bring to their studies, including their ontological, epistemological, and methodological choices and assumptions (Lincoln et al., 2018). Within the constructivist paradigm and phenomenological methodology, recognizing my role as a researcher and a participant in the investigation was important and necessary (Moustakas, 1990; Lincoln & Guba, 2013). Researcher reflexivity involves continually examining “how one's positionality, perspectives, backgrounds, and insights affect every aspect of a study” (Vagle, 2018, p. 14). Since the role of the researcher was crucial to the fundamental double hermeneutic elements of IPA (Smith et al., 2022), this author must disclose, describe, and position oneself within the proposed research.

The design and execution of this study were significantly influenced by my personal experiences with interpersonal risk-taking across various group dynamics within multiple organizations over three decades. As I approach the latter stages of my professional career in Information Technology (IT) at a large healthcare company, I fulfill various roles as a leader, team member, and individual contributor, all directed toward achieving the company's objectives. These goals often involve initiating and overseeing complex projects within diverse organizational structures. With extensive professional experience across different levels of the organization, I am well-prepared to understand the intricacies of the roles, contexts, and structures relevant to the experiences of late-stage IT professionals. Nonetheless, I remain aware

of the potential impact of personal bias, and I utilized specific methods and techniques to ensure the quality and rigor of the study. These methods are detailed later in this study. Additionally, while my practical experience fuels my interest in this research topic, the research design and analysis are firmly grounded in a comprehensive exploration of existing literature and theoretical frameworks.

Data Source and Sample Selection

The following section details the data collection and analytical processes for this study. It begins by outlining participant selection methods, criteria, and rationale for these choices. Procedures for collecting and safeguarding confidential participant information are outlined, including identifying and mitigating potential risks and benefits associated with the study. The research setting and design are described, followed by an explanation of the data analysis and synthesis methods. Criteria and methods are presented to ensure the trustworthiness of data, analysis, and findings. Finally, the limitations and delimitations of the study are outlined to contextualize and frame the research outcomes appropriately.

Participant Selection

Participants for this study were selected based on their knowledge and experience (Creswell, 2013), their availability to participate, and their willingness and ability to communicate relevant experiences and opinions (Bernard, 2002) about the phenomenon in question. Mixed purposeful sampling (Patton, 2014), which combined homogeneous, typical case, and snowball sampling strategies, facilitated the triangulation of datasets and findings, thereby enhancing the quality of the research (Suri, 2011). Purposeful samples are described as "information-rich cases" that provide comprehensive and detailed descriptions of a phenomenon from the subject's perspective and are commonly utilized in qualitative research (Patton, 2014).

Candidates were initially identified through professional social media platforms (e.g., LinkedIn) and the author's professional networks and memberships (e.g., Gartner). A solicitation email was sent to potential candidates using the template provided in Appendix A.

Smith (2016, 2022) recommended selecting a homogeneous sample to enable an in-depth analysis of the similarities and differences among subjects. The criteria for homogeneity were primarily determined by the research scope and the phenomenon's rarity (Smith et al., 2022). While evaluations of interpersonal risk in group settings are relatively common, this study intentionally chose a specific cohort of candidates (typical case) to explore diverse and overlapping experiences. These candidates were drawn from a pool of late-stage career professionals within the general Information Technology (IT) sector. For this study, late-stage career professionals refer to those aged between 50 and 60 who have been employed in the IT industry for at least five years without being limited to any single company or organizational model.

This particular demographic was chosen for three reasons. First, this theoretical construct hypothesizes that younger generations may make resource-based decisions prioritizing the potential attainment or loss of future resources over the loss of already acquired resources (Hobfoll, 2002; Halbesleben, 2014). The primary distinction lies in the contrast between actualized resources and prospective resources. Given the existing research on the drive for resource conservation (Hobfoll, 2002), this population may experience different meanings in these situations. Second, individuals over 60 may be closer to leaving the workforce and more capable of bridging resource gaps. This revealed differential meanings compared to those of younger populations. While all age groups confront complex resource decisions within their careers, concentrating on this demographic provided more complex and differentiating insights.

Lastly, the pressure for firms to innovate and for employees to stay current may reveal unique aspects of the phenomenon being investigated. Notably, many of the largest commercial IT firms are relatively young, with only a few, like HP, Walt Disney, and IBM, having been around for over fifty years (McCarthy & Richter, 2021). Most current IT companies emerged after these professionals entered the workforce. According to the U.S. Bureau of Labor Statistics, the median age of IT professionals ranges from 34.6 years in internet publishing firms to 44.4 years in telecommunications firms (U.S. Bureau of Labor Statistics, 2022), placing late-stage career professionals outside the average. Emerging technologies, such as artificial intelligence, blockchain/non-fungible tokens, and metaverse virtual realities, are being developed faster (Davis & Olliffe, 2022), increasing demand for aging professionals to maintain or advance their skills. As the final criterion for this group, late-stage career professionals may face differing decisions regarding how to remain relevant, gain or retain resources, or engage in the collective objectives of innovation processes.

IPA's modest, homogeneous sample size aims to provide the deep and rich insights sought in qualitative research (Smith et al., 2022). While IPA research often concentrates on a small number of individuals, typically between two and six, Smith et al. (2022) recommended that a sample size of around ten participants is appropriate for dissertation research. This recommendation is consistent with other studies that have indicated a sample of about twelve participants usually achieves saturation in qualitative interviews (Francis et al., 2010; Guest et al., 2006). To avoid early data saturation and to ensure a wide range of experiences, snowball sampling was employed (Patton, 2014; Glense, 2016) to include diverse demographic characteristics, such as gender, education, race, and employment levels.

Twelve individuals were interviewed in total. Two pilot interviews were conducted; however, they were excluded from the final analysis. While these interviews helped refine the interview process and questioning techniques, some aspects of their examples diverged from the research objectives. The remaining ten individuals were interviewed following the research design described later in this chapter. Demographic data for each participant is summarized below in Table 1. Participant eligibility was confirmed during the first of three interviews using the protocol outlined in Appendix B.

Pseudonyms were assigned to maintain the anonymity and confidentiality of all data collected during the interviews. Due to the self-identified heritage and cultural references made in some interviews, common Western names were selected to prevent the potential identification of candidates based on distinct characteristics. Efforts were made to ensure a balanced distribution of gender, role level, and education level while maintaining the homogeneity required by the IPA methodology. Role levels were categorized into three groups: (a) individual

Table 1

Participant Demographic Data

Pseudonym	Age	Gender	Time in IT	Time in Org	Role Level	Education
David	58	Male	>20 yrs	> 5 yrs	Individual	Masters
Adam	56	Male	>20 yrs	> 5 yrs	Executive	Masters
Bob	53	Male	>20 yrs	> 5 yrs	Individual	Some College
George	55	Male	>20 yrs	> 5 yrs	Management	Some College
Mathew	60	Male	5-10 yrs	> 5 yrs	Executive	Masters
Richard	54	Male	>20 yrs	> 5 yrs	Individual	Masters
Stacey	54	Female	5-10 yrs	> 5 yrs	Management	Masters
Michael	56	Male	>20 yrs	> 5 yrs	Executive	Masters
Anna	53	Female	>20 yrs	> 5 yrs	Executive	Masters
Rachel	58	Female	>20 yrs	> 5 yrs	Individual	Some College

contributors, (b) non-executive management or team leaders, and (c) executive positions ranging from Director to Chief Information Officer (CIO). Gender, role, and education level were collected to explore potential variations in experiences arising from organizational power differentials. In all cases, participants met the established criteria for this study research.

Informed Consent

Participants selected for interviews were required to complete the Informed Consent form provided in Appendix C. At the time of selection, the author distributed the consent form via email to each potential participant, detailing the purpose of the research, the procedures for data collection, analysis, retention, and disposal, as well as the possible risks and benefits of participation. They were asked to voluntarily sign and return the consent form via email before any data collection activities began. Interviews were conducted after the informed consent process was completed. All participants properly executed their Informed Consent form, which the author has retained. At the start of the interview, participants were informed of their right to withdraw from the study at any time.

Confidentiality and Safeguards

Given the nature of the questions aimed at eliciting information about specific experiences, the confidentiality of participants was paramount in this inquiry. Such measures were essential for preserving the research's integrity and safeguarding interviewees' privacy. Interview materials could disclose sensitive aspects of an individual, a group, or an organization that, if improperly revealed, could have detrimental personal and professional repercussions for the participant. To prevent such outcomes, rigorous protective measures were implemented and followed. These procedures were shared with the participants in the first interview.

Data was securely stored on an encrypted, cloud-based storage drive (e.g., Microsoft OneDrive), safeguarded by password protection and multi-factor authentication. This method reduced the risks related to the potential loss or misplacement of the author's devices. To maintain data integrity, original files were duplicated within the cloud environment *to* protect against corruption or deletion. As previously mentioned, participant names were replaced with pseudonyms when analysis began. After the research, all data will be kept or disposed of according to the Colorado State University (CSU) Institutional Research Board (IRB) guidelines.

Potential Risks and Benefits to Participants

The interview process exposed participants to their interpersonal risk decision-making processes, potentially enhancing their ability to reflect on and navigate complex decisions. This heightened reflexivity could hopefully inform their capacity to mentor or advise others. However, the introspective nature of IPA may have also elicited feelings of regret, stress, or uncertainty. Several participants experienced limited distress or adverse reactions during the interview process. In each case, the interviewee was asked whether they wanted to pause or terminate the survey, yet none chose to do so. Some participants later acknowledged and appreciated the discussion as beneficial for future decision-making events.

Research Setting

Given the geographic dispersion of participants, interviews were conducted remotely using standard business collaboration tools, specifically Microsoft TEAMS. Participants were advised to position themselves in a setting that ensures privacy, safety, and optimal network connectivity. The scheduling and location were collaboratively determined to minimize disruptions. All interviews were conducted during regular business hours. With the participant's agreement, all interviews were video recorded, with full audio recording and automatic

transcription. After each interview, the video and draft transcript were securely transferred to the protected cloud service mentioned above, after which any local copies were deleted from the author's device.

Research Design

In keeping with the qualitative nature and idiographic focus of Interpretative Phenomenological Analysis (IPA), this study utilized interviews with carefully selected candidates (Smith et al., 2022). Van Manen (2016) identifies two main objectives of phenomenological interviews: (1) to elicit and cultivate a profound and nuanced understanding and (2) to facilitate dialogue focused on the significance of the experience. Hermeneutic interviews aim to uncover the meaning embedded within experiences. The interviewer intentionally steers the dialogue, using interactive questioning techniques (Moules et al., 2015). As recommended for robust IPA designs, multiple interview sessions (Smith et al., 2022) were conducted using Seidman's (2006) tripartite interview model. Each respondent was interviewed three times.

Open-ended questions are a staple in phenomenological studies (Vagle, 2018), yet Smith (2009) and Van Manen (2016) recommended using semi-structured interviews that consist of six to ten open-ended questions, including prompts. While phenomenological research traditionally seeks to reveal phenomena without preconceived theories, IPA studies may utilize existing theories as long as they do not hinder the emergence of new insights (Beck, 2021). These semi-structured interviews were guided by theoretical constructs related to psychological safety, availability, and resource exchange to deepen our understanding and critique of established models. The interviews sought to reconstruct the participants' experiences based on their recollections of memories after the fact (Crotty, 1998). Participants were encouraged to express

themselves fully, with gentle guidance, to remain focused on the topic. The interview guides, complete with additional prompts, can be found in Appendix D.

The initial interview was a brief 30-minute session focused on understanding the participant's life-world context and gathering relevant demographic data to validate the selection criteria. After this first interview, candidates were asked to prepare two examples for discussion in the next session: one where they consciously chose to engage and another where they explicitly decided not to engage. Interviewees were encouraged to identify experiences that were the most authentic and memorable rather than just those that were merely emotional or dramatic. Following the first interview, an email containing the Informed Consent form was sent to each candidate. This email also included sample dilemmas to help identify their two examples and examples and criteria to avoid, such as situations where they had no choice or interactions outside of group settings.

The primary 60-minute interview explored instances chosen by participants where engagement in potential interpersonal group risk was either pursued or avoided. This interview aimed to reconstruct the experience by positioning it within the environment, context, and emotions of the interviewee at the time of that event. To assist, participants engaged in a framing exercise at the beginning of the primary interview. They were asked to recall a recent event with vivid memories and to immerse themselves in the experience, including context, surroundings, and sensory details. They were then informed that this type of recall would be the objective for their selected experiences throughout the interview. Participants choose which scenario to start with first. While the interview protocol provided in Appendix (D) was consistently utilized, follow-up and probing questions varied based on each interview's unique themes and scenarios.

A final 30-minute interview was typically conducted within a week of the primary interview, allowing participants to clarify or correct any previous statements and explore themes initially identified by the author during transcript validation. Member-checking processes (Birt et al., 2016) were used throughout the interview to ensure an accurate representation and understanding of the situation. This third interview also delved into the imaginative variation of the experience to probe the experience's idiosyncratic aspects and clarify the phenomenon (Bevan, 2014). This exploratory process reveals underlying structures of the experience, which, when compared across the sample size, was meant to enhance quality criteria of dependability and trustworthiness.

While all transcripts were recorded using Microsoft TEAMS' built-in features, each was reviewed alongside the video and audio to ensure accuracy. At this stage, all transcripts were anonymized by replacing the proper names of individuals and organizations. Time stamps were maintained throughout the exchanges for direct quotes and theme tagging. Direct quotations followed the format (Name (Interview) Hour: Minute), such as David (2) 2:39, to enhance audibility. These annotations were applied when direct quotations were used within the analysis and indicated the start of a speaking section. In some cases, a pronoun or verb tense within a quotation may have been adjusted to enhance readability. All such changes are noted with () to indicate where the modification occurred or (...) when a statement was simplified. Efforts were made to ensure that the original meaning was not lost. A template for data collection and analysis is presented in Appendix E.

Data Analysis

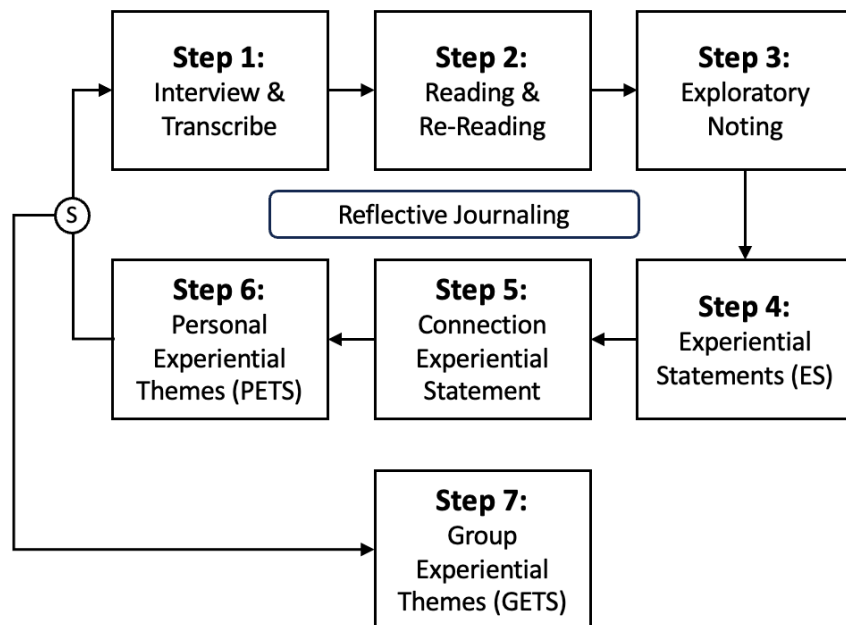
The data analysis adhered to the established protocols of qualitative research, including transcription, annotation, initial review, and thematic development from the data (Lincoln &

Guba, 1985; Bazeley, 2020). Care was taken to avoid reductive descriptions of participants' psychological states, a concern noted by Van Manen (2017). Dahlberg et al. (2008) asserted that while data collection remains consistent across descriptive and interpretative phenomenological approaches, divergence occurs during data analysis. Although there is a consensus that phenomenological research should avoid overly rigid adherence to a prescriptive methodology, Smith et al. (2022) provided a seven-step analytic framework for collecting data and interpreting participant narratives. This process was adopted and illustrated in Figure 4 below.

The initial step involved confidential interviews and a faithful verbatim transcription of the conversation. At the end of each interview, the author viewed the video and made corrections to the automated TEAMS transcription service to accurately reflect the details of the dialog. Step

Figure 4

A Summary of the Data Analysis Steps in IPA



Note: This process model summarizes the data analysis steps for IPA, where S denotes the participant saturation point. Adapted from *Interpretative Phenomenological Analysis* (2nd ed.), p. 75-118, by J. A. Smith (2022), Copyright 2022 by SAGE

2 involved meticulous and repeated readings of the transcripts to maintain an unwavering focus on the participant's account (Smith et al., 2022). The examination of the interview included audio-only, text-only, and audio-text reviews. Each transcript was reviewed at least five times, along with individual sections, as necessary. Separate reflexive journaling was used to capture reflections or gather ideas for future analysis to alleviate potential overstimulation during this stage. These initial phases were completed for the primary interview before progressing to the next participant. Second-stage interviews with a new participant have occurred in some cases before completing the third interview for a prior participant.

In Step 3, the exploratory noting phase, extensive and detailed commentary was developed. The objective was to produce unstructured notes and comments on the participant's experience by engaging in dialogue with the data, examining semantic content, context, language use, emotional expressions, metaphors, and abstract concepts for each transcript line. Through a participatory interrogation of the data, the researcher interprets the experience as “inspired by, and arose from, attending to the participant’s words, rather than being imported from the outside” (Smith et al., 2022, p. 84). Exploratory notes serve as the foundation for experiential statements.

Following exploratory notes, Step 4 involved creating experiential statements that captured key elements of the conversation regarding the participant's experiences (Smith et al., 2022). These statements consolidated the exploratory notes into manageable, concise, and meaningful accounts produced by the researcher. This process was part of the hermeneutic circle, shifting focus between the whole and the part, then back to the whole in the next step.

The next step was consolidating the experiential statements into Personal Experiential Themes (PETs) for each participant. In Step 5, PETs were created by printing each experiential

theme on paper and cutting them into individual strips. These strips were mixed randomly to avoid potential temporal or structural biases (Braun & Clarke, 2006). The strips were then physically arranged on a large, flat surface for analysis and grouping. The author conducted a series of clustering reviews for each interview sequence over several days, returning multiple times to gain new insights. These clusters were combined to create individual PET statements derived from supporting experiential statements and interview quotations. Van Manen proposed four qualities of themes:

A theme is the experience of focus, of meaning, of point; theme formulation is at best a simplification; themes are not objects one encounters at certain points or moments in a text; theme is the form of capturing the phenomenon one tries to understand. (Van Manen, 1990, p. 87).

Experiential statements did not necessarily correspond to exploratory notes, as they may consolidate recurring notes or integrate common ones.

This process resembles coding, which is commonly used in qualitative research. Coding serves as a heuristic that examines the data using a specific formula. Codes function as a means of linking analysis to recognize and connect common data (Saldaña, 2021). As codes are developed and associated, categories emerge through a synthesis process that repeats within and across cases. As a result of coding and categorization, themes develop from the data. Identifying patterns across cases is a creative and challenging aspect of data analysis (Smith et al., 2022).

Table 2 presents six commonly used methods for identifying emerging and recurring themes in interview data. Further exploration of these techniques is provided in Chapter 4.

The final step in the individual-level analysis involved assigning PET labels and crafting statements of meaning. In Step 6, clusters of experiential statements were aggregated to create

Table 2*Methods for Identifying Emerging Themes in IPA*

Method	Description
Abstraction	Clustering like with like in a "superordinate" theme and assigning a new label.
Subsumption	Using one emerging theme as a "superordinate" to assist in the cluster of related themes
Polarization	Exploring oppositional relationships among emergent themes
Contextualization	Identify contextual elements, such as temporality or culture, to connect emergent themes
Numeration	Count the frequency of occurrence of an emergent theme
Function	Examining the particular function of a the theme within the structure of the transcript.

Note. Adapted from *Introduction to Phenomenology: Focus on Methodology* by C.T. Beck, 2021, p. 96 Copyright 2021 by Sage Publications.

PETs, representing the highest level of organization within the individual construct. Sub-themes were also identified depending on the detail and scope. Each theme or sub-theme is supported by direct quotations and line numbers from the transcripts to maintain an evidentiary link in the narrative summaries presented in Chapter 4. Smith (2011) recommended the selective use of "gems" or poignant excerpts to emphasize thematic narratives. A "gem" refers to a single utterance from a case used to illustrate a theme or an aspect of a theme. According to Smith (2011), gems can be shining, apparent, suggestive, secret, or easily overlooked. While the overuse of these utterances may lead to a disproportionate emphasis on a theme, their proper use can be insightful and persuasive. Statements of meaning were developed to provide a richer

representation of each PET label. Process steps 1 through 6 were repeated until data saturation was reached, in this case, through interviews with ten individuals.

The final step in the data analysis process involved creating Group Experiential Themes (GETs). Although GETs were developed to identify convergent themes across the experiences of all participants, they are not intended to define group norms or averages (Smith et al., 2022). Instead, they seek to express “the shared and unique features of the experience across the contributing participants” (Smith et al., 2022, p. 100). Each GET was designed to synthesize the hermeneutic and dialectical analysis of the interview data co-created by the author and the interviewee. GETs are generated using a method similar to that of PETs. All PET statements were printed on slips of paper and arranged on a large flat surface to identify patterns of convergence and divergence. GET labels and statements of meaning were formulated as the final stage of the analysis.

Methods for Attaining Trustworthiness and Quality

Aligning quality criteria with the nature and objectives of the inquiry was essential (Maxwell, 2012; Morse, 2015). In constructivist epistemology, traditional methods for ensuring reliability and validity were unsuitable for quantitative research (Bazeley, 2020). Guba and Lincoln (1985) introduced the concept of trustworthiness, proposing criteria based on truth value, applicability, consistency, and neutrality. They further operationalized these standards into credibility, dependability, confirmability, and transferability, benchmarks for assessing qualitative research.

Specific techniques were integrated into each phase of the qualitative research process to ensure that the data collection and analysis produced findings that met these standards. Strategies like reflexive journaling and data audit trails were utilized throughout every research stage

(Nowell et al., 2017). Reflective journaling (Bazeley, 2020; Corbin & Strauss, 2014) documented and monitored the researcher's reflexivity. A reflective journal served as a standard tool for raising awareness of and mitigating researcher bias, where this researcher contemplated motives, emotions, and empathetic responses (Corbin & Strauss, 2014). Its role was integral to the data process outlined in Figure 4. Memos, also included in the author's journal, fostered an environment away from the source data to generate, collect, and categorize information derived from the interviews for future analysis (Saldaña, 2021; Corbin & Strauss, 2014).

During data collection, practices such as prolonged engagement, theoretically informed sampling, audio recording, precise transcription, and saturation were central to ensuring quality (Nowell et al., 2017). Member checking is widely regarded as an essential method for affirming trustworthiness in qualitative research (Birt et al., 2016), with some authorities asserting it is “the most crucial technique for establishing credibility” (Lincoln & Guba, 1985, p. 314). Member checking occurred primarily during the interviews by involving participants in the data construction process, enabling them to supplement, correct, and co-create summaries of their experiences (Lincoln & Guba, 1985). During the data collection phase, these techniques addressed and contextualized the researcher's preconceptions and reflections, thereby reducing potential biases in interpretation meanings.

The analysis and presentation stages present unique challenges in phenomenological research, especially within an interpretative framework. Drawing on Smith's (2011) evaluation of over 300 existing publications, Nizza et al. (2021) proposed four criteria for assessing the quality of IPA analyses and publications. These criteria, outlined in Table 3, highlight the importance of developing a compelling narrative at the Personal Experiential Themes (PET) and Group Experiential Themes (GET) levels. The narrative must reflect the whole-part-whole analysis

inherent to the hermeneutic circle in IPA. Additionally, the experiences under investigation should carry personal, and possibly existential, significance for the participant, fostering reflective engagement. A comprehensive and accurate analysis of the participant’s chosen words is essential to uncover what may be concealed or dormant in the participant's communication of the experience, including tone, imagery, and linguistic choices — particularly prominent elements within IPA's double hermeneutic framework. Lastly, the idiographic nature of IPA provides the opportunity for insight through the analysis of convergent and divergent experiences of the selected sample. Patterns of similarity and dissimilarity emerge when comparing experiences of ostensibly similar individuals. Smith (2004) advocated against further member-checking at the analysis and results stages. He suggested that the results might be too abstract to understand the analysis process fully and that power imbalances might render disagreements ineffective, potentially distorting results.

Table 3

Criteria for Assessing the Quality of IPA Research

Quality Indicator	Description
Constructing a compelling, unfolding narrative	The analysis tells a persuasive and coherent story. The narrative is built cumulatively through an unfolding of analytics dialogue between carefully collected and interpreted extracts from participants.
Developing a vigorous experiential and/or existential account	Focus on the important experiential and/or existential meaning of participants’ accounts gives depth to the analysis.
Close analytics reading of participants’ words	Thorough analysis and interpretation of quoted material within the narrative helps give meaning to the data and the experience it describes.
Attending to convergence and divergence	Idiographic depth and systematic comparison between participants creates a dynamic interweaving of patterns of similarity and individual idiosyncrasy.

Note: Adapted from "Achieving excellence in interpretative phenomenological analysis (IPA): Four markers of high quality" by I. E. Nizza, J. Farr, and J. A. Smith, 2021, *Qualitative Research in Psychology*, 18(3), 369-386.

The experiential themes identified through analysis provide rich interpretations of events, as demonstrated through a hermeneutical examination of interview narratives. When applied thoughtfully, these criteria maintained the integrity of a high-quality phenomenological study focused on the lived experiences of late-stage career IT professionals as they navigated the risks associated with personal resource investment during interpersonal interaction.

Limitations and Delimitations

The method and design of this inquiry resulted in certain inherent limitations. Interpretative Phenomenological Analysis (IPA) is grounded in phenomenology, hermeneutics, and idiography, operating within a constructivist epistemology. In this context, data is primarily collected from small samples. The researcher then interpreted this data, using specific methods and constructs to identify common themes retrospectively. The interview data comprised self-reported descriptions of post-event experiences, which may be inaccurate, biased, or insufficiently articulated during the interview. The quality techniques outlined earlier were used to minimize these risks. Therefore, the findings of this research, while rich, are localized and not intended for generalization to a broader population. Nonetheless, this research aimed to provide detailed analysis and substantive findings that can inform other areas of study, contribute to the cumulative knowledge base, and facilitate future research.

Delimitations in this study stem from the intentional selection of participants, data collection methodologies, and the research method. In accordance with the foundational principles of IPA, participants were deliberately chosen based on a degree of homogeneity from a specified population defined by skill, age, and experience rather than through random sampling. Participants were exclusively drawn from late-career IT professionals operating in the United States. Homogeneous samples from other cultures, organizations, and generations may

yield different insights. Data were also collected through remote interactive technologies instead of face-to-face interviews, which may have limited the researcher's ability to identify contributing contextual factors and observe non-verbal cues. Although these delimitations may restrict insights, they provide data that could facilitate future comparisons with other populations and methods.

Conclusion

The findings of this study aim to address existing knowledge gaps by enriching the current body of research and providing novel insights into interpreting these experiences. While all individuals engaged in interpersonal risk experience the stress of inherently tricky decisions, this study was designed to offer unique insight by selecting a population and method not previously used. Existing literature indicated that higher psychological safety and availability levels could benefit individuals, teams, and organizations. By deepening our understanding of these phenomena in the context of resource-based decisions, this study seeks to enhance both individual well-being and the effectiveness of organizational structures.

CHAPTER FOUR: FINDINGS

This chapter presents an analysis and findings co-constructed through participant interviews to derive the personal and group experiential themes. This data was collected to investigate the research question: *How do individuals understand the lived experiences and meanings ascribed to their decisions to allocate resources at risk within a group setting?* Further analysis at the group level addresses the secondary question: *If resources act as enablers or constraints in these decisions, and if so, which types of resources are most operative in these decisions?* The methods outlined by the Interpretive Phenomenological Analysis (IPA) method (Smith, 2009) and detailed in the previous chapter were utilized to develop experiential statements for each participant and construct group statements regarding the meaning of the underlying research phenomena. As prescribed by IPA (Smith et al., 2022), these processes were inherently hermeneutical and dialectical, based on individuals' ideographic experiences.

To maintain focus on the individual, this analysis began with an autobiographical description of the interviewee, followed by a summary of the experiences shared during the interviews. The autobiographical descriptions were written by the participant and edited solely for grammatical correctness, consistency, and to de-identify private information.

On average, each participant produced 84 exploratory notes, ranging from 52 to 118 notes per individual. These notes generated an average of 58 experiential statements, varying from 39 to 72 statements per participant. The experiential statements and supporting direct quotations were analyzed and organized into Personal Experiential Themes (PETs). Each PET was supported by between 3 and 15 quotations, with an average of eight.

PETs are personal because they are ideographic to the individual, experiential as they relate directly to the sense-making process, and thematic since they are abstracted from a specific

instance within the transcript (Smith et al., 2022). The methods outlined in Table 2 of Chapter 3 were utilized to construct the PETs. Initial clustering employed abstraction based on similarity to gather common experiential statements. Subsumption allowed for the aggregation of clusters of themes into higher-order themes. Polarization was insightful for exploring dissimilarities that revealed deeper aspects among participants. In several cases, contextualization related to role, culture, or temporality identified unique features of themes. Enumeration of specific phrases or terms was examined at the group level to uncover commonalities in usage and application. Finally, the particular function of the theme within the transcript was used to contextualize and sequence the specific experiences. This process was repeated for each of the ten participants. On average, participants had 7 PETs, ranging from 5 to 12 each. The sections below present summaries of the scenarios chosen by participants and the PETs for each individual.

After analyzing the PET levels of all interviewees, a comparable procedure was followed to create Group Experiential Themes (GETs). From the 69 PETs, seven GETs were generated to capture the shared significance of experiences within the group. These GETs are detailed in the section that follows the individual PETs. To facilitate comprehension of both the meaning statements and the temporal progression of experiences, the GETs are organized within a system framework to address the primary research question. A second model, which emerged from the initial framework, emphasizes the prevalent resource dynamics and answers the secondary research question. Each GET is accompanied by discussion content that links the findings to relevant literature and theoretical frameworks presented earlier in Chapter 2 of this study.

Individual Level of Analysis: Personal Experiential Themes

The sections below summarize the individual interviews and analyses conducted to develop the Personal Experiential Themes (PETs). The methods used to gather and analyze

participant data adhered to Interpretative Phenomenological Analysis (IPA) principles, emphasizing its phenomenological foundation, hermeneutic process, and ideographic focus (Smith et al., 2022). As previously noted, IPA is grounded in constructivist epistemology, highlighting the individual's understanding of reality as a primary interest (Lincoln & Guba, 1985). The synopses below are arranged in the order in which the interviews were conducted. Summaries of the experiences selected by the participants are provided. The Personal Experiential Themes (PETs) derived from the analysis are outlined, along with supporting statements of meaning.

David

David is 56 years old. He was born in India and immigrated to the United States 33 years ago. He earned a master's degree in computer science and has served as a senior technology advisor at a major IT consulting firm for the past two years. With over 30 years in the IT sector, he has gained experience in telecom, insurance, and finance. He has held various technology leadership roles, overseeing projects and services for his company and numerous clients across different industries. He is married, has two grown children, and resides in central New Jersey.

David's first scenario represented a situation in which he chose to engage in a potentially risky interpersonal event. He was assigned to collaborate within a group to modernize the workflows of a critical business application with the “priority of enabling developer services faster” (David (2) 4:43). Drawing on his prior experience as an application developer, he felt he had valuable expertise to offer the team to enhance the speed and efficiency of the application and improve business outcomes. One critical task was to restructure user authorization for accessing the application. If done improperly, this could expose the organization to significant cybersecurity risks. To address the issue, he needed to negotiate a new solution with the security

process owner, who was not well-versed in modern programming techniques and approached the discussion “under the impression that this cannot be done” (David (3) 20:10). Approval of the new design “was not something that he (security) was comfortable giving” (David (2) 13:11). It was “hard for me (David) to navigate, to explain, and me to get through the security partners mindset (David (2) 16:06). What was expected to take several hours to resolve extended over an entire day. The team leader believed that removing David and the security partner from the larger group would enhance dialogue and prevent disruptions and conflicts within the team.

David had not previously collaborated with the security team member and recognized that he and his colleague might feel uneasy working together. (David (2) 8:51). He empathized with his colleague, who he thought might be wondering, “How do I trust your work so that I would not get impacted? (David (2) 8:51). While the exchange with his counterpart was frustrating, he felt there was “no other option...than just to follow through. And that was just killing my instinct to, you know, kind of work with the practical nature of it” (David (2) 26:51). David was driven by an internal commitment to defined business objectives (David (2) 22:26) and a personal passion for success (David (2) 29:10). He developed new artifacts, including current and proposed process flow diagrams (David (2) 17:32;16:33), to clarify his proposals and reveal previously hidden aspects of the issue (David (3) 18:44).

The final product represented a negotiated settlement that fell short of what could have been achieved but was meaningful because “it’s still transforming” (David (2) 22:26). The results were presented to and accepted by both the larger group and the leader. In the first scenario, David risked failing to fulfill business commitments if he chose not to engage constructively with the security team member. Instead, he negotiated a sufficiently transformational change to be seen as successful by the larger group.

David's second scenario involved avoiding participation in a potentially risky interpersonal event. While working for a previous organization, David managed all IT infrastructure operations. However, the infrastructure was not performing as expected during a program to consolidate multiple environments inherited from acquisitions. To resolve these issues, an IT incident call was initiated to gather the necessary experts to restore service.

As an experienced IT administrator, David believed he had the technical knowledge to manage the incident process. His team had recently and successfully conducted several similar consolidation activities. He thought, "Some pattern would be present, so I believed it could take much less time to resolve" (David (3) 3:31). As the incident progressed, he resisted the growing temptation to "put on my technical hat," as he "felt that I wouldn't get enough response even if I asked" (David (2) 37:28). He recognized the need to control a "personal instinct to give me the keyboard" (David (3) 10:52). After some reflection, he considered that "if I had been involved, I would have risked delaying the process" (David (2) 41:30). Instead, being new to this specific role, he chose to seek advice from other leaders (David (3) 6:45) who had experience with the relevant subject matter experts to assess their ability to resolve the issue (David (2) 54:03). David felt he had developed a "natural instinct" (David (3) 26:56) over thirty years in IT regarding how to manage risks driven by dependence on others.

As the accountable IT leader, David was also required to report progress to the company's CEO, which created significant pressure to resolve the incident quickly. He remarked, "I'm risking getting myself involved, so either I could be successful, or I could fail, right?" (David (3) 11:36). He felt that his job could be at risk (David (3) 12:02). Ultimately, David decided not to engage and jeopardize his position with leadership due to his lack of specific knowledge. Instead,

he put his trust in the experts on the phone. As a result, the team acted effectively to restore the application's performance.

The analysis of both transcripts generated 118 exploratory notes and 57 experiential statements, which were summarized into eight Personal Experiential Themes (PETs). The PETs related to David are presented in Table 4 below.

Table 4

Summary of David's Personal Experiential Themes

PET	Statements of Meaning
Personal Identity and Passion	Fear of embarrassment and a passion for problem-solving drove a delicate balance between engagement, personal identity, and business risks.
Role of Others	Trusting others and balancing personal risk required putting his self in their mindset and engaging with their experiences while recognizing that reliance on others often meant resisting the instinct to control.
Time to Build	Building trust, shared understanding, and norms required time and experience, making discussions longer but valuable for future interactions.
Time Reveals	Exploring options and working through disagreements revealed hidden insights, enabling compromises that added value even when the optimal solution was not achieved.
A Shadow of the Past	Prior experiences and preconceptions built confidence but limited solutions, requiring suppression of instincts to break past patterns and drive new improvements.
Clarity through Role Structure	Clear expectations, defined roles, and structured protocols aligned personal commitment to business goals, managed risk, and fostered engagement, though accountability did not guarantee a solution.
Artifacts Overcome Ambiguity	User stories and artifacts created a neutral framework, allowing teams to navigate negotiations and clarify understanding, while technical knowledge helped overcome emotions.
Risk of Failure	The perceived risk of job loss increased as power distance increased.

Adam

Adam, 56 years old, was born in southern India and had a diverse upbringing across several international locations. He earned a bachelor's degree in engineering in India and subsequently served as an Engineering Officer in the Indian Air Force, leading a signal unit of over 300 personnel. With more than 30 years of experience in the IT sector, he has worked in startups and large enterprises, both domestically and internationally. He has held various leadership roles, overseeing the launch of new businesses and offerings, ranging from new products to corporate integrations and acquisitions. Adam holds multiple patents, has authored numerous publications, and possesses two master's degrees from American universities in the southwestern United States. He is married, has three children, and resides in the Southwest US.

Adam's first scenario involved not engaging in a potentially risky interpersonal interaction. Considering the complexity and emotions expressed, this example spanned the second and third interviews. Adam worked as a product manager at a large internal IT services company, where senior executives tasked him with developing a new strategy to compete with rivals in the emerging and potentially lucrative public cloud market. Adam conducted extensive market and technology research to shape his proposal. As he prepared for the meeting, he remarked, "The data points were pretty strong; I did my research" (Adam (2) 18:28).

The proposal was presented to six to eight executives during a virtual meeting, with support from Adam's direct manager. The recommended strategy was high-risk, as it required cannibalizing significant existing revenue streams within the company. Adam firmly believed the risk was justified to secure a substantial future market share in a shifting technology landscape. However, the proposal was not well received by the senior executives. Within the first 15

minutes of the presentation, comments such as “That’s the stupidest thing we could ever do” (Adam (2) 9:50) indicated strong resistance to Adam’s proposal. He vividly recalled:

So still remember that whole chart and uh and it was pretty brutal when I presented that, umm, in terms of the blowback I got right. So, uh. It's uh in the senior management at the time didn't understand it. It was a Kodak moment for me.” (Adam (2) 3:44)

His manager tried to offer support by steering the executives back to the proposal. Since he was not an expert in the technology or the market, he could only provide limited assistance.

After receiving feedback from the executives, Adam “just disengaged, um, and said OK. I got a family” (Adam (2) 3:44). Seeking validation from this author, Adam later mentioned, “It was the words, and it was just the questions that came out, and it's questions that were framed a little condescending, right?” (Adam (2) 21:08). He felt that his career was at risk (Adam (2) 22:03) because the market was “too embryonic at this point in time for me to bet my job on it” (Adam (2) 33:08). Adam recalled feeling that they had not given him a fair chance (Adam (2) 23:59). After a few more minutes of discussion, “it just got to the point where we had to just quit” (Adam (2) 28:15), leading to the early conclusion of the meeting. Later, Adam reflected, “After that, I got a little bit disenfranchised too. Right after that call” (Adam (3) 11:28).

In those two interviews, Adam expressed regret for not defending his position more vigorously (Adam (2) 3:04), especially given his accountability for the final results of the decision (Adam (3) 7:31). He was confident in his ability to construct a strong recommendation based on data, stating, “I love coding and all that stuff, so I'm more logical, trying to build logical arguments and with data and giving data” (Adam (2) 26:20). His identity and pride in his work were rooted in his “pedigree” (Adam (2) 36:49), which derived from his prior success as a student and a small business owner. In the third interview, he further justified his stance by

saying, “I would have really, really pushed out if because of the sense of killer spirit and urgency that I used to carry when I was a small company as a system integrator by myself” (Adam (3) 1:41). Adam regretted his decisions as he felt they didn’t represent his authentic self.

He also felt that his South Asian culture had "let him down” (Adam (2) 14:39). Feeling as if he were a “guest rather than being part of...an American company,” he was embarrassed to recall that he "defaulted to... they know better than me” (Adam (2) 14:39). He stated that when he is “with an audience that has more power than me, I'm not myself at and it frustrates me” (Adam (3) 14:20). He remembered, “I was just speaking from what I know and what I did research on, I didn't consider the factor of what's the culture and environment which I'll be presenting” (Adam (2) 44:22). Ultimately, he felt he lacked the experience and perspective compared to the executives to “risk that much money” (Adam (2) 34:19). Adam’s regret over his decision not to engage further in this discussion persisted through the second and third interviews, necessitating a fourth interview focused on a decision to engage.

In the fourth interview, Adam was asked to provide an example of a time he chose to engage. He described a situation where he initially refrained from discussing another employee but ultimately felt it was necessary to address an ongoing performance issue with a peer and his supervisor. Adam was responsible for generating new business for a product. He was assigned to work with an individual from another team, managed by a peer who had great confidence in that employee. Adam believed that the employee was not committed to performing the work at the required level, saying, “That guy didn't care because he was super close to his manager that hired him in the first place that he was getting protection from” (Adam (4) 17:24).

There were early signs of substandard performance by the employee. Adam stated, "I was doing the heavy lifting. I was doing his job and my job” (Adam (4) 2:09). When Adam initially

expressed concerns to his superior, he was told that as an executive, he was expected to “develop the talent” (Adam (4) 2:09) while also fulfilling his assigned mission. Sensitive to his relationship with this peer, he wanted to “save his face in front of his boss, whom Adam interacted with on a daily basis” (Adam (4) 6:20). He became hesitant to “push it too much more because he (the peer) was getting defensive about his recommendation selection” (Adam (4) 7:38). Believing that “you have to take some short-term hits to preserve a long-term relationship” (Adam (4) 13:17), he withheld further action for several months. Seeking advice, Adam consulted his mentor, who confirmed that his position was both unfair and untenable (Adam (4) 15:40). Adam had “the accountability, but (didn’t) have the choice to make changes that (were) needed” (Adam (4) 21:24). Finally, frustrated by the lack of new business leads, Adam engaged with the new management once they were assigned, who was less personally invested in the employee (Adam (4) 9:11). The new management provided Adam with the support he needed to act regarding the employee.

In the second example, even though Adam took several months to decide to engage, he seized a change in circumstances to tackle a persistent problem. With the arrival of a new leader unbound by previous decisions and a shifting risk/reward balance fueled by frustration, Adam acted to have the underperforming employee reassigned to another team. Reflecting further on his self-image as a risk-tolerant small business entrepreneur, he regretted not acting sooner (Adam (4) 14:08).

The analysis of transcripts generated 96 exploratory notes and 49 experiential statements, summarized in seven Personal Experiential Themes (PETs). The PETs for Adam are presented in Table 5 below.

Table 5*Summary of Adam's Personal Experiential Themes*

PET	Statements of Meaning
Sense of Self	Influenced by the degree of power distance, feeling drained eroded his authenticity and confidence, leading to disengagement and withdrawal, leaving behind a sting of regret.
Limits to Authenticity	Facing a new challenge of amplified risk, his cultural inexperience and past experiences limited his authenticity.
Internalized Role of Others	Stepping into others' shoes heightened responsibility, yet cultural limits, insufficient power, and the tug between familial and work support created an internal struggle that led to retreat.
External Support from Other	Validation and support by others, sometimes built through consensus building fueled decisions but enabling and protective relationships often concealed underlying issues.
Impact of Signals	The condescending tones eroded his confidence, and defensive signals gave rise to personal barriers.
Power over Data	With time slipping away and power imbalances, his frustration arose to drive an instinct to protect credibility and reputation.
Artifacts and Structure	Amid ambiguity, he attempted to use data and clearly defined goals to manage uncertainty, but when absent he defaulted to power dynamics.

Bob

Bob is 52 years old. Born and raised in New England, he has lived in various locations along the East Coast. For the past 26 years, he has been employed at a leading global marketing and publishing company, where he has held multiple positions across different business and IT departments. He is a liaison between the Engineering and IT departments, helping the product and Engineering teams with several digital product offerings. He has been married for over 25 years, has three adult children, and lives in Colorado.

The first scenario Bob chose illustrated a situation where he decided to engage in a potentially risky interpersonal event. Bob has worked as an IT service product manager for nearly 15 years at the same organization. Senior management opted to increase participation with

a partner Bob found problematic. He felt the need to “really wrap my head around how I was going to feel and work with this client knowing that I really didn't like the way that they fulfilled or delivered on our product” (Bob (2) 4:36). Early on, Bob expressed his concerns about this decision, stating, “I mean, there was there was definitely dialogue, and I'm quite sure that I told him openly that I would have some concerns with sending more money to this partner based off of the historical problems” (Bob (2) 13:56). In response, while management was open to discussion, he did not share anything they didn't already know (Bob (2) 14:56), and ultimately, “the decision was made above the product manager's head” (Bob (2) 15:36) to proceed with the expansion.

Given his expertise with the product and his demonstrated commitment to business objectives, Bob believed, “I was a kind of a protected asset in a way they didn't wanna lose me.” (Bob (2) 9:13). With this level of confidence and his perceived obligation to an organization that had recently experienced “a lot of turnover” (Bob (2) 7:03), he decided to accept the partnership expansion. He stated, “I don't like the decision, but I'm gonna support it” (Bob (2) 17:28). Bob's choice to support the decision after expressing his concerns was motivated by a desire to prevent potential future failures that could lead to wasted effort and inefficiency, much of which would fall on him directly. Explaining why he wanted to engage, Bob said:

I definitely wanted to be involved with this of from the get-go. I wanted to make sure that I was there monitoring it, providing feedback, and if needed, be a voice to pull the plug on the whole thing if it really turned out badly. (Bob (2) 7:03)

And:

It's gonna lead to a lot of negative feedback and it's going to ultimately get back to leadership and I didn't want to...I didn't want to have my name on something that was gonna fail, right? (Bob (2) 20:12)

Bob felt compelled to support what he saw as a misguided decision, partly to avoid additional work burdening him later.

Failures would lead to direct engagement from senior management. Bob expressed that he "just did not want a lot of executive complaints to come in that would ultimately have my name pinned to it in some capacity" (Bob (2) 27:46). These complaints might harm his reputation (Bob (2) 29:36) with leadership, potentially putting his job at risk (Bob (2) 29:36); (2) 30:33). He believed that "if it gets sideways, then there's just there's probably no coming back from this" (Bob (2) 32:34). Failures would increase the threat to his image and reputation (Bob (2) 32:34) and could lead to his product being pulled from the market, jeopardizing his special status and protections (Bob (2) 35:32).

Bob's recent experiences indicated that finding an equivalent-paying job would be difficult (Bob (3) 19:03) since he was more costly than younger employees. Additionally, losing his job would greatly affect his family, particularly with a child in college, as well as the advantages of a flexible work schedule and location for their home life. (Bob (3) 19:03). Based on perceived threats to his reputation and implications for his future role, Bob frequently chose to engage but also deferred to others he believed had more advanced technical skills.

Bob initially had difficulty finding an example of a time he did not engage, drawing on experiences outside this study's scope. After several minutes of reflection, he recalled an instance when he opted not to engage due to his perceived lack of technical expertise. This theme persisted into the third interview.

As a product manager, he relied on technical experts to design and implement the features he deemed essential for the product to achieve business objectives. While he was responsible for diagnosing issues and executing changes, others possessed higher-level technical skills in system architecture and programming. In these situations, he felt he did not “have the technical prowess to be able to speak logically or with much impact” (Bob (2) 41:59). This feeling made him “super quiet on a lot of these calls just because I don't have a lot of ug, again, the, the, the technical pieces to be able to contribute” (Bob (2) 43:29). He held back, fearing that “I just kind of look(ed) like a fool at times, not having the technical expertise” (Bob (3) 5:45). In the past, there were moments when “I fe(lt) kind of foolish because, you know, they'd mention the system and I'll say, well, what is that? And I'm like, oh, well, that's kind of the backbone of this whole product” (Bob (3) 13:04). Consequently, he avoided situations that could make him seem foolish in front of his colleagues and manager, which might also be noticed by senior leadership (Bob (3) 16:05).

Bob provided a specific example of this condition. When working with a particular, highly skilled technician, Bob acted as a conduit for others who wanted to avoid that expert. Speaking about this technician, Bob stated, “He's brilliant, but he's just extremely difficult to work with, so a lot of people will kind of backdoor me into working with him so that they won't have to work with him” (Bob (2) 45:00). While Bob had successfully challenged his difficult colleague in the past, he typically defaulted to established roles instead of stretching technical decisions beyond his perceived limits capabilities. He explained:

There's times where I just bite my tongue. I I work from home, so I'm in pacing around in my office, just shaking my head on mute. Double checking that I'm on mute going. This, you know, X isn't gonna work for whatever reason, right? I'm just thinking out loud.

Oftentimes, and what now? My dog is looking at me weird and things and I I'm like, I don't think that this is gonna work like this. It just doesn't make any sense to me. (Bob (2) 51:01)

Bob limited his willingness to engage with others he viewed as having superior technical skills, even when he felt confident in his opinions based on past experiences. Bob believed he strongly tended to engage in dialogue, even in risky situations. He said, "I really can't think of a lot of times where I've just said no. Umm, you know, in that moment" (Bob (3) 11:26). While he thinks the impact of job loss at this stage of his life is more significant than in earlier stages (Bob (3) 19:03), the likelihood of losing his job is lower because he can successfully navigate complex risk situations. He feels that his ability to separate work from home effectively and an enhanced capacity to focus on the most critical priorities enhances his overall mental health (Bob (3) 25:41).

When asked about support, Bob acknowledged he had a strong social support system composed of friends and former work colleagues. This support system offered Bob a "safe environment for us to just kind of bleed some stuff out and potentially air some grievances and things like that if we need to" (Bob (3) 28:05). Bob relies on his family and colleagues to gain support and develop an understanding of difficult situations and relationships in the work environment.

The analysis of all transcripts generated 99 exploratory notes and 72 experiential statements, which are summarized in twelve Personal Experiential Themes (PETs). Several PETs were identified as subordinate themes within one superordinate theme but were listed separately. The PETs for Bob are shown in Table 6 below.

Table 6*Summary of Bob's Personal Experiential Themes*

PET	Statements of Meaning
Acceptance – Initial response	Open dialogue helped him to overcome past concerns, resulting in a willingness to commit and support the path forward.
Acceptance - Environment	While feeling safe to voice concerns, he internalized doubts and skepticism about real change.
Acceptance - Factors	He found top-down decisions tough to swallow, as muted feedback and a manager's limited awareness generated frustrations simmering beneath the surface.
Internalized role of others	Filling others' gaps and acting as a control point blurred his role boundaries to bred frustration.
Externalized role towards others	Relying on others' abilities offered support but heightened risk, as his shortcomings and failure to learn erode confidence in outcomes.
Gaining support from others	Close friendships at work created a safe and supportive environment.
Tolerance for risk	Workload strain and lingering layoff fears drove reluctance to push back, shaped by past experiences of job risk and vulnerability.
Role of knowledge	Insufficient technical skills and knowledge bred silence and caution as confidence rested on specialized and valued expertise.
Image Risk	Fearing reputational harm amongst peers and superiors, he avoided asking questions that could be perceived as dumb.
Job and Security	Preservation of status and image took priority, while thoughts of job security and family followed as reflections after the fact
Implication of failure - Immediate	Driven by concerns of past failures, he pushed to voice concerns now to avert future risks.
Implication of failure - Future	His fear of failure was real, with risks of added workload, lost value, and job insecurity driving a restraint to safeguard the future.

George

George is 55 years old. He was born in the western United States and is of European descent. For the past 24 years, he has been part of an IT group at a large healthcare company. He has over 36 years of experience in the service sector, including IT and the restaurant industry. He has held several leadership positions and managed team performance in both fields. He has been

married for 29 years, has four grown children and one grandchild, and lives in the western United States.

During both interviews, George struggled to articulate instances where he successfully engaged in interpersonal risks. Although he began with examples of engagement, his responses ultimately portrayed him as someone who avoids risky encounters. The examples involved multiple yet specific interactions with peer managers or staff during team meetings and collaborative decision-making events.

As a more experienced manager than his peers, he led a community engagement committee for several years. This committee included approximately nine staff members who volunteered to promote morale-boosting activities. According to George, three committee members actively contributed, while six others did not. When asked if he confronted the non-participating members, George admitted that he no longer did (George (2) 12:28). His primary reasoning was that since the committee was voluntary, the non-contributing members “would have returned...the minimum amount or lower quality effort just because you asked” (George (2) 14:58). He felt that these members “had been granted the resources and the opportunity to go and participate, then they choose not to” (George (2) 15:56). George believed he had high personal standards (George (2) 15:52). He confessed that a contributing factor to his disconnect with the team members was, “I think that this is a huge truth about me is I kind of expect everybody to have the same work ethic that I do. And it surprises me when they don't” (George (3) 26:05).

As a manager, he firmly believed that he had “no problem calling people out” since he had “never been sunshine and rainbows” (George (2) 20:28). He explained that he developed his management style from his first manager, who had a strong personality and led his organization based on principles learned during his military career. George recounted that he “thrived and

used to fight with him all the time, and he would just say, 'George, you gotta go do your job. Stop crying. Go work'" (George (2) 20:28). He reminisced that "he did so many things that would be HR violations (today)" (George (3) 14:04). Heavily influenced by this foundational experience, he believed that if he was "going to be spending (his) energy, (he) didn't think (he) needed to spend time on mediocrity" (George (2) 18:03). Over time, the committee meetings became a "waste of my time and it was an overburden for the three people who were doing the work" (George (2) 9:11). George began to withdraw his engagement from the group.

As the interview progressed, George revealed deeper reasons for his withdrawal. Based on prior experiences of expressing his opinion, he shared:

The feedback, although it is put, it has been shared with me more professionally, is that I'm a bully. And I don't wanna be a bully. Right. The perspective, you know, but people will go and say, well, you know George is mean. (George (2) 19:58).

In characterizing himself as "a bit of a bull in a China shop" (George (2) 36:30), he expressed his disapproval of this branding. He was also concerned that the negative implications associated with this term would likely worsen further over time (George (2) 22:49) as organizational norms and sensitivities adapt to the evolving perspectives of new generations of employees (George (2)) 36:30).

As the oldest member of the peer group, he regularly interacted with younger and less experienced peer managers. Internally, he struggled with the unearned confidence of these younger managers, who "have an authority complex... they have an expectation that they are going to walk in and just be in charge" (George (3) 10:31). When comparing his approach to theirs, he observed:

When I'm when I'm the new guy, I I listen and learn and defer. And how do you do it right? And I and I don't walk in expecting to be in charge. That isn't. That isn't true anymore. You know, you gotta they they walk in. You gotta respect me and I know. And I've been in. I've been doing this for four years, which it it makes me giggle every time. Wow. Four years. Wow, you rock. I have shoes older than you and that's that's my ageism. That is absolutely my ageism. (George (2) 43:39)

He acknowledged that he struggled with shifting norms and his consequent ageism towards younger generations of managers, which frequently led him to withdraw from challenging situations.

While he had “been working very hard on trying to moderate (his) overconfidence” (George (2) 22:49), he recognized that he was less aware of how to engage with new people and often chose the wrong methods (George (2) 35:39). He was surprised when younger managers had not developed a “certain amount of thick skin tolerance” (George (2) 36:30). He struggled with “a personality type that he ran into conflict with; it’s the one who doesn’t handle conflict well” (George (3) 23:05). He believed their lack of resilience led them to feel offended; however, they did not respond directly to George, which revealed a primary concern of his.

He was not concerned about his peers' opinions; instead, he worried about what they might share with management (George (2) 45:00) behind his back (George (3) 10:31). George felt that negative feedback had led to repercussions in the past. He had been required to undergo remedial training in active listening twice and emotional sensitivity three times. Additionally, 360-degree peer comments had been documented and included in year-end performance evaluations. He worried that this information was “written down...it’s around forever” (George (2) 40:02). He explained that he was “list-driven...don’t be on the list” of underperformers

(George (2) 56:05). He recalled valuable advice from his mother to continually evaluate “cost versus payoff” (George (3) 1:21). These consequences led to both private and public embarrassment, causing George to avoid risky situations by “staying in my own swim lane” (George 54:43).

As an older employee who was not yet ready for retirement, one of the burdens that weighed heavily on George was the financial risk of losing his job. At this late stage in his career, he believed it “is less and less worth it, especially as I get closer to the end of my career, but I don’t think about that in the moment” (George (2) 45:00). George seemed particularly concerned about his image with his manager and the potential impact that might have on his job and future career. While he was proud of accomplishing more than he ever thought possible (George (2) 52:37), he felt anxious due to his inadequate retirement funds. He feared having to find a similarly paying position (George (2) 40:55) or being forced into early retirement (George (3) 18:00).

George consistently expressed confidence in his capacity to navigate complex and high-risk situations, stating, “When I when I feel the danger, I am less likely to engage, but I don't feel the danger very often” (George (3) 21:13). Nevertheless, across all scenarios, George expressed hesitation to engage due to his uncertainty with evolving organizational and cultural norms, as well as the potential repercussions for infractions. As a result, George remarked, "Over time, I have become much more risk averse” (George (2) 50:25). While striving for a secure retirement, George experienced an internal conflict between his values and contemporary realities.

The analysis of all transcripts yielded 85 exploratory notes and 61 experiential statements, which were condensed into six Personal Experiential Themes (PETs). George's PETs are presented in Table 7 below.

Table 7*Summary of George's Personal Experiential Themes*

PET	Statements of Meaning
High Personal Standards	Driven by high standards, he engaged selectively to preserve energies when others do not appear committed to the same standards of excellence.
Internalized Role of Others	When perceiving a gap between self-image and others' views, he engaged selectively, avoiding conflict and prioritizing long-term goals over risky interactions.
Externalized Role towards Others	When navigating changing group dynamics, he avoided conflict-sensitive peers, relying on role boundaries for clarity, and prioritizing group norms over preferences of new members.
Image Risk	Driven by reputational concerns and past embarrassments, he avoided engagement and prioritized a positive image with leadership over a need to be right.
Risk to Job and Security	With limited resources and high replacement risk, he felt compelled to avoid relationship mistakes, aware that errors at this career stage would carry steep costs with fewer chances to recover.
Role of Structure	Rooted in early training and influential mentors, his decision-making was intuitive and experience-based, with heightened risk awareness fading as confidence in patterns emerge.

Matthew

Matthew is 60 years old. He spent his youth as an Army child on bases in Germany, Kentucky, and Alabama. For the past four years, he has worked as the Chief Information Officer (CIO) of a national research laboratory. He has dedicated most of his 35-year IT career to higher education, transitioning from technical roles to leadership positions at various colleges and universities. Recently divorced, he has two grown children and lives in the western United States.

Matthew provided several instances of engagement and withdrawal throughout both interviews, mixing them across various examples. While based on specific instances, he highlighted his organization's culture and decision-making model. In his quasi-governmental

education organization, the decision-making authority model was complex, if not unique. Although led by a president and Chief Executive Officer (CEO), the organization functioned under a broadly stratified authority model championed by the CEO. It was unclear from the interview whether the CEO's leadership style influenced this culture or if the leader occupied that position because his style was compatible with culture.

The decision-making authority within his company was stratified between top-down managed decisions and extreme democratization. Matthew described the environment as:

We have a very sort of unusual management structure where you know, in a weird way you're not presented with a lot of decision-making opportunities, quote-unquote, above your pay grade and nor are you necessarily presented with a lot of opportunities to weigh in on decisions that haven't already been made before you got there. (Matthew (2) 2:57)

In some cases, the CEO will make a unilateral decision (Matthew (2) 2:57), or the decision may have been made beforehand through private conversations disguised as public discussions (Matthew (3) 30:14). This decision-making process contributed to uncertainty and, at times, disillusionment with leadership.

In other instances, decision-making authority was shared among all employees within the organization. For example, when the new Chief Human Resources Officer (CHRO) received recommendations from a third-party consultant, the CEO stated early in the review, as paraphrased by Matthew, that “we're not doing any of this unless every single person in the organization agrees with every single aspect of every single recommendation” (Matthew (3) (9:25). Matthew described the empowerment model as “it’s not just a universal vote, which would be toxic enough. It’s a universal veto” (Matthew (2) 16:09). This standard has resulted in

unclear decision-making and accountability models, where entities outside of formally defined missions assumed informal roles power.

Considering this context, Matthew's first scenario examined his decision on how to respond to a request for an IT capability that was no longer seen as industry best practice and had been withdrawn from service by his IT organization. Given the prevailing authority model, Matthew had to decide whether to accommodate this request. He could reject it or potentially secure outdated equipment to reinstate the service for the new employee, a researcher with some influence in the organization. This was an active decision that was still pending for Matthew. While weighing his options, his main question was, "Is it a hill I want to claim I will die on and then not die on it if the guy pushes back?" (Matthew (2) 6:14). At the time of the interview, Matthew was leaning towards rejecting the request, justifying his stance by saying, "As long as you always have a defensible position, then it doesn't really matter if people disagree with you because you can say how you got, how you're writing your conclusion" (Matthew (2) 6:14). If he issued this clear response, it would be evidence of engaging in the risky action rather than avoidance.

The second scenario focused on Matthew's in-role identity. As CIO, Matthew was empowered to consolidate and manage five IT departments into an efficiently run organization (Matthew (2) (9:46). For this to occur, he needed to persuade each director to change, which is not uncommon in IT organizations. Leaders of large organizational segments, such as the research laboratory director, may not be required to follow common processes and standards. However, it is unusual to allow all roughly 1,400 employees, including IT administrators and operators who may prefer to maintain their independence, to have a vote. Burdened by this model, which challenged his professional self-image and standard IT industry practices, Matthew

expressed his frustration when he said, “We're going to pretend it's strategic. As an IT professional, it makes me insane; as a taxpayer, it makes me even more insane. As the CIO of this organization at this time, it's what I can achieve” (Matthew (3) 12:05). Taking a pragmatic approach to these issues, he believed he did not need to agree with every decision made within the organization (Matthew (2) 38:33). Rather, he thought:

My job is to propose doing things the smart way and pivot when I am told we're not doing it that way. So, my job is to succeed, not to win. As I said before, this will this will be successful, it just won't be the best practice. It won't be national standards. It won't be modern. It won't be any of that. It won't be efficient. It probably won't be all that effective, but I can make it succeed. So, like practically, I think I can make it work right? And my job is not to build the most theoretically beautiful IT shop in the world. My job is to make IT work in this organization at this point in time, with this set of constraints, so I can do that. So, I have to ask myself, do I care about being a great IT person or do I care about succeeding in the context of this organization? And right now, I've decided I want to succeed in the context of this organization, even if it means I have to hold my nose and be a bad IT guy. (Matthew (3) 14:44)

Given the uncertainty and ambiguity surrounding the process and outcomes, Matthew adopted a pragmatic approach to engagement, focusing on what he can achieve rather than on prescribed ideals or objectives.

He explained that for him to advocate for a position, three conditions needed to be met. First, the position must be defensible with data or logic (Matthew (2) 8:27). Second, it must be perceived as adding value to resolving the issue or decision-making (Matthew (2) 25:30). Lastly, he needed to care enough or have something at stake regarding the issue to express dissent

(Matthew (3) 42:02). The combination of these conditions led Matthew to engage in discussions that involved interpersonal risk selectively. He explained, “I've always kind of the way I got here was getting a reputation for only weighing in when I need to, and I'm always having something smart to say.” (Matthew (2)) 3:55).

Matthew described a third example in which he acted but, as a result, faced retaliation and conflict. As a manager, part of his responsibilities involved addressing the performance issues of team members. In this role, he felt compelled to send a formal email to an employee who was misbehaving, behavior which Matthew also considered unethical, to initiate corrective action. The employee responded by alleging that Matthew was creating a psychologically unsafe and hostile work environment. Consequently, the Diversity, Equity, and Inclusion (DEI) Committee investigated his actions. As a result, Matthew “felt incredibly stressed about the security of my job for about four months” (Matthew (2) 27:32). While he considered himself a long-term advocate for DEI initiatives, including the establishment and sponsorship of a committee within his organization, the scope and influence of these initiatives led to unexpected outcomes:

I've never been in place anywhere where you had to be so cautious about holding people accountable and where you had to be so cautious about insisting that I need this by this date. Like that stuff just doesn't fly here, and it makes it incredibly challenging to get anything done, and it makes you always feel psychological unsafe. You always feel you always feel like a psychologically unsafe you're 100% of every day. (Matthew (2) 19:59)

In this case, prescribed policies aimed at fostering inclusivity and input created an environment that Matthew perceived as unsafe and ineffective.

After several months, the Human Resources team concluded that the DEI committee had no authority to investigate or act in that case. The informal structure and democratization of authority models led to inefficiency and insecurity. However, on the interview day, Matthew spent much of his time drafting another email to the same employee regarding ongoing underperformance. Although he had not sent it by the time of the interview, it was a source of persistent stress and distraction. He voiced his ongoing concern by stating, "There are very few things that can kill a career; being dragged and having a reputation as an anti-DEI can kill a career" (Matthew (2) 23:04).

The interviews also explored how Matthew assessed the risks involved in these situations. Although he expressed concern about this job several times (Matthew (2) 27:32), it did not seem to weigh heavily on his decision-making process. Furthermore, when asked about the potential consequences of reputational risk, he downplayed the concern by saying:

I have seen people with excellent reputations turned out so, so I know that having a good reputation internally is essentially unrelated to whether or not my employment continues. So I don't have to worry about the reputation aspect and also I know that having a horrible reputation internally will have no impact on my continued employment because there's tons of people with horrible reputations here. (Matthew (31:45)

Matthew seemed primarily motivated by the desire to perform his responsibilities well rather than by job loss or reputational harm.

He outlined three factors that influenced his overall confidence level. He always kept his resume updated, remained aware of open positions in his industry, and acknowledged that he has successfully transitioned roles multiple times throughout his career (Matthew (2) 49:56). As the oldest participant and possibly closest to retirement, Matthew noted that he is also willing to

accept a lower title or a lower-paying position for the remainder of his working career (Matthew (2) 51:15).

The analysis of all transcripts generated 90 exploratory notes and 66 experiential statements, summarized in nine Personal Experiential Themes (PETs). The PETs for Matthew are shown in below.

Table 8

Summary of Matthew’s Personal Experiential Themes

PET	Description
Internal Self-Image	Battling frustration and a sense of futility, he weighed the risk of speaking up, knowing that weak accountability and external control often undermined the impact of their decisions.
Prior Experiences	Facing an environment unlike prior experiences, he realized that conventional roles and norms might not apply.
Decision Making Norms	Hindered by diffused decision-making and unclear rules, he saw his role undermined and resources wasted, as universal vetoes weakened authority and drove ineffectiveness.
Decision-Making Process	Motivated by a sense of justice and careful timing, he chose to speak only when necessary, weighing personal stake and defensibility of their position to preserve influence.
Roles and Position	Operating within role boundaries, his organization preferred private dialogue over public risk, accepting predetermined decisions by leadership.
Job Security	Backed by experience and resources, he felt assured in handling unexpected job changes, based on confidence from known options and the visible success of others.
Image and Reputational Risk	Balancing mission and pragmatism, he guarded a self-image of high performance, cautious of accusations that could leave lasting damage regardless of truth.

Richard

Richard was born in India and raised in West Africa. Since his teenage years, he has lived in the U.S. and Canada, holding passports from three different countries. He is trained as an electrical engineer and earned an MBA from a top-10 university in the U.S. Over the past 25

years, he has worked across various industries. His consistent focus on IT-related roles at all levels, from middle management to individual contributors, is evident throughout his career. He currently serves as a product manager for engineering at a leading tech company. He is married and lives with his family in the western United States.

The first scenario Richard selected illustrated a situation in which he chose to engage in a potentially risky interpersonal interaction. Richard was a consulting leader for a segment of a services unit within a large IT company. He was part of a matrix team assigned to a significant customer, overseen by an account sales team and its leader. During a customer call with over twenty participants, including senior leaders from the client, a member of Richard's extended team inquired if he could establish a billable engagement. While such requests were not uncommon since the delivery leader was incentivized based on billable hours, the senior account leader had expressly informed the team that the call was solely for informational purposes and should not be sales-oriented (Richard (2) 8:32). The account manager is the empowered leader for all customer interactions and decisions (Richard (2) 17:19). Richard had spent several months unsuccessfully working to build a relationship with him (Richard (2) 21:02).

Richard faced a dilemma, to support his colleague or follow the direction of the senior sales leader. If he chose not to support his teammate, he acknowledged, "The implication of that would have been that I would have been able to continue working with that particular account team, and then (I would) have had a seat at the table for when the opportunity was actually realized" (Richard (2) 15:26). Alternatively, he could have chosen to back his colleague, after which the account team's response might have been that "he (the account manager) would probably have spread the word that...he's (Richard) not to be relied upon" (Richard (2)) 16:04).

Anticipating retaliation from the account manager due to his reputation for being very tough (Richard (2) 26:37), Richard chose to support his team member in defiance of the sales team's direction (Richard (2) 18:06). When asked why, he explained, "I felt that this fellow Sam (delivery member), he supported me in many, many the things over the last few months. And yeah, and I was grateful to him for that. So, I almost felt like I owed him" (Richard (2) 11:53). He added that he had a "sense of loyalty" (Richard (2) 14:44) to his colleague. Richard also admitted that he felt compelled to answer questions directly rather than defer or reshape the issue (Richard (3) 0:56). He stated that there is a "psychological innate need to say something" (Richard (3) 4:28). Richard felt compelled to respond to avoid "people think(ing) you are weak or you are stupid" (Richard (3) 9:28). Consequently, he informed the customer that they had extensive experience resolving similar issues with other clients and would like to establish a formal billable arrangement. In reply, there was "dead silence from the customer. There was dead silence from the account manager and his people" (Richard (2)) 13:30).

Richard's decision resulted in two main consequences. First, although it remains unclear whether his actions directly caused it, his company failed to secure a potentially profitable deal that could have surpassed the business goals of the account team, the professional services team, and Richard himself. Second, he was removed from future client engagements due to a loss of trust by the account team (Richard 2 24:00). Not only was Richard reassigned, but on the day of the third interview, he discovered that his organization was restructuring, leaving him uncertain about his future. It was only during later reflection that Richard recognized there might have been a third option to redirect the discussion to another topic instead of addressing it directly (Richard (2) 30:05).

Richard's second scenario involved a decision to avoid a potentially risky interpersonal situation. This experience occurred earlier in Richard's career when he was outside the targeted age group for this research. Consequently, only aspects from other participants' examples are cited as supporting material. Richard worked as a program consultant with a large international consulting firm, assigned to a major client to manage a complex and troubled program. He took over from the previous lead consultant at the request of the client leader, known for being unpredictable and excitable (Richard (2) 45:48). Shortly before the incident, Richard received positive feedback from the same client leader regarding his performance on the project.

During a regularly scheduled program status meeting, Richard communicated that the project faced difficulties again. About ten people were in the meeting room, with four to six participating via conference call. Richard explained that the program issues stemmed from the customer team members' failure to provide the necessary inputs for progress. When the customer leader inquired about their lack of execution, they deflected the blame back onto Richard and his team (Richard (2) 38:38). At that moment, the leader muted the phone and made derogatory comments, including expletives, directed at Richard.

The immediate response of both Richard and the others in the room was inaction, driven by shock and silence (Richard (3) 12:27). Richard stated, "I have never, in any professional setting, ever had somebody with the F word on me" (Richard (2) 42:18). After the initial shock, he remembered thinking, "It's not fair to blame that on me" (Richard (2) 43:32). He also recalled reflecting on a comment someone had recently made to him about a "career-limiting move" (Richard (2) 44:49). This customer was important and generated significant revenue for his company (Richard (2) 44:10). If another consultant was replaced due to inadequate program

performance, the contract could be terminated. This could impact Richard's reputation within the company and the industry, ultimately affecting his job and career (Richard (2) 47:56).

Richard was asked for another example since the second experience fell outside the research parameters. He described a recent situation in which he chose not to engage in interpersonal risk. He participated in the hiring of new employees for his team. He established a rubric to objectively assess and determine which candidates would receive an offer (Richard (2) 50:25). After completing the one-on-one and panel interviews, the results were consolidated. Discussions were held in a team meeting with five panel members and Richard's supervisor to decide on the offers. Using the rubric, one external candidate received a higher score from Richard and the panel. However, the manager overruled the team by extending an offer to a known internal candidate (Richard (2) 52:46).

Richard chose not to challenge his manager, stating, "So I I bowed to I bowed to that" (Richard (2) 52:46). He explained his decision by referencing an experience with a former manager. This earlier manager had overruled a team-based hiring decision in a similar situation. Richard later discovered that the manager had promised the job to the candidate before the interviews. When Richard confronted the previous manager, he remarked that the manager "made life difficult for me" (Richard (2) 54:09), which led to an unproductive relationship afterward (Richard (2) 57:06). He described the previous manager as a "bully," which brought back memories of being bullied on the playground during his childhood (Richard (2) 1:00:10). Richard believed that in such circumstances, he tended to avoid direct conflict to escape harm (Richard (3) 13:46). These memories of his former manager and bullies replayed in his mind as he considered whether to defy his current manager regarding the hiring decision. Ultimately, he chose not to challenge the decision.

Table 9

Summary of Richard's Personal Experiential Themes

PET	Statements of Meaning
Influence of Personality Traits	Innately compelled to engage and support others, he acted quickly to avoid appearing passive yet struggled with discomfort around ambiguity and unanswered questions.
Internalization of Others	Bounded by a sense of loyalty and indebtedness, he accepted personal risk, prioritizing commitments to trusted peers over future career opportunities.
External Influence by Others	Constrained by the power dynamics of a dominant matrix leader or a high-stakes customer, he yielded to decisions, knowing from past experience the futility of resistance.
Response to the Unfamiliar	Surprised by an unanticipated personal attack outside of norms, he responded with silence, shocked at how to respond.
Role of Artifacts	Relying on structured artifacts to guide decisions and set expectations, he used data and documentation to bound the engagement and mitigate perceived risks.
Failure Risk	Driven by a need to protect reputation, he prioritized self-preservation, concerned an image of failure spread amongst others, jeopardizing both current incentives and future opportunities.

The analysis of all transcripts generated 79 exploratory notes and 64 experiential statements, summarized into six Personal Experiential Themes (PETs). The PETs for Richard are shown in Table 9 above.

Stacey

Stacey graduated from the University of Aberdeen in Scotland with a master's degree in strategic studies. She spent ten years as the Senior Intelligence Fellow for the Office of the Director of National Intelligence. During that time, she was appointed to the Strategic Multi-Layer Assessment Team, where she supported the National Security Council. After leaving the Intelligence Community, she took on the role of Senior Manager for various governments, overseeing change initiatives for IT infrastructure. Later, she transitioned to a large public cloud

company as a Senior Manager in the Emerging Markets Division, where she led its Risk Intelligence Division.

Stacey's background was the most varied of all the participants. She devoted a significant part of her professional career to national intelligence, then supported IT processes within the government, and recently worked on risk assessments with a large public cloud provider. Her most recent assignment and its length qualified her for this research. For her first example, Stacey chose a situation in which she decided to engage in potentially risky interpersonal interactions with significant implications.

Stacey was the only woman assigned to a team of intelligence analysts, which was primarily composed of former military personnel, operating in an active combat theater (Stacey (2) 5:27). It took her "about six months to eight months of working daily with the team (when) I was actually sort of started to be what I considered integrated into the team" (Stacey (2) 32:03). Within the team, there was one particular member:

Who was extremely bravado, he was very, he was arrogant, he was very arrogant. He was in, he came from special forces. And of course, he retired from special forces and then was picked up...And he was very, very difficult to work with because everything you said he would come back and say no, no." (Stacey (2) 12:26)

Each day, the team convened to analyze intelligence from various sources and produce executive summaries (XMs) for the General Staff (Stacey (2) 12:26). For the final XM, all team members "would all collectively agree on what the executive summary, the final output is going to be" (Stacey (2) 12:26). Stacey was usually asked for her opinion last on an XM that might have already been finalized by the team (Stacey (2) 32:03). She worked under challenging

circumstances as the only woman on a team of confident, even arrogant, operators in a demanding environment with extreme consequences.

On one occasion, Stacey thought the team's emerging consensus was misguided. She had gathered data from other intelligence sources indicating that actions should be taken in a different location within the theater of operations. She felt confident in her data because:

I knew them personally because I worked with them in (location) for for years. So I knew that the quality that I could trust, like I could trust what they were saying was accurate.

My other team members didn't know them on a personal level like I knew them. (Stacey (2) 12:56).

Stacey felt compelled to propose an alternative because she was confident in her data (Stacey (23) 18:10) and relying on incorrect information could pose a direct risk to lives (Stacey (2) 28:36). She believed she was "entrusted with that position at that time because I don't tell people what they want to hear; I tell them what the facts are based on the data. And that was my job" (Stacey (2) 28:50). Furthermore, she acknowledged her desire to challenge the arrogant team member:

For me it was about a check on his actions and behavior. To look at things differently.

And to respect others opinions based on primary source data. But I wanted to push my team member to realize that there are other perspectives that are that may be more important. (Stacey (2) 24:12)

She considered herself a "quiet individual like I'm an analyst at heart" (Stacey (2) 23:14). Nevertheless, she also stated, "I wanted to make my point very well known that I was equal with everyone else" (Stacey (2) 34:15). These factors motivated her to challenge the team's consensus. She believed she had "a responsibility to make a decision" (Stacey (2) 38:23).

The team discussed the issues for about twenty minutes when Stacey decided to speak up. At one point, she recalled someone attacking her with alternative data they had collected. When asked why she perceived the exchange as more than a healthy debate among colleagues, she explained that it differed due to the stakes involved. First, she emphasized the seriousness of the risk to human lives if the recommendation was incorrect. She believed her data provided more compelling indicators than the challenger's (Stacey (2) 19:16). Second, she felt her reputation in a high-trust environment would be significantly harmed. She summarized it by stating, “It wouldn't necessarily be the end, quote, unquote, of my career. It would be the end of my reputation, and it would it would cause substantial harm to others” (Stacey (2) 27:42). However, Stacey later mentioned she was confident she could find another job (Stacey (3) 12:05), partly because she had transferable experience and had prepared for it (Stacey (3) 16:23).

After a team discussion, they agreed to accept Stacey's recommendation, and the executive summary regarding the realignment of resources to another location was submitted to senior command. In doing so, they successfully achieved the mission objectives. Several months after the team disbanded and she returned to the United States, Stacey received an award in recognition of her recommendation (Stacey (2) 38:41). Later, she encountered the arrogant member of her team who knew about the award but never congratulated her on receiving it.

Stacey's second example occurred during her tenure at a large public cloud company, where she led a division within the Risk Intelligence group. She held weekly meetings with fellow managers and her superior to discuss operations, organization, and performance. This company relied a participatory management style, with decisions made by consensus following team-based discussions (Stacey (2) 41:46). During the weekly meetings, another manager to questioned her about one of her team members' performance (Stacey (2) 43:53). Stacey stated:

She would say things to make up a narrative for her senior leader which was (Mgr) to recognize that she's managing the team,..She was creating a false narrative about one of my team members. One of my direct reports. And I knew she was creating that false narrative because I never got guidance in writing. She never sent me an e-mail, and I know for a fact in all of our one-on-ones, because I take meticulous notes in our one-on-one conversations with anybody that I have in a team dynamic or any one of my direct reports anytime. (Stacey (2) 45:34)

Stacey believed this arose from a personal dislike that another manager had for her team member (Stacey (2) 49:55) and that she was intentionally crafting a plan to orchestrate the employee's dismissal (Stacey (2) 52:30).

Stacey took pride in her command of the data (Stacey (2) 52:25) and fiercely protected her team. She expressed, "I love my team. I care deeply, deeply, deeply about any person that I am responsible for managing. I care deeply about their welfare" (Stacey (2) 45:34). Although she considered herself a "mild-mannered type of person" (Stacey (2) 55:53), she chose to confront the other manager directly during a weekly meeting to safeguard her team:

I wasn't going to allow her to push me into that corner to do that to one of my direct reports, when I knew what she was doing was painting a false narrative. So I got to the point where I said no. I need to I'm a manager. My job is to protect my team. (Stacey (2) 55:53)

Stacey later decided to leave the company for personal reasons. She remembered that on her last day, a team member told her:

I have never, ever had a manager like you. Never. And I am so grateful of everything that you have done. Everything you've taught me. You've taught me to be a better person a

Table 10

Summary of Stacey's Personal Experiential Themes

PET	Statements of Meaning
Sense of Self and Reaction	With a deep, familial sense of responsibility toward their team, she challenged authority despite facing intimidation, at times rationalizing his actions to protect self-image.
Influence of Group Dynamics	As the only woman in a male-dominated team, she focused on transparency to foster trust, mindful of past conflicts and resisted emerging groupthink.
Inflection Point	Faced with an inflection point where team risk became real, she acted by stepping outside normal trait boundaries to protect their team and uphold fairness.
Clarity of Structure	Anchored by clear roles and team norms, she initially framed decisions within the structure of defined leadership and collective agreement.
Role of Artifacts	Preferring documented facts over personal feelings, she constructed her position on perceptions of reliable data and pre-determine constructs.
Risk of Failure	Despite confident in skills and market value, she found the potential of losing her career identity unsettling and saw the true risk as damage to her reputation rather than job security.

better teammate and he said I am grateful for everything that you've ever done for me. (Stacey (2) 1:00:02). Stacey mentioned that she is primarily driven by a strong ethical commitment and framework (Stacey (3) 6:10) and her dedication to her team as employees and individuals.

The analysis of all transcripts generated 75 exploratory notes and 59 experiential statements, summarized in six Personal Experiential Themes (PETs). The PETs for Stacey are presented in Table 10 above.

Michael

Michael is 56 years old. He was born in Southern California but raised in Utah from age four. He has German and English heritage. For the past ten years, he has served as a technology executive at a large healthcare services company, and over the last 30 years, he has held technologist positions at three prominent domestic and global firms. His responsibilities have

progressively increased from data analyst to solution architect and leadership roles, including experience in large-scale application and infrastructure transformations and acquisition rationalization. Matt is married, has three college-aged children, and lives on the East Coast of the United States Coast.

While Michael offered valuable insights into evaluating risk and making participation decisions, his examples were often general, frequently outlining the conditions for both decisions in a similar order. After describing the corporate environment and culture in which Michael worked, the conditions he detailed for engagement or withdrawal are analyzed

Michael's company is a large pharmaceutical and research provider in the healthcare industry that has expanded over several decades through numerous acquisitions and mergers. This model of growth has influenced the corporate culture. Michael stated:

And we operate very much as a small company, right? So, and and it's important to remember that for a company like ours it grew through acquisition every our entire business at one time was a family owned distributor that had responsibility for a ZIP code or town or something. And so that mom and pop feel. Has been what..that's the culture.”

(Micheale (2) 50:54)

This culture shapes the firm's decision-making model, where “everybody at that mom-and-pop got together around the counter and decide(d) what they're going to do that day” (Michael (2) 50:54). In this culture, people are “just a little too nice” (Michael (2) 5:41), and no one gets “called on the carpet” (Michael (2) 53:13). However, organizational uncertainty and competitive pressures are gradually prompting changes to the culture. During his tenure alone, there have been three Chief Information Officers (CIOs), with an interim currently holding the position until the new leader arrives (Michael (2) 41:09).

When asked to provide a scenario, Michael began with a situation he chose to engage in. In this example, he was updating his manager and peers on the status of specific IT infrastructure. He described himself as “very comfortable talking about, you know, what our program and risk is” (Michael (2) 2:46). In this situation, there appeared to be very little ambiguity or conflict for Michael to navigate, which made engagement carry minimal risk. Michael also noted that “In crisis, I feel like when it's really a crisis. Well then I'm very comfortable speaking up” (Michael (2) 8:07). While the risks are more significant in a crisis, the demand for in-role performance and clarity provided by the defined decision-making parameters—such as an IT infrastructure leader managing an IT infrastructure event—seemed to encourage Michael to engage directly. Michael explained that it was the “marginal” cases that present the most risk (Michael (2) 24:19). He mentioned that this was “where judgment matters, and judgment is a weird alchemy of experience and knowledge” (Michael (2) 24:19).

Michael discussed several factors that have prevented him from taking interpersonal risks. His first reason for hesitating within their corporate culture was to avoid contradicting his peers in front of leadership. He stated, “I kind of hang back and maybe don't want to contradict my peers, even though there may be a difference of opinion” (Michael (2) 2:46). Regarding his superior, he remarked, “I didn't feel comfortable putting my boss's feet to the fire in front of the rest of the group” (Michael (2) 11:55). However, he noted that although he is not against challenging his peers or his leader, he believed it should be done in a specific manner. “I'm perfectly comfortable having that conversation with my team. I'm comfortable having that conversation one-on-one with my leader, but not in a group. Not with the whole league team” (Michael (2) 9:54). This highlighted his personal preference (Michael (2) 24:19) and emphasized the corporate norm of addressing conflict in private settings rather than in public.

His second condition for avoiding engagement was profoundly personal. Michael holds a university education in theater management and initially worked in the New York theater industry at the beginning of his career (Michael (2) 13:42). While he believed this experience taught him valuable collaboration and planning skills, he did not perceive himself as a “real technologist” (Michael (2) 35:14) and felt “imposter syndrome” (Michael (2) 14:59) in the presence of technology experts. When discussing complex technologies, he often withheld sharing his thoughts due to the “risk of looking foolish or having a foolish point of view that somehow will uncover that I actually have never touched the back end of a server or any of this technology” (Michael (2) 13:42). He acknowledged that “when it comes to a tech stack, I don’t know that I have a technical opinion” (Michael (2) 24:19). Concerning his management style, Michael considered himself a “logic engine” (Michael (2) 24:19), utilizing algorithms developed over time, along with his natural intelligence and approach, to identify, test, and resolve problems—even in fields where he lacks expertise. He also tended to handle ambiguity by establishing structure, such as decision-making models or policies (Michael (3) 18:09).

Michael acknowledged feeling a “non-stop fear of being fired” (Michael (2) 15:13). Although he used the word “fear” eleven times during the interview, he admitted that these feelings might not be entirely accurate rational:

But I'm intellectually, I'm able to overcome my emotion by my intellect and say, ‘Michael, you're you've been in the technology business for the vast majority of your life. Right? I've been doing this for 25 years. I did it professionally for five. In my early 20s, it's, you know what I mean. It's like, but that still sits in there. (Michael (2) 18:40)

To compensate for this risk, he described himself as a “hustler” who would “outrun you” and “might not be smarter, but (he) will work harder than you” (Michael (3) 14:78).

Based on his recent performance and experience in the IT industry, Michael knew that the chance of losing his position—especially for speaking up in group settings—was low. However, he remained haunted by his past experiences. He watched his father lose his job in his fifties, just a year shy of qualifying for retirement, which deeply impacted their family (Michael (2) 20:35). He described his childhood as "very judgmental," which made him hesitant "to question authority" (Michael (2) 11:44). As he grew older, he strived to become more empathetic, which he acknowledged was a challenge (Michael (3) 57).

The interviews and scenarios explored what he would risk when deciding whether to engage. Michael explained that even though he loved working in theater, he left because he couldn't achieve the financial security he desired (Michael (2) 32:30). He viewed "providing for his family as like the number one item and so...I look at any threat to that as very close to my core" (Michael (2) 15:13). Now, at fifty-six years old, Michael is not yet ready to retire, both professionally and financially (Michael (2) 18:08). However, he mentioned he might resist further advancement offers (Michael (2) 29:42). He acknowledged that he "just needs another five or so years to stack some more away" (Michael (2) 29:42), but he also believed that the best way to achieve this is by continuing to solve complex problems, helping his team grow, supporting business objectives, and developing the next generation (Michael (3) 22:25).

An analysis of the transcripts generated 57 exploratory notes and 47 experiential statements, summarized in six Personal Experiential Themes (PETs). The PETs for Michael are shown in Table 11 below.

Table 11*Summary of Michael's Personal Experiential Themes*

PET	Statements of Meaning
Personal Motivation	Driven by a commitment to family and a desire for personal autonomy, he found purpose in his career and was motivated by praise and influenced by past experiences.
Personal Traits	An introvert who valued hard work and logic, he projected extroversion when needed, viewing risks as challenges to be conquered rather than approached with empathy.
Structure of Organization and Culture	Operating with a collaborative and safety-focused culture, he prioritized corporate objectives yet felt increased pressure to prove his value when leadership was present, due to a risk of embarrassment.
Role Structure	Preferring to solve issues independently to prove his value, he avoided challenging authority unless his integrity was directly challenged
Deciding Factors	Preferring private conflict resolution, he engaged selectively, guided by clarity and confidence in data and a drive to create structure when facing ambiguity or areas outside his expertise.
Impact of Failure	Focused on protecting his image and financial security, he maintained credibility cautiously, balancing limited career ambitions with an unsubstantiated fear of job loss.

Anna

Anna is 53 years old. She was born in Oklahoma, spent her early years in New York, and moved to the West Coast in 1977. She was raised by parents who immigrated from Asia. Before 2000, she worked as an engineer in a manufacturing firm. Anna currently holds a leadership position in the government sector of a major IT provider and, before that, held leadership roles in delivering IT products and services to clients globally. Anna is married, has two daughters aged 17 and 19, and lives on the West Coast with her family.

Anna selected an event where she decided to act quickly as her first example. At the time, her responsibilities included managing a portfolio of customers who regularly executed multiple IT transition and implementation programs. Her company tightly controlled expenses for those

projects, often requiring senior executive approval for incremental costs. In support of one of her programs, Anna needed approval from the country's Chief Financial Officer (CFO) for a small spending request to mitigate risks for a customer program. After several email exchanges, the CFO replied with approval that included aggressive and disparaging remarks, describing those involved as a "pain in the rear" (Anna (2) 4:00). She quickly replied to the CFO in a direct private email, challenging his behavior and messaging to a broad team. Anna stated, "I think there was just like a moment of 30 seconds where it's like, are you gonna do something or not? And I was like, I'm 100% doing something" (Anna (2) 13:50). He initially responded that afternoon by rationalizing and dismissing the issue.

After the CFO's initial response, Anna explained that she pursued the matter further for several reasons. She stated, "It is unacceptable that you think you can speak to people like this, especially when I'm advocating for our client" (Anna (2) 4:00). She believed that this behavior was not only unprofessional but, considering the distribution list, also violated company policies regarding retaliation and creating a hostile work environment. Notably, she viewed this as a personal affront to her integrity and a demonstration of public disrespect. She remarked, "I take pride in examining the data and the facts before I say yes or no. I don't want to waste money carelessly; I'm very deliberate about how I spend it" (Anna (2) 25:33). She later mentioned, "Over a 30-year period, I think it's happened twice. I fe(lt) really disrespected, and on both occasions, I've taken action" (Anna (2) 34:42). Anna explained that disrespect triggers strong feelings for her and is rooted in her childhood relationship with her father (Anna (2) 4:00):

It triggered something in me that made me react very strongly and I think it goes back to my childhood experiences with my dad, who was, a he was just a bully, and I just don't

do well with disrespect. I don't do well with treating people without, you know, professionalism. (Anna (2) 4:00)

Anna felt compelled to act based on a challenge to her integrity, influenced by past experiences.

Next, she believed it was necessary to put an end to the normalization of such behavior (Anna (2) 28:49). She stated, "I'm big on small things that happen without noticing or without taking action. And before you know it, you're somewhere that you. Don't even recognize. And so it was really important to me to say something" (Anna (2) 4:00). Anna also explained that she acted to protect the junior members of her team who, while trying to do what was right for their client, might feel confused or demoralized by such direct and unprofessional messaging (Anna (2) 30:16). Anna felt acted to check bad behavior and to protect others.

Anna depended on several factors when deciding to act and during subsequent events. First, serendipitously, she was on a call with a trusted colleague when she received the initial email from the CFO. Although she usually preferred to handle such decisions independently and tended to "move solo on those types of things" (Anna (2) 27:29), her peer reminded her of her obligation to act. "I think that was the push that I needed," she said (Anna (2) 13:50). However, as a female, she was concerned that her messaging could reinforce the stereotype that "women are emotional or more emotional than men" (Anna (2) 13:50). For further validation and support, Anna sought advice from her superior after receiving the follow-up response from the CFO. Her superior agreed with her assessment and assisted. Finally, Anna formally engaged Human Resources (HR) not only for support but also to "put it on record" (Anna (2) 26:32) in case of retaliation from the CFO. The next day, her supervisor discussed the situation with the CFO, who expressed regret about the message by the end of their conversation. Following the project's successful go-live, the CFO apologized through an email sent to the original distribution list.

When asked about the risks of her actions, her first response was, “This could cost me my career” (Anna (2) 13:50). Further discussion revealed that this risk would likely appear as damage to her reputation first. While she feels obligated to protect her team's reputation, she admitted that her primary motivation was safeguarding her integrity (Anna (2) 28:49). She recalled initially focusing on herself. She later considered those around her, especially those included in the email's distribution list (Anna (3) 0:27). Regarding the CFO, she stated, “He could do damage my reputation with people that I don't have a relationship with” (Anna (2) 17:05). She was concerned that he might, either actively or passively, use his network to impede her future career growth opportunities (Anna (2) 20:11). Finally, she also faced the potential risk of being unable to perform her job effectively going forward, as the CFO retained the authority to approve future spending requests.

Several factors influenced Anna's decision to accept the risk. First, she evaluated her current financial situation and determined that she could handle the possibility of losing her job. Her children are older, and they have adequate savings for college (Anna (2) 37:36). She also felt confident that as an experienced executive, “there's another job for me out there in tech as a brown woman” (Anna (3) 11:06). Third, she reached out to several colleagues in other organizations and throughout the industry to explore additional opportunities (Anna (3) 20:14). Anna also felt supported by her supervisor, Human Resources, and the effectiveness of the corporate norms and policies established for these situations (Anna (3) 37:36). Given her confidence in her professional skills, network, organization, and financial situation, she felt compelled to engage with a senior executive to address unacceptable behaviors.

Anna's second example involved a situation in which she did not engage. Although this example was less detailed and emotional, she recounted it with regret over her inaction. Her new

leader held monthly financial reviews of his portfolio. During these reviews, the responsible account leader was expected to report on performance against established targets and outline the necessary actions to address any gaps. During one such review, a team member failed to provide the required information to the leader, a former finance executive known for maintaining high standards of detail. This leader publicly chastised the account leader, stating, “You're just talking. There's no data, there's no information. You haven't done a build. You know, this isn't, this is, I need numbers. I need data. I need information. I don't want you just selling something to me” (Anna (2) 38:45). As her team member did not supply the expected information, Anna faced the decision of what action to take, if any.

Anna believed she typically spoke up in group settings. She stated, “I would say something in a situation like that because I just don't. I just don't agree. That, like, take it offline or let him come back with an answer, or let him do something.” (Anna (2) 38:45). She preferred to address conflict in private settings (Anna (3) 7:58), similar to the email exchange with the CFO in the first example (Anna (2) 4:00). Grounded in her innate demand for respect, she said, “Ninety percent of the time, I will step in and stop it,” but in this instance, she did not. She was uncertain how the leader would react to being challenged. Anna was new to the team and had not yet developed a relationship with her new leader. If she had spoken up, she would have risked “our unformed relationship, trust potentially, loyalty” (Anna (2) 42:24). She noted later that she feels more compelled to protect and assist others by being an advocate and mentor (Anna (2) 49:15). She was “feeling the need to defend the underdog” (Anna (3) 11:06). She recounted this example with regret for not living up to her expectations.

The analysis of all transcripts generated 87 exploratory notes and 64 experiential statements, summarized into five Personal Experiential Themes (PETs) in Table 12 below.

Table 12*Summary of Anna's Personal Experiential Themes*

PET	Statements of Meaning
Personal Motivation	Driven by a demand for respect and integrity, she set firm boundaries and preferred independent action, shaped by a sense of duty and influenced by formative childhood experiences.
Structure of Organization	Preferring clear rules and structure, she relied on data to manage emotions and sought organizational support to mitigate risks amid ambiguity.
Operating Norms	Preferring respectful conflict resolution, she viewed public shaming and personal attacks in professional settings as unacceptable, favoring private discussions to protect individual dignity.
Deciding Factors	Compelled to act by a public display that crossed acceptable boundaries, she felt compelled to act to prevent the normalization of bad behavior, safeguard her team, and maintain integrity for all.
Risk of Failure	Confident in her market value, she accepted career risk, prioritizing duty to others and protecting their reputation above career advancement.

Rachel

Rachel is a 58-year-old woman of Asian and European descent raised in Southern California. She has worked in IT, primarily in end-user support roles, for over 23 years in the government and healthcare sectors. Over the past seventeen years, she has held various management positions, including leading IT support teams and delivering large programs and projects. She is married and has a daughter and three grandchildren.

Rachel chose her first example, which involved a decision to participate in a group discussion about hiring choices. Her organization ran a program to recruit technicians for several junior positions. After conducting interviews, they discovered more qualified candidates than available positions. Rachel was asked to provide recommendations on selecting from the candidate pool. She became aware of an offer extended to a candidate who she believed did not meet the qualifications of the other applicants (Rachel (2) 12:29). She also learned that this

candidate was related to a current employee on a higher-level team (Rachel (2) 8:57). Although they were on different teams, the teams collaborated to resolve customer issues, which could raise potential conflict of interest concerns. Remembering her frustration, she stated:

So, I remember going through that expressing my frustration, but at the same time letting them know about the reasons why that's not best practices you really need to take a lot of precautions. Did I did it purposely with this group was the saying, you know, give person enough rope. I purposely wanted to make sure that they can make decisions on their own, and so therefore, I wanted to make sure that I could go back and provide the appropriate coaching. (Rachel (2) 8:57)

She was not someone who "typically not want to sit back and not ask that question" (Rachel (2) 41:21). She saw it as her duty to engage with the team as a coach or mentor. She also felt that she typically took the initiative.

She stated that she has a reputation as a "bulldozer" (Rachel (2) 13:35). As proof, she recalled a colleague telling her that "one of the groups of technicians at the desk had a bet going on which of the new managers was going to make an employee cry first. I was the winner" (Rachel (2) 13:35). It may be noteworthy that Rachel works in the same organization as George, who was also labeled as a bully.

When asked if she was risking anything through this engagement, she replied, "No, not really. I I I say it that way because I'm known to have a little bit of a thicker skin" (Rachel (2) 13:35). She also mentioned the trust and support she received from her leaders as reasons for comfortably engaging in group dynamics. Rachel recalled that one of her senior leaders was the first to know about a high-risk medical condition and witnessed her "completely breakdown" (Rachel (2) 41:21). She felt secure being vulnerable, which reinforced her trust in the leader. She

viewed another leader as a strong example of an “educator” who encouraged “curiosity” (Rachel (2) 45:51). These circumstances enabled her to safely conduct “fact-finding” discussions (Rachel (2) 49:19) in complex situations.

Rachel struggled to identify a situation in which she did not engage. She believed it was her natural tendency to participate (Rachel (2) 25:13). When pressed, Rachel's second example revealed deeper aspects of personal risk through an instance where she chose to limit her engagement and transparency. She was asked to participate in an interview with Human Resources regarding a senior leader in her organization. Although the conversation was promised to be confidential, she felt, “Things come out. So yeah, I feel it could be a risk” (Rachel (2) 16:09). She answered questions honestly but was more guarded than usual due to concerns about “retaliation, although that shouldn’t have been the case” (Rachel (2) 20:11). To manage her situation, she recalled that she “didn't ask for it. The request came to me because it was someone else that brought something up” (Rachel (2) 10:56), which to her meant she was not the one at risk.

When asked about potential retaliation, Rachel expressed a deeper concern rooted in previous instances where “Jobs are gone. I've seen positions removed in my past life. I mean, I've been laid off three times in my career. I've been there. Were those positions were just eliminated?” (Rachel (2) 22:25). She acknowledged that those eliminations might have been, and likely were, non-retaliatory events; however, she also didn’t know the reasons behind the terminations (Rachel (2) 22:25). The unanswered questions about why the jobs were eliminated “makes me very cautious and wary” (Rachel (2) 25:20) and seemed to help her construct her narrative, which included the idea of retaliation.

She also felt affected by a prior incident in which she was reprimanded for using inappropriate language while challenging an employee's excuse for being absent. Although she received a formal warning, she managed to keep her job because she was honest when confronted about the violation (Rachel (2) 28:28). She remarked, "I still recall that, and so just being that overly cautious" (Rachel (2) 30:13). These past experiences seem to significantly influence her current decisions about whether to take risks or avoid them.

When examining these scenarios, she envisioned a risk to "my reputation, just the way I take pride in my work" (Rachel (3) 13:26). Rachel also recognized risks to her job and career. She acknowledged that while her career path is limited, she has been reluctant to move to other organizations for further growth. The opportunities presented to her carried too much inherent risk (Rachel (2) 37:59). Although she accepted the constraints, these situations posed perceived risks to her job. The conditions could ultimately be viewed as risks to "my family, my home, and the stability that I provide, and how that won't be there" (Rachel (2) 32:49). She embraced these risks based on her confidence in her abilities (Rachel (2) 22:25) and a higher level of risk tolerance that developed as she got older (Rachel (2) 41:04). However, she noted that "my current life situation, actually my life, brings more stress into the workspace" when describing the impact of home life on her work risk profile (Rachel (2) 51:10). Overall, Rachel accepts the limitations on future career advancement and expressed some concern that home life further eroded what she could contribute to her environment.

Rachel's interviews yielded the fewest results among the group. She was the most hesitant participant and required encouragement to participate in discussions. The analysis of all transcripts generated 52 exploratory notes and 39 experiential statements organized into five Personal Experiential Themes (PETs). Rachel's PETs are shown in Table 13 below.

Table 13*Summary of Rachel's Personal Experiential Themes*

PET	Description
Personal Trait and Image	Balancing a reputation for toughness and honesty, she cautiously managed emotional reactions, influenced by past experiences and a sense of accountability to the organization.
Externalized Role of Others	Conscious of past public embarrassment and a reputation as a bulldozer, she held back in large meetings and was concerned that private conversations could become public.
Obligation to Others	Motivated by responsibility, she took on risk and advocated for junior team members, creating a supportive space for learning.
Leadership Norms	Grounded in trust with their manager and a commitment to defined processes, she sought guidance from others, balancing respect for norms with a cautious approach to direct challenges.
Risk of Failure	Balancing family pressures with career aspirations, she approached decisions carefully, affirming choices through self-reflection while remaining aware of reputational risk and team morale.

Summary of PETs

In total, 69 PETs were identified from 578 experiential themes generated by analyzing the 21 recorded interviews with the 10 participants. PETs included themes focusing on individuals' identity and self-image, radiating through and with others while interacting with their environments' social and organizational norms. Participants were asked about their perceived risks of engaging and how they might manage those conditions. The following section explores the Group Experiential Themes (GETs), how they interact, and their implications.

Group Level of Analysis: Group Experiential Themes and Discussion

The sections below present a group-level analysis and discussion of the primary and secondary research questions. The Group Experiential Themes (GETs) examine patterns of similarity and dissimilarity among the individual accounts (Smith et al., 2022). The objective is to comprehensively understand the participants' collective experiences while preserving the

richness of their narratives. In keeping with the ideographic nature of IPA (Smith et al., 2022), the GETs seek to connect the personal and collective dimensions of individual experiences.

The GETs were derived from the sixty-nine individual PETS mentioned earlier, using an approach similar to the PET process. The individual PETS were printed on slips of paper and arranged on a large, flat surface. Over several sessions, themes emerged, highlighting commonalities and unique characteristics. According to constructivist epistemology (Lincoln & Guba, 1985), GETs, like PETS, are confined to the contextual-historical aspects of the experiences described by the participants and only provide “insight about the phenomenon, not empirical generalization from a sample to a population” (Patton, 2002, p. 40). To qualify as a GET, the experience is shared by at least four participants (Smith et al., 2022). Divergent experiences with a theme are included in the primary theme in an attempt to reveal additional insights. Careful attention was given to maintaining an audit trail of the themes through identifiers linked to the original interviews, including relevant direct quotations.

The analysis process revealed seven themes: (1) identity, (2) reflections, (3) norms, (4) dilemma, (5) control, (6) boundaries, and (7) resources. The seven themes address the primary research question regarding how participants experienced their decisions to take or avoid interpersonal risks. The final section tackles the secondary research question about the role of resources and identifies which, if any, were most operative to the participant-selected interpersonal risk experiences. Collectively, these seven GETs, shown in the system diagram and described in the supporting statements, strive to express the participants' lived experiences and highlight the resource decisions that were most significant in their accounts.

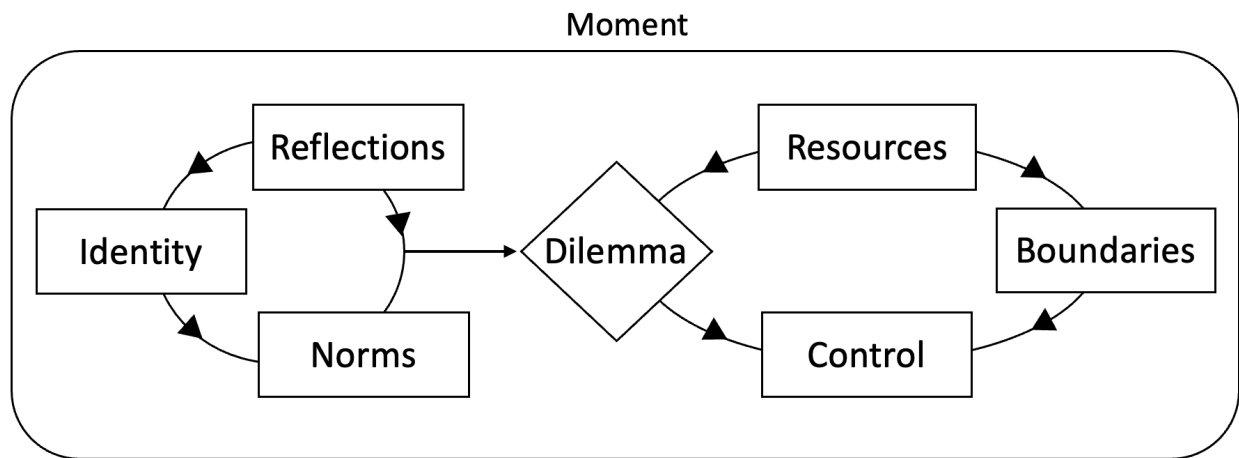
An integrated narrative of the complexities the participants face as they decide whether to engage in or avoid interpersonal risk is provided to address the primary research question.

As they approach a risky encounter, they experienced a heightened awareness of their sense of identity, how others influence that perception, and the structures and processes formed by their understanding of established norms. When faced with a dilemma, they attempt to exert control through structure and artifacts; however, if confronted with personal boundary conditions, they must decide whether to risk their available resources by engaging in the encounter.

The system framework in Figure 5 above illustrates the interaction of these themes. The GET labels encapsulate participants' experiences during different phases of their decision-making process. Each label is accompanied by a descriptive summary statement that seeks to provide a richer expression of the GET. Where appropriate, each section includes findings and discussions relevant to the literature review and theoretical models presented in Chapter 2.

Figure 5

Framework for Experiencing Interpersonal Risk Decisions



General Observation on Selections

Each respondent was given the option of which experience to discuss first. In eight cases, the participants elected to explore their choice to engage in a difficult situation. One of the participants chose the avoidance example. In one case, the case selected initially appeared to be a

decision to engage, but on further examination, it was a better example of avoidance. This last example highlighted the complexity of identifying the appropriate “moment” of the experience and underscored the dynamic nature of the experiences.

The participants' choices to engage align with research on stress, specifically challenge and hinderance stress (Lepine, 2005). Eight participants selected examples where they felt they had overcome pressures and decided to act. This is consistent with challenge stress, in which stress is embraced, sometimes with enthusiasm and curiosity. By choosing these examples first, the participants demonstrated pride in overcoming challenging circumstances. The only instance of avoidance also aligns with existing research. Hindrance stress occurs when an insurmountable gap between resources and demands leads to withdrawal. These situations are viewed less positively than challenge conditions. In the cited example, the participant expressed regret regarding his actions.

Identity

The first theme identified how the participants' understanding and perceptions of their personal beliefs, standards, and confidence influenced their initial approach to encounters. These attributes form the individual's internal framework before facing a decision. The statement of meaning below offers a deeper expression of this GET.

They experienced a strong sense of duty and personal standards, which informed their preferences for independence and introversion, reflecting their understanding of self.

The GET outlines the internal standards or preferences identified by the participants and the challenges they encountered in overcoming these conditions when provided with an option.

Several participants positioned personal standards and duties as central to their self-identity. Anna explained, “It’s a feeling of these are my standards and these the things that I’m

going to accept in life, with my relationships, work, or other personal” (Anna (2) 34:42). Similarly, Michael noted, “I’m playing the long game and so if you wanna have a moment with me right now, whatever, I’ll I’ll just shrug that off. If you if you question my integrity, that’ll be a problem” (Michael (2) 37:22). George emphasized his standards for work ethic (George (3) 26:05), which he rooted in his motivation to be an “A student” (George (2) 27:47). Furthermore, this established his expectations toward others when he said, “We get paid to go a job and let’s see, let’s do our job” (George (2) 8:50). David focused his self-identity on a commitment to business objectives (David (2) 28:32). While these personal standards varied from fiscal accountability to academic performance, they seemed to set criteria for how the participants approached an encounter. Although concepts of justice and respect have been explored (Edmondson & Bransby, 2023), the broader role of personal standards does not appear in existing literature research on psychological safety and availability.

Participants wrestled to balance their commitment to these duties and standards with personal insecurities or characteristics. David, Bob, and Michael were reluctant to engage in their situations due to a self-image that was as comparatively weak in technical expertise. Bob said, “I don’t’ have the technical prowess to be able to speak logically or with much impact” (Bob (2) 41:49). Micheal admitted, “The more technical it is, the less I’m gonna speak up” (Michael (2) 35:14). These findings are consistent with research on uncertainty and stress generated from a lack of information (Lawrence & Lorsch, 1967; Kollenscher et al., 2009).

Michael was constrained by a reluctance to “annoy” his leaders, which drove him to solve the problem independently (Michael (3) 15:59). He described these tendencies as indicative of his nature as an introvert (Michael (2) 46:18). Similarly, Anna confessed that she preferred to resolve problems on her own and was “not a big let me go talk to someone about my

problem before I take action" (Anna (2) 27:22). The examples provided suggest that these conditions position how the participant approaches interpersonal risk event. They seemed largely self-imposed, stemming from insecurities (e.g., technical expertise), which aligns with the role of information in Foa & Foa (1974) and preferences for autonomy (Demerouti et al., 2011).

George felt constrained by his image as a bully, stating, "I'm a little bit of a bull in a China shop. I I just am and if when I interact with personalities who are China, I tend to. Crack them pretty, pretty fast" (George (2) 36:30). Research has investigated the effect of bullying on and from others (Adams et al., 1997; Arnetz et al., 2019) but not the role of a self-image as a bully.

In two instances, the participants identified distinct conditions influenced by their identity as females. Stacey was the only female in an active combat theater team of intelligence officers. She felt compelled to engage not only because she was confident in her position but also because she "wanted to make my point very well known that I was equal with everyone else as far as my capacity (Stacey (2) 34:15). Anna also believed her identity as a female affected how she engaged. While she specifically noted that she had not experienced direct discrimination in the past due to her identity (Anna (2) 34:07), she was cognizant of how her actions might contribute to the stereotype of emotional women in the workplace (Anna (2) 13:50). These concerns led her to restrain and carefully calculate her responses.

Research has suggested that trait gratitude, a persistent form derived from personality traits, fosters psychological availability and engagement (Waters, 2012; Fehr et al., 2017). However, the examined experiences did not explicitly support those findings. Anna and Rachel's response to their manager's support may have indicated state or transient gratitude. Assessing trait gratitude experiences over a more extended period would have been required.

The experiences explored with the participants revealed several attributes that established a set of parameters before facing a specific situation. General commitments to standards, preferences, and identity appeared to delineate relevant initial boundary conditions as the experience moved toward a decision point. Research has concentrated on external factors, such as the expectation of leader integrity (Palanski & Vogelgesang, 2011) and how it can influence levels of psychological safety and availability within the individual. A review of existing research indicated that perceptions of self-identity and the role these initial conditions might play in shaping how an individual approaches a risky encounter have been largely overlooked.

Reflections

The analysis of the interviews further revealed how the participants perceived their sense of self as influenced by their relationships with others. Similar to their concept of self-identity, the reflections of others within their identity impacted how they initially approached interpersonal risk situations. This GET is summarized in the statement of meaning below.

Influenced by formative past experiences and influential leaders, they described their decision-making as a careful balancing act between instinct, obligations and responsibilities to others with a desire to meet expectations.

The influences of others, from those of the past to the obligations in the present, shaped the participants' sense of identity. In some cases, these influences motivated action or led to withdrawal from the risk.

Several participants discussed how the influences of others from the past shaped their sense of self and affected their approach to risk-related situations. Anna, Richard, and Michael recalled childhood memories when describing their experiences. Anna remembered:

It triggered something in me that made me react very strongly and I think it goes back to my childhood experiences with my dad, who was a he was just a bully and I just don't do well with disrespect. I don't do well with treating people without, you know, professionalism (Anna (2) 4:440).

Michael described the environment in which he grew up as “very judgmental” (Michael (3) 3:57). Richard recalled, with some emotion, his experiences of being bullied as a child and how that led to a general reluctance to engage with aggressive personalities (Richard (2) 1:00:10). George drew heavily on the influence of his first manager, deriving his image of a strong and competent leader from “a man who is about 10 years older than me at the time... and he ran his shop like the military” (George (2) 20:55). Rachel expressed concern about being perceived as intimidating by junior members of her organization (Rachel (2) 13:35) and reflected on how this impacted her self-image and regulated her actions.

These findings align with research on implicit voice, which argued that individuals may be more influenced by presuppositions based on past experiences than current demonstrated behaviors (Deter & Edmondson, 2011). This is further supported by prior research on the role of self-consciousness in psychological safety (May et al., 2004). These previous experiences created *a priori* expectations or constraints as the participants approached their experiences.

Commitments to those in the present were highlighted as vital to their sense of self. Michael clearly stated, “Providing for my family is like the number one item, so I look at this, I look at any threat as very close to my core” (Michael (2) 15:13). He also mentioned, “I have a purpose for my career, and that is to provide for myself, my family; that so you know, I have a lifestyle” (Michael (2) 29:42). Similarly, Rachel acknowledged her responsibilities to her family as a significant factor when facing a situation (Rachel (2) 32:49). Stacey expanded on this notion

to include her team when she remarked, “My job is to keep the team as a family unit, treat each other as though we were family” (Stacey (3) 9:39). The participants were driven by their sense of commitment to others, which, in turn, seemed to provide a focus for their sense of purpose and identity. While the family-work dynamic is common in psychological availability research, it is usually depicted as a conflict (Wayne et al., 2007). These conditions served as a grounding force for approaching initial risk conditions for these participants.

Some observed how they relate to others during an experience. Richard explained that his sense of obligation to others was generalized. He expressed a compulsion to “do or say something. It's almost a natural inclination” to prevent “people think(ing) you are weak or stupid” (Richard (3) 9:28). David found value in empathizing with his counterparts' roles and obligations as he navigated his own experience, partly because he had held similar positions in the past (David (2) 8:52). Bob expressed confidence in the product team and his supervisor (Bob (3) 4:16). Still, he anticipated limitations to their abilities (Bob (2) 2:42), which could lead to unmet obligations and an increased workload for him. These findings align with research that examined the role of relationship networks and social capital in fostering resources and a willingness to engage (e.g., Carmeli & Gittell, 2009; May et al., 2004). However, these studies focused on the role of the relationships rather than how an individual might understand those roles as they approach the engagement.

Interestingly, Bob was the only interviewee who mentioned the “good friends at work,” describing a “safe environment for us to just kind of bleed some stuff out and potentially air some grievances and things like that if we need to so” (Bob (3) 28:05). Rachel discussed how she gained general levels of confidence and personal energy through prior positive interactions with her leaders. These types of energizing exchanges have been shown to boost personal energy and

improve psychological availability. (Kahn, 1993; Dutton, 2003; Quinn et al., 2012). However, these citations were uncommon in this research. Most examples were placed within contexts, including preferences, for private and independent discussions.

One group of participants recognized the influence of their South Asian culture on how they approached situations. Four participants had South Asian heritage, but only two acknowledged its effect on their sense of self. Adam explained, “With your South Indian Asian culture, you default to and then they know better than me. I think my culture let me down” (Adam (2) 14:39). In this instance, he was hesitant to voice his opinions to those in authority, despite being confident in his recommendations (Adam (2) 3:44). In contrast, Anna felt “comfortable in (her) skin” as a “brown woman” working within a technical field (Anna (3) 11:06). She developed this confidence in her skills and performance over time, enabling her to engage more boldly in challenging situations. The differences between these two experiences may be understood through their sense of authenticity (Rosso et al., 2010). While Anna felt affirmed by her prior experiences and current actions, Adam explicitly mentioned that he experienced low levels of authenticity (Adam (2) 57:30) driven by past challenges to operating in a Western environment where he was not fully accountable.

The influence of others on the participants' sense of self—ranging from the intimacy of family to a broader cultural context—shaped how they positioned themselves as they approached their experiences. They developed traits by either mimicking or avoiding characteristics from individuals in their past. Some discovered their identity through their roles related to family or team dynamics. By empathizing with the roles of others and understanding their obligations, they could engage in risky encounters. While several members acknowledged support from their

superiors, only one instance explicitly highlighted the advantages of peer support in fostering a safe work environment.

Norms

The role of organizational norms, defined by roles, policies, and processes, was a dominant theme among eight participants. The expectations of how these norms would operate influenced the participants' approaches to their events. The clarity and consistency of these norms would later impact the decisions made regarding engagement or avoidance. This GET is summarized in the statement of meaning below.

They found clarity and focus in organizational norms that were grounded in structured roles and processes that balanced respect for authority with the need for shared understanding.

Leader standards, corporate policies, and role authority defined formal norms. Factors such as the nature and duration of personal relationships and the context of an evolved corporate culture influenced informal norms.

Participants held expectations of leadership styles and norms before their events that influenced their actions. In line with Edmondson's findings (1999), known power distance inherent in their roles and organization drove caution as they approached new events. David and Bob encountered past situations where the communication of unilateral decisions led to their withdrawal with frustration. Matthew observed that while his leader "has a good style" (Matthew (2) 3:55), he does not offer opportunities for public discussion and debate (Matthew (2) 2:02). Knowing his preference constrained Matthew's willingness and opportunities to engage. The terse and unprofessional response from Anna's CFO broke an expected norm on how to communicate with subordinates and prompted her to act but also caused her significant personal

anguish (Anna (2) 5:33). In these examples of prohibitive voice (Liang et al., 2012), the participants encountered leadership that was directive and clear but did not allow or encourage contributions from employees. Limitations on employee voice seemed to diminish feelings of safety and restricted engagement.

Formal corporate policies were viewed positively for providing clarity and boundaries but negatively when perceived as controlling or retaliatory. Based on established corporate policies and defined roles, Anna expected protection from retaliation by reporting the incidents to Human Resources (Anna (2) 4:00). Similarly, Matthew anticipated protection from unauthorized investigations by the Human Resources Committee (Matthew (2) 27:32). For these policies to be effective, they also needed to be credible and consistently enforced. Matthew voiced his frustration, saying, "If you call something a policy but don't actually expect anyone to follow it, it's not a policy. At best, it's guidance" (Matthew (3) 18:41). In line with Binyamin and Carmeli. (2010), this research suggested that a formal and credible role of HRM policies and practices, enforced by leaders and HR practitioners, established clear expectations for these situations and provided the sought-after protection for the participant.

Some individuals struggled with the newly emerging policies and the implications of the evidence these policies produced. George faced challenges in adapting to the new policies and the norms of interacting with younger generations of employees and peers. He reminisced about earlier times when it was easier to joke and tease colleagues as a way of building relationships (George (2) 14:04). Matthew expressed concerns about the lasting consequences of past actions. He felt anxious when writing emails that served as tangible evidence of conversations and could be used against him in the future (Matthew (2) 29:12). George was worried about past evidence generated during 360-degree peer reviews and how such evidence might influence his managers'

perceptions, potentially impacting his career (George (2) 25:31). The distinction between positive and negative interpretations of policy roles may lie in their intent. In these experiences, policies were viewed positively when the aim was to control others and protect oneself. Conversely, they were perceived negatively when they intended to exert control over the participant in the present or future.

The participants' experiences varied in terms of role clarity. David and Bob felt empowered by their clearly defined roles as product managers. This role gave David a more "holistic view" of the problem to be solved (David (2) 15:35). Bob felt a sense of security after fifteen years on the product team (Bob (2) 4:36). Although Matthew's role was clearly outlined in the corporate job description, that clarity did not translate into the authority needed to accomplish his mission (Matthew (2) 9:56). Bob also expressed concern about the consequences of others' decisions or potential future failures. If others did not perform their roles adequately, as he anticipated, he would need to take on additional work and responsibility (Bob (2) 9:54). Conversely, as the oldest member of his peer group, George noted, "I trained most of them, and I and it's and it's possible that that's what rubs this person the wrong way" (George (2) 23:33). A misalignment of expectations and operating norms between generations created a gap in role responsibilities and caused tensions within the peer group. This analysis aligns with previous research (Edmondson, 1999; Hackman & Oldham, 1980), showing that role clarity and empowerment foster confidence to act.

The informal norms described by the participants enabled and constrained their willingness to engage in risk. Consistent with previous research (Wiesenfeld et al., 2001), peers and coworkers often conveyed cues about these norms. Rachel discussed the positive impacts of personal relationships beyond formal structures. She shared instances where, because of visible

expressions of vulnerability or encouragement, she felt at ease approaching others in challenging situations (Rachel (2) 41:21). Her experience aligns with studies on inclusive leadership (Woods et al., 2024), servant leadership (Schaubroeck et al., 2011), and openness (Detert & Burris, 2007).

In line with Social Learning Theory (Carmeli, 2007), David acknowledged that forming relationships and their inherent norms takes time. During this developmental period, individuals often feel uneasy about taking risks. George and Anna echoed concerns regarding the risks tied to underdeveloped relationships, suggesting they tend to hold back from engaging in the early stages. George stated, "If I am new to the group, Uh, I try really hard not to make I I keep quiet and I go in with, I'm just gonna listen" (George (2) 3:20). Anna shared her discomfort about speaking for a teammate because of her "unformed relationship" with her new manager (Anna (2) 42:24). Their reluctance to engage in early or unestablished relationships also corresponds with existing research on relationship work practices (Kozlowski & Doherty, 1989; Gibson & Gibbs, 2006). While established and trusted relationships appeared to foster engagement (Roberto, 2022), uncertainty resulted in risk avoidance within these group settings.

Matthew and Michael clearly described informal norms associated with decision-making rights and authority. The socio-historical context of their organization shaped the environments in which they operated. Matthew characterized the decision-making process as a "universal veto," where everyone's voice must be heard and carries authority" (Matthew (2) 16:09). This informal norm stemmed from the distributed accountability inherent in the informal power structure of the organizational model and the leadership's preferences, rather than from formal policies. Michael portrayed a more constructive atmosphere that was "potentially just a little too nice" (Michael (2) 5:41). This culture emerged from earlier times when decisions were made as

if “mom and pop got together around the counter and decided what they were going to do that day. And at that moment, everyone's equal” (Michael (2) 50:54). These instances stand in contrast to the formal HRM organizational structures mentioned earlier. While the specific conditions varied, both participants concurred that the ambiguity or uncertainty created by these informal norms complicated decision-making and hindered their engagement.

Formal and informal norms at the individual, group, and organizational levels were identified by nearly all participants as significant factors in approaching a risky situation. These norms provided the initial framework within which the participants assessed their conditions. The anticipated effectiveness of these norms appeared to be tied to their clarity and consistency and the intent behind them. When used to exert control, these norms hindered engagement; however, they encouraged it when applied to provide clarity or protection. Even well-defined norms could create ambiguous and ineffective conditions that might limit engagement when applied too broadly.

Dilemma

The first three themes describe the internal and external influences on individuals as they approach events. The fourth theme illustrates the conditions that create a dilemma about taking risks or avoiding them. This GET is summarized in the statement below.

When confronted with unexpected conditions or broken norms, they experienced internal conflict driven by uncertainty when deciding whether to act to protect themselves or to uphold fairness and integrity.

The examined experiences manifested dilemmas in two ways. They emerged from the situation's inherent uncertainty and ambiguity or from unforeseen circumstances and reactions that intensified uncertainty and increased perceived risk.

Matthew framed the first condition clearly when he stated, “It's always the marginal cases which create the psychological unsafety is the cases where you don't know if you're right or not” (Matthew (2) 55:04). Anna later echoed similar sentiments when she remarked that it was the “marginal that sit with you a little bit longer” (Anna (3) 3:06). Insufficient information bred uncertainty and increased engagement risks (Lawrence & Lorsch, 1967). Examples included David’s application design work with the security team and Adam’s high-risk recommendation regarding the product strategy for the new cloud services.

In other experiences, the dilemma arose from unfamiliar situations or unexpected reactions. Adam struggled with how to respond effectively because he “misjudged the whole environment and the culture” (Adam (2) 34:19). He was also stunned when senior leadership labeled his proposal as “the stupidest thing that we could ever do” (Adam (2) 9:50). Not only was he startled by this response, but his “shattered confidence” (Adam (2) 9:50) limited his ability to engage due to the power differentials between himself and the executives (Adam (2) 22:03). Richard recounted feelings of shock and surprise in both of his experiences. In the first instance, he was taken aback when a colleague spoke out against explicit instructions (Richard (2) 8:32). He faced a dilemma about whether to support his colleague or comply with the account leader's direction. Richard vividly described another situation where he felt paralyzed in his ability to respond. Despite the customer leader's reputation for direct feedback, Richard was so shaken by the use of vulgarity in a public setting that it left him unable to react (Richard (2) 38:28). Anna perceived what she considered unprofessional behavior from her CFO in response to the spending request. Such extreme unprofessionalism fostered an uncertain environment that heightened the risk. Lastly, Stacey encountered a dilemma arising from broken managerial norms

when a fellow manager criticized her employee (Stacey (2) 43:53). They all grappled with the unexpected uncertainty of their potential actions.

The role of uncertainty and, consequently, risk is well-researched in the literature on psychological safety (Edmondson, 1999; 2004a) and psychological availability (Li et al., 2022). The research method employed in this study offered deeper insights into the factors that contributed to uncertainties. These uncertainties arose when pre-existing notions of self, obligations, and norms were questioned or violated, prompting the participants to make decisions. The risk/reward conditions may have been better navigated had those notions not been compromised. However, if that were true, these experiences might have been less memorable and not chosen by the participants as examples.

Control

Participants described efforts to gain or regain control of their situation when facing dilemmas. Typically, they leveraged structures and artifacts to create clarity or supply missing information to minimize uncertainty and reduce risk. The statement of meaning below summarizes this GET.

They sought out a sense of control in navigating ambiguity through the use of structured artifacts and data-driven models to foster collaboration, manage risks, and create shared understanding.

Eight interviewees shared how they used data and information or created artifacts and structures to mitigate risks for themselves and others. As negotiations progressed, participants continuously assessed risks and rewards against their available resources. The final theme will explore the importance of resources further.

The availability and shared understanding of information were vital to how they navigated through their event. Many participants sought to gather data before the dilemma to pre-emptively establish control. David initially relied on “well-written user stories” to shape his early recommendations (David (2) 19:36). Adam conducted extensive market research while developing his recommendation for a new cloud offering (Adam (2) 22:03). Stacey expressed strong confidence in the comprehensive and differentiated data she collected to support her bold recommendation to relocate personnel within the region (Stacey (2) 5:27). Richard developed a data-driven rubric to evaluate candidates for offers (Richard (2) 50:25). Anna took pride in “looking at the data, the facts before I say yes or no” (Anna, (3) 5:33). This primary data fostered a sense of control that empowered their initial responses to the dilemma with confidence.

Participants were less likely to engage confidently when data was missing or disputed.

Michael explained:

I calculate based upon my confidence, and I know what I'm talking about. So, like if I've got experience and I can list off the the data points I'm much more inclined to speak up.

But if I'm just going off of my intuition. My sort of non data-driven experience, my gut if .I'm going more on my gut, it's I'm more inclined to be quiet (Michael (2) 23:09).

Stacey relied on her preference for data over engagement when she stated, “I’m typically a quiet individual, like I’m an analyst at heart” (Stacey (2) 23:14). Bob was “super quiet” in discussions when he lacked essential information. Their initial reaction to a lack of information was to limit their activity.

Some participants generated new data to gain or regain control of the dilemma through structure or artifacts. When negotiating with his security colleague about the new access design, David created diagrams illustrating the existing and new process flows to uncover hidden

processes (David (3) 19:44) and to demonstrate the necessary controls (David (2) 19:36). When challenged by others in the group, Stacey provided new and differentiated data to regain control over the recommendation to relocate operations within the theater (Stacey (3) 19:16). Some artifacts, particularly emails, seemed to cause significant stress for several participants. While conversations were considered “ephemera,” emails were viewed as physical evidence that could be used against them in the future (Matthew (3) 4:40). To mitigate this risk, Matthew sent a draft email to himself “about 80% of the time” to slow the process (Matthew (2) 53:31). Anna felt similar stress when drafting a reply email to her CFO, taking defined measures to ensure her “email was very logic-based” (Anna (2) 13:50). The creation of new artifacts to gain control over uncertain conditions or reactions was a recurring theme in several experiences but approached with caution at times.

Efforts to exert control were made by regulating where and how conflict was revealed. Multiple experiences indicated a strong preference for addressing disagreements in private settings. Matthew emphasized his leader’s expectations regarding conflict when he stated, “He’s also not a guy who’s a super fan of being disagreed with publicly, right... He doesn’t mind being disagreed with. That’s all good. You need to do that privately” (Matthew (3) 30:14). In David’s first experience, the team leader separated him and his security peer into a different room to isolate the conversation and encourage more open dialogue (David (3) 23:14). Michael expressed his preference by saying, “I’m perfectly comfortable having that conversation with my team. I’m comfortable having that conversation one-on-one with my leader, but not in a group. Not with the whole league team” (Michael (2) 9:54). Anna believed that disagreements, particularly those involving disrespect, should be addressed in a “one-on-one conversation” instead of being

publicly aired (Anna (3) 7:58). By moving the conversation to a private setting, participants aimed to control exposure and mitigate risk.

This finding may present a challenge to promoting psychological safety and availability. Both conditions are influenced by prior experiences and familiarity (Roberto, 2022) and strong intra-team relationships (Gu et al., 2013). Private settings may impede the development of positive states for everyone if the conflict and resolution stay hidden from the group's view.

The control process is dynamic and repetitive, continuously interacting with available resources and personal boundary conditions. Participants expend or risk resources based on personal boundary conditions that influence their decisions to engage or disengage. This evaluation process may occur nearly instantaneously or over an extended period. Anna made her decision within fifteen minutes of receiving the CFO's email (Anna (2) 27:29). David's experience was intended to last an hour but extended into a full day of discussion and exchange (David (2) 18:38). George formulated his position over several months of unproductive conversations with the volunteer committee (George (2) 9:11). Matthew reconsidered his dilemma regarding the same underperforming employee on two occasions, reflecting on how he should draft the emails and interact with the employee, HR, and unofficial committees over many hours (Matthew (2) 29:12). Efforts to mitigate the conditions and risks were repeated throughout these experiences, though they differed in duration and frequency.

Boundaries

When faced with their dilemmas, the participants outlined the necessary conditions for acting or avoiding. These conditions varied throughout their experiences, shifting between engagement and withdrawal while continuously evaluating the resources available to them. The

difference between the Boundaries and Identity or Reflections themes lies in their actualization rather than initial perception. The statement of meaning below summarizes this GET.

When faced with a breach of personal or professional standards, they encountered a tipping point and felt compelled to go beyond their usual boundaries, driven by a sense of duty to themselves and others.

The boundary condition seemed to interact with a desire to manage risk and the resources the individual had available to spend “at the moment.” Matthew framed the decision as a question, “Is this a hill I want to claim I will die on?” (Matthew (2)) 35:35).

Participants were motivated to engage when personal boundaries were approached or crossed. Conditions included personal integrity, respect, commitment to business objectives, and obligations to others. Anna felt personally humiliated by the initial response from the CFO, stating, “I feel humiliated, right? So it was about me. Very much so it was. I feel you disrespected me. You humiliated me.” (Anna (2) 28:49). Stacey was also motivated by a demand for respect from her team members. She said, “I wanted to make my point very well known that I was equal with everyone else as far as my capacity” (Stacey (2) 34:15). Bob believed he had a responsibility to broader business objectives. He was “there monitoring it, providing feedback, and if needed be a voice to pull the plug on the whole thing if it, if it really turned out badly” (Bob (2) 7:03). David felt compelled to engage “because, at the end of the day, you need to make a commitment to yourself based on the business” (David 2 (22:26)). In these experiences, the participants chose to act because of the commitments they made to themselves or their company. Failure to fulfill those commitments would be a breach of personal boundaries.

A significant boundary condition cited in the interviews involved personal commitments to individuals, distinct from a general commitment to a third party like their company. Rachel

perceived engagement as a duty to others because she “wanted to make sure that I could go back and provide the appropriate coaching” (Rachel (2) 8:57) and later explained, “I feel that if I have that question, someone else probably has it” (Rachel (2) 36:01). Richard felt driven to speak up out of loyalty to his colleague who had been “in the trenches” with him (Richard (2) 14:44) and had “come through for me on occasions in the past” (Richard (2) 20:20). Stacey viewed her commitment to others as a catalyst for action. Considering that an incorrect decision regarding personnel placement in a wartime theater would have “put lives (that she knew personally) in jeopardy” (Stacey (2) 21:07), she believed it was her “responsibility” to act (Stacey (2) 58:14). In line with other research (Scheper et al., 2008; Bstieler & Hemmert, 2010), the intimacy of the personal obligation seemed to create explicit boundary conditions across all of the experiences examined.

In some cases, boundaries were not crossed, or there were not enough resources available, leading the participants to disengage. Although confident in his stance, Adam’s choice not to defend his position stemmed from the perceived power gap between himself and the executive committee (Adam (2) 3:44). Richard refrained from speaking up to the customer leader, who acted unprofessionally due to the leader’s power to remove him from the program (Richard (3) 11:38). George often did not participate for fear of being labeled a “bully” (George (1) 19:58). Matthew withheld his input unless he believed it added “value” that was “likely to lead to a better outcome than if I don’t say anything” (Matthew (2) 25:30). Participants failed to engage in situations where they could not overcome boundaries based on power, fear, or effort. These results are consistent with other research into the role of power and fear in developing psychological safety (Appelbaum et al., 2016; Kahn, 1990).

The dilemma drove the participants to engage in a cycle of negotiations to establish a balance between personal boundaries, control, and resources to evaluate the risks associated with their involvement. Personalized boundaries, while occasionally flexible, delineated the parameters that elicited engagement. The existence of clear boundaries often led to quick responses. Conversely, there were instances where participants broadened their willingness to engage by adjusting or adapting the parameters of their boundaries.

Resources

While attempting to exert control and manage boundary conditions, individuals appeared to continuously assess the risks against their available resources. This research defined resources as “anything perceived by the individual to help attain his or her goals” (Halbesleben et al., 2014, p.5). Participants weighed the potential loss of current resources against the gain of future resources as they considered their willingness to engage. This final GET is summarized in the statement of meaning below.

They experienced tension between self-preservation and duty to others driven by a fear of lasting reputational damage and potential career risks, possibly eased by an awareness of their market value and a history of successful transitions

Although some resources may appear similar to those listed in Norms, this theme emphasizes their actualized rather than preconceived notions. For instance, did the prescribed HR policies perform as anticipated? The findings were analyzed within the baseline resource framework in Figure 1 of Chapter 2. This framework categorizes resources into five levels, reflecting the individual's degree of control over them. Macro resources originate from the organization, meso-resources come from others in the workplace, and micro-resources arise from home, family, or self.

Recalling the subjective nature of Lee et al.'s (2019) concept of a resource, the valuation of resources in this study varied based on the circumstances individuals experienced as they approached and navigated the encounter. Different experiences from the same participants may have highlighted a different series of resources. In some cases, the absence of a resource or its unequal distribution was significant. After reviewing the analysis of the role of resources, a revised framework is proposed to address the identified gaps. The revised framework also identifies the relative intensity of the resources as expressed by the participants.

Macro-resources

The highest category is the macro-resource of organizational resources. This category encompasses organizational climate and culture, rewards and recognition, learning and development opportunities, formal policies and services, and leadership (Lee et al., 2019).

Four interviewees identified climate and culture as significant factors in their experiences. Employees perceive culture as the shared values or assumptions within an organization transmitted to successive generations (Schein, 2017). Adam referred to his "South Indian culture" as a hindrance, noting it "let him down" by limiting his willingness to speak up to the investment committee and defend his position (Adam (2) 14:39). Stacey experienced a male-dominated culture characterized by "my way or the highway" discussions (Stacey (2) 31:37). Michael described his organizational culture as rooted in its historical "mom and pop" origins, where one could "go talk to anybody" (Michael (2) 50:54). However, Michael felt this organizational culture hindered effective decision-making and accountability. Matthew depicted his culture in absolutes, stating, "In this environment, if you would not die on that hill, don't even address the problem at all" (Matthew (2) 1:52). While he recognized the value of employee voice, the extreme democratization of decision-making in their culture proved ineffective and

stifling (Matthew (2) 16:49). In all four cases, organizational resources were described as constraining or negatively influencing their experiences.

Participants seldom cited rewards and recognition as influences on their decisions. Rewards are extrinsic monetary incentives, while recognition is an intrinsic non-monetary indicator of employee performance (Lee et al., 2019). The value of this resource may also be established through the clarity of pre-defined targets or expectations rather than solely their actual attainment. For example, understanding a personalized incentive for achieving an annual sales target differs from the actual payment for results. Matthew noted the distorting impact of how financial targets are created in his company. He stated:

And so, what has happened is that the operating stands up with a lot of constraints around indirect rates and funding methods and we need the two entities to have a lot of direct costs because the more they spend, the more we can spend while keeping the indirect rate flat. So, the whole point is their costs are the denominator. Our costs are the numerator, so the only way we can spend more is if they spend more. (Matthew (2) 34:35).

For Matthew, this structure created misguided incentives that encouraged overspending and inefficiency to secure a larger budget. When faced with his dilemma, Richard recognized the pressure to meet quotas and utilization goals but chose not to prioritize those in his work decisions. Prior research has produced mixed results regarding the relationship between rewards and engagement (Farndal & Murrer, 2015; Sarti, 2014). The framework limits an organizational resource to that which the organization can create or implement to influence employee behaviors. It does not consider how employees value that resource, such as pay incentives, once received. With that in mind, realized organizational rewards and incentives did not seem to impact the

participants' experiences significantly. However, the role of cumulative realized rewards, which did affect engagement, will be discussed in a later sub-section.

Only one interviewee explicitly identified learning and development opportunities as a factor in his decision. George recalled the negative impact of previous training on his willingness to engage. He was compelled to undergo remedial training several times due to employee feedback to leadership about his management and communication style. He expressed feeling "embarrassed," and as a result, he believed taking risks in decision-making was not worth it. He stated, "It's not worth being right to pay that price, or it's not worth that price to be right for a short period of time" (George 2:39:06). While prior research has found a positive relationship between learning and development opportunities (Weigl et al., 2014), none of the other participants mentioned the potential for new formal learning and development opportunities as a factor.

Formal policies were considered a valuable resource on multiple occasions, but they also had the potential for negative consequences. The most commonly referenced were Human Resource (HR) policies and programs. Matthew and Anna relied on established HR policies for protection and support. As noted in Matthew's situation, the HR team effectively defended him from an unauthorized investigation by the DEI committee. However, Matthew felt that the HR standards in his organization were stricter than those at other organizations where he had worked. Overall, he did not feel supported when trying to hold an employee accountable, stating, "You need to have criminal trial-level proof before they would help you" (Matthew (3) 6:20). Furthermore, he remarked, "The culture is the staff can do anything they want, and the managers have no tools to provide corrective measures" (Matthew (3) 6:20). Anna felt the need to involve HR in her communications with her CFO to protect herself in case of retaliation. Anna received

effective assistance when her HR partner directly engaged with the CFO during the incident to explain, “This is not what we want to see from our senior leaders” (Anna (2) 4:00). Rachel was apprehensive about her participation in an HR investigation. She recalled feeling anxious about the possibility of any derogatory remarks about a senior executive becoming public (Rachel (2) 16:09), which did not appear to have subsequently occurred.

Generally, HR policies are positively related to engagement (Chambel et al., 2016). In these scenarios, the participant's perceptions of the role of formal policies appeared to be directly influenced by whether the policy actually protected them or was used against them by another, as well as the consistency and credibility with which the HR teams enforced the policies.

The role of pre-experience leadership norms was explored in the third GET. In this theme, leadership involved guiding others to achieve collective goals within the ongoing experience. The leadership styles during the experience were noted on several occasions. Anna quickly sought and obtained support from her manager when addressing disparaging communication from the CFO (Anna (2) 4:00). She leveraged his formal positional authority to engage directly with the CFO, reducing the power distance and rallying other parties for support. In Richard's hiring decision example, the manager had formally delegated authority to the hiring panel but retracted it when the results conflicted with his preferences (Richard (2) 50:25). The difference between these experiences appears to lie in the efficacy and credibility of the leaders' actions. Consistent with prior findings (Hirak et al. (2012)), leaders who were incapable or unwilling to provide support when needed were not regarded as effective resources by the participants. These findings also align with prior research regarding toxic handlers, who work to help absorb or redirect distress (Frost, 2003).

These experiences illustrate that organizational resources were regarded with a predominantly negative perception rather than a positive one. While certain instances highlighted the advantages of policy enforcement and clear incentives, the majority characterized organizational resources as obstacles. The lack of easily accessible resources constrained the actions of numerous participants. A significant number of individuals felt restricted by the prevailing organizational culture. Managers lacking sufficient knowledge or credibility to help their employees were considered ineffective. Conversely, when organizational resources were recognized for their constructive influence, they were perceived as aligning with preconceptions of norms and were visibly supportive in their enforcement.

Meso-Resources

Mid-tier resources consist of social and job resources. Social resources are characterized by relationships, signals, and support that individuals receive from supervisors and colleagues on a personal level and within teams at the group level. Job resources pertain to the characteristics that can help mitigate job demands and their associated costs while motivating individuals toward goals and performance (Lee et al., 2019).

In these examples, the social resources defined by supporting actions from supervisors appeared weakest when the power distance was greatest. After receiving negative signals from the executive committee, Adam's manager provided minimal support, including suggesting an alternative recommendation (Adam (2) 28:15). Adam then quickly withdrew from the engagement because, although the manager tried his best, he was ineffective (Adam (2) 14:39) and the committee held power (Adam (2) 3:44). While Matthew accepted the authority associated with his title, he also seemed to regard his supervisory support as perfunctory. He said:

I have the President's full support and all the resources I could ever want at my disposal to centralize IT to the extent that I can personally convince all 1,400 people in the organization one by one that that's a good idea and if a single one of them objects, then we're not doing it (Matthew (2) 13:50).

Stacey described how her manager allowed one of her employees to be unjustifiably criticized and targeted through his inaction and tacit support of another favored peer manager (Stacey (2) 50:40). When describing the support he received from his manager, Bob stated, “I don’t think my boss even knows half of what I really do on a daily basis” (Bob (2) 31:10). Although the customer leader was not Richard’s formal manager, he held significant influence over Richard’s future on the project. This may have further increased the power distance, as Richard had fewer formal options for recourse when the leader misbehaved. To these participants, their managers were absent or ineffective at challenging power gaps in these situations.

In contrast, Bob received strong support from his supervisor during his transition from the product department to IT. “I was kind of a protected asset in a way—they didn’t want to lose me” (Bob (2) 9:13). Anna felt empowered to move forward due to direct engagement from her manager to her personally, despite the presence of a more powerful CFO. The diversity of these experiences aligns with prior research (Menguc et al., 2013), which found weak support for the relationship between supervisor support and engagement. As shown in previous studies (e.g., Appelbaum et al., 2016), analyzing these experiences suggests that some of the differences may stem from the strength and visibility of managerial support relative to power distance.

Support from colleagues or peers was mentioned several times but in various forms. Adam relied on his mentor to validate his approach to managing an underperforming employee

(Adam (3) 15:40). Anna received the “push that I needed” from her colleague to respond to the CFO’s email (Anna (2) 13:50). Bob was able to process his frustrations and gain energy from discussing business issues with former peers (Bob (3) 28:05). George was the only participant who described the negative aspects of peer support. There was conflict between George and his peer managers, many of whom he had trained. He characterized them as “having an authority complex” (George (2) 10:31) and noted that they struggled with conflict resolution (George (2) 23:05).

These findings align with previous research on team support (Plutt et al., 2014) and team climate (Farndale & Murrer, 2015). These examples also correspond with research on the effects of energizing interpersonal interactions and their impact on psychological availability (Kahn & Heaphy, 2013). This analysis indicates that the difference between George’s experience and those of the others may stem from the direction of the support provided and whether it aligned with or conflicted with the participant’s preferences or objectives.

Five participants spoke positively about job resources, while three raised concerns. Job resources encompass skill variety, task identity, task significance, autonomy, and feedback (Lee et al., 2019). David mentioned craftsmanship and challenge as aspects of skill variety when discussing his work on the security solution (David (2) 16:06), and Adam highlighted the depth of the challenge and research he undertook to develop his proposal ((3) 3:44). Anna illustrated her task identity by stating, “I pride myself in looking at the data, the facts before I say yes or no. I don't want to spend money egregiously for like when I spend money, I'm very thoughtful about it” (Anna (2) 25:33). Stacey provided the clearest example of task significance by emphasizing the importance of her recommendation, which could “put lives in jeopardy” (Stacey (2) 21:07). Michael was motivated by the opportunity to “craft and create” solutions to complex problems.

He confidently recounted how a former manager once said, “I can put you in any situation. You come out smelling like a rose, and I said, that is a skill. You make it sound like it's a defect. It's not. It's a skill” (Michael (3) 21:10). The participants’ willingness to engage seemed to increase with their sense of autonomy, task identification, and skill variety.

The job resource with negative connotations involved employee feedback or a lack of autonomy. Rachel and George, who worked at the same organization, described the effects of negative evaluations. Rachel was criticized for her attempts to hold an employee accountable. Although she felt justified, she acknowledged the flaw in her approach and spoke about it with a tone of regret (Rachel (2) 28:28). George confessed he was hesitant to share his opinions or engage in potential conflict due to previous negative peer feedback, which he perceived as unfairly affecting his annual performance reviews and future career prospects (George (2) 26:40). George’s experience aligned with previous research on the effects of ostracism and levels of psychological availability (Liu et al., 2021). Richard’s autonomy was compromised when the decision regarding an offer, based on objective criteria, was overridden by his manager's personal preferences (Richard (2) 51:07). In these instances, the negativity seems to stem from the participant's sense of personal justice and fairness rather than the structural aspects of resources, such as the feedback process. When combined, the positive and negative perceptions of job resources appear to influence an employee’s willingness to engage in risky situations, as previously found in research (Keating & Heslin, 2015; Quinones et al., 2013).

Micro-resources

The final tier of resources consists of home and personal resources. Home resources arise from family capital and family support. These reflect the degree to which assistance is gained or lost through the strength of relationships within the home and family, including elements of

work-life balance. Personal resources comprise the cognitive, psychological, physical, and career resources specific to and found within the individual.

When mentioned, home resources were identified as barriers to engaging in risk. Adam felt that home life “zapped” his personal energy, which could have otherwise fostered greater engagement and advancement at work (Adam (2) 47:49). Rachel remarked that “my current life situation...brings more stress into the workplace” (Rachel (2) 51:25). George depended on his wife to help him navigate his desire for control, which had made him “much more risk-averse” (George (2) 50:25), an ineffective holding environment in this case (Kahn & Heaphy, 2013). Consistent with previous research indicating a link between home resources and willingness to engage (Tement, 2014), the negative home resources in this study did not seem to encourage engagement; instead, they appeared to promote greater risk aversion behaviors.

Only two participants mentioned work-life balance. Bob appreciated the flexibility and autonomy of his ability to work from home (Bob (3) 19:03). Stacey recently left her IT job when she was asked to relocate to another state and return to the office. However, she accepted this decision because she had prepared financially (Stacey (3) 7:03). While work-life balance has been shown to enhance levels of psychological availability (Russo et al., 2015), it was not frequently mentioned in these examples.

Cognitive personal resources refer to the intellectual capabilities, knowledge, and skills an individual acquires through learning and development (Lee et al., 2019). Seven participants earned a master's degree, not necessarily in their technical fields, while three had attended college but did not complete their degrees. There was no apparent correlation between the participants' education and role levels. Two participants, Michael and Adam, specifically mentioned their education or training. Adam highlighted his high level of performance during his

master's program. Achieving high grades in school was a common theme among several participants and was cited as a motivating factor behind their drive to excel at work.

Regardless of their educational background, many participants emphasized the knowledge and skills they accumulated over decades of experience. For example, Michael transitioned from a degree in theatre management to leading a large technology team. He characterized his intellectual capabilities as a “logic engine” alongside his work experience, which helped him overcome his irrational fear of being fired (Michael (3) 15:13). David remarked, “After 30 years you, you learn that it's a natural instinct that you have to do” (David (3) 26:56). Bob achieved a special status within the company due to his fifteen years of experience with his product (2) 7:03). George contrasted the expertise he developed over several decades in his field with that of a younger generation that has only four years of experience (George (2) 43:29). Consistent with prior research on personal knowledge and skills (Nahrgang et al., 2014), participants gained the confidence to engage in risky situations through their developed skills, knowledge, and innate intelligence capabilities.

Psychological resources are the mental and emotional assets that individuals depend on when engaging in various activities. These resources include psychological capital, trait competitiveness, emotional intelligence, and compassion (Lee et al., 2019). Psychological capital is comprised of self-efficacy (confidence), optimism, resilience, and hope (Luthans et al., 2007). Emotional intelligence refers to the ability to manage one's emotions and includes motivation, empathy, and the ability to influence others effectively (Goleman, 2021).

There were several instances of self-regulated emotions, some accompanied by a tone of regret. Richard and Adam refrained from defending their positions when faced with unprofessional conduct, reflecting on their decisions regretfully. George acknowledged his

struggles in regulating his emotions, using the terms “mad” (George (2) 15:56) and “angry” (George (2) 17:22) to describe various incidents. In contrast, Matthew expressed his pragmatic approach to being challenged by the DEI committee, later noting his acceptance of disagreement by saying:

I am not a person who believes it's important for me to agree with every decision in a large organization because there are a lot of decisions made in large organizations, and I know that everyone doesn't agree with every decision I make. So I should not expect I'm going to agree with every decision they make. So when it's something that I don't necessarily agree with, I will ask myself again, like, is it a hill I need to die on like you know?” (Matthew (2) 38:33).

Michael admitted that he is “OK not pleasing you” when confronting challenging situations or individuals (Michael (2) 7:44).

Based on these experiences, participants who struggled to manage their emotions or expressed more significant regret about their ability to control them held lower role levels than others. Participants in senior roles described more controlled processes for handling risky encounters. Consistent with other research (Kim & Kang, 2016), the participants' ability to manage their emotional states and responses also influenced their willingness to engage in these situations.

Confidence frequently emerged as a key trait within psychological capital. David believed in his ability to improve the application while still adhering to security parameters (David (2) 8:51). Adam was initially very self-assured in his research (Adam (2) 19:59). Stacey displayed confidence in her recommendations despite facing significant challenges from her team and the prevailing legacy culture (Stacey (2) 12:26). Richard and George demonstrated a

lack of confidence in their roles, likely influenced by past failures, which may indicate lower levels of resilience. None of the participants expressed or exhibited high levels of optimism or hope. Compassion was evident in Stacey's commitment to protecting human life (Stacey (2) 21:07) and treating her team as family (Stacey (3) 29:00), while Anna voiced her desire to support the underdog (Anna (3) 11:06). Several experiences highlighted the participants' ability to influence others, such as Bob's role as a "spanner" (Schulte et al., 2012) with a challenging teammate (Bob (2) 45:00). A variety of psychological resources were mentioned by nearly all participants as contributing to their willingness to engage; however, the limited number of experiences explored may have left some aspects unexamined.

Physical resources refer to the energy or health assets necessary for performing work (Lee et al., 2019). Although the IT industry is generally not physically demanding, it can require significant personal energy and stamina, particularly during extended incident recovery periods or complex projects. For instance, Adam remarked, "I poured a lot of energy, umm, into that. I was working almost 16 hours a day for about a year and a half, just galvanizing everybody to the cause" (Adam (2) 3:44). Similarly, Stacey highlighted the challenging conditions of working in remote desert locations and how these affected her health and energy levels (Stacey (2) 12:26). Michael summarized his views on physical resources by stating, "I will outrun you. That's what I will do. I might not be smarter, but I will work harder than you" (Michael (2) 14:13). While physical resources were evident in several examples, nobody cited them as performance constraints. On the contrary, challenges to personal energy and physical conditions were seen as badges of honor, demonstrating dedication to their efforts. This aligns with research on challenge stress (Lepine, 2005), which suggests that employees gain energy and enthusiasm when facing obstacles.

Career resources include an individual's work experience outcomes (e.g., rank and seniority) and career planning, which likely assumed a different role with this sample compared to earlier career-stage employees. None of the participants identified future growth as a primary influence. On the contrary, several participants admitted they no longer pursued career advancement, including Anna, Matthew, Michael, Rachel, and Stacey. Anna expressed her sentiments, stating, "I just want to learn. I want to grow, and more than anything now I want to be an advocate for others. I want to be a mentor. I want to help people" (Anna (2) 49:15). Rachel acknowledged that moving to a higher position might increase her risk of being laid off (Rachel (2) 37:59). Matthew was willing to consider a lower-status role, as he had seen others do, to reduce the stress in his remaining working years (Matthew (2) 51:15). The dynamics of career planning and the motivations driving the participants shifted with less career time remaining. While all wanted to stay employed, none of their experiences indicated a strong desire to advance their careers in terms of position or level. Many were motivated by a desire to learn and help others achieve what they had accomplished.

Personal resources appeared to encourage a willingness to participate. Psychological and cognitive resources were frequently emphasized as assets that participants drew upon during tough decisions and situations. The experience gained from years of working in various environments enabled those interviewed to adapt, learn, and contribute effectively. Home resources were generally regarded as a negative drain on capacities. Physical resources received less emphasis than other types, possibly due to a focus on specific rather than extended experiences, yet the intriguing potential of challenge stress was identified. Lastly, career resources were viewed as less significant given the interviewees' career stages. Although all

personal resources were displayed, those closest to the individual's control were most frequently mentioned.

Enhanced Resource Model

Although the framework developed by Lee et al. (2019) was based on a thorough assessment of existing HRD literature, this research indicates that several gaps remain. The resources discussed in the framework are "what employees needed to do their work on a daily basis, without being more specific" (Lee et al., 2019, p. 14). Organizational resources provide clarity and structure, social resources offer support, and personal resources encompass internal aspects of the individual. Referring to the functional definition of resources presented in Chapter 1 and Foa and Foa's (1974) Social Resource Theory outlined in Chapter 3, this study suggests that several additional resources should be considered.

The experiences analyzed through the resource framework have addressed several of Foa and Foa's (1974) resources. Services and information were evaluated from the macro-tier of organizational resources and the meso-tier as social and informational resources. The exchange of physical goods was not an aspect of the examined experiences. Two additional resources are proposed.

Reputation

The aforementioned Social Resource Theory presents the status of the individual as a particularistic resource. Status is "an evaluative judgment that conveys prestige, regard, or esteem" (Foa & Foa, 1976). It can be further categorized into symbols of human dignity, respect, concrete ranking, and societal hierarchy (Binning & Huo, 2012). Anna and Stacey highlighted human dignity as a motivating factor for their engagement, viewing it as an ideal rather than a commodity to be exchanged. Some individuals discussed rankings when describing power

differentials, such as Adam's relationship with the investment committee or Michael's ties to his CEO's decision-making preferences. While status was mentioned in several forms, reputation was often cited as a resource to develop, retain, and avoid losing.

In this study, reputation refers to the perception that an agent or the public holds of another individual, based on past actions and relevant personal characteristics, to predict future behavior and assist in selecting cooperation partners. It serves as a means to reduce information asymmetries and manage risks and complexities (Braga et al., 2018; Zinko et al., 2007).

Reputation differs from status in several ways. First, as noted above, status is a broader concept that includes formal rankings and hierarchies. Second, unlike reputation, it can be established by fiat, such as the Universal Declaration of Human Rights or the Geneva Conventions (Binning & Hou, 2012). The closest related concept may be respect, a symbolic status distributed or withheld by individuals but not necessarily constrained by organizational structure (Binning & Hou, 2012). However, respect implies a positive attribute, whereas reputation may also include negative connotations. Reputation serves as a resource that an individual can cultivate for its functional, social, and expressive values (Eisenegger, 2009), which exist within the perception of others.

Reputation offers a proposed utility in fulfilling individuals' needs for self-esteem and belonging, enabling them to gain rewards and signal meaningful information to others (Zinko & Rubin, 2015). Participants perceived their reputations as potentially the most valuable resource in their expressed experiences. When asked about the risks associated with taking or avoiding action, several participants initially indicated their jobs were at risk. David, Adam, and Bob all highlighted a direct threat to their employment due to not meeting expectations. However, deeper discussions during the interviews revealed the crucial role of reputation.

None of the participants provided examples of being directly threatened with termination. Instead, negative consequences would likely be incremental, driven by damage to the reputations they had built over their careers. They believed that reputational harm increased the future risk of job termination or career limitations. Stacey stated, “It wouldn’t necessarily be the end, quote-unquote, of my career. It would be the end of my reputation” (Stacey (2) 27:42). Anna felt compelled to protect her integrity by acting (Anna (2) 4:00). Richard struggled to balance his reputation for loyalty with explicit directives from the account team not to sell to the customer (Richard (2) 11:53). George and Rachel held reputations as bullies that were assigned to them by others.

Matthew viewed reputation differently than the other members of the sample. For him, reputation within his organization did not seem to influence outcomes. While he believed he had a reputation for “only weighing in when... having something smart to say” (Matthew (2) 3:55), he felt that reputation held little significance in his organization. He stated, “There are people in incredibly high positions that had had horrible reputations for years” (Matthew (2) 34:04). However, he recognized that his current organization was an anomaly, unlike any of the other thirteen he had worked for throughout his career.

The high value placed on reputation by the participants may result from their late-stage career status. This investigation indicated that the older population interviewed saw worth in the reputation they earned and built over decades of experience, marked by its successes and failures. While younger generations likely valued their reputation as well, they have not yet had the opportunity to gain the same level or type of reputation. Several participants expressed this view when reflecting on their younger selves. This finding aligns with the previously discussed Conservation of Resource (CoR) theory (Hobfoll, 1989). Like Tversky & Kahneman (1992),

CoR posits that the potential for loss, in this case, reputational value, weighs more heavily than an actual loss or the desire to gain or regain resources. For late-stage career professionals, it appeared they prioritized maintaining reputation over its development or advancement (e.g., accepting limits on career potential).

Although reputation is held at the individual level and contributes to self-esteem, the participants viewed it as a social resource because its value depends on the involvement and perceptions of others. Consequently, this research suggests that reputations be incorporated into the framework as a social resource in the meso-tier.

Net Wealth

The resource framework overlooks the importance of net wealth resources. Participants in this research conveyed a broad interpretation of financial resources, which included the current value of salaries and incentives—regarded as organizational resources—and accumulated wealth from retirement savings, property, and other assets. Net wealth, defined as the difference between assets and liabilities, seemed to hold more significance than the immediate organizational resource of compensation for work performed. Immediate compensation partially aligns with Foa and Foa's general resource of money, described as "any coin, currency, or token that has some standard unit of exchange value" (Foa & Foa, 1976). However, by considering the held value of all assets in relation to obligations, participants valued this resource differently than the functional immediacy of exchange might imply.

The research sample was chosen based on proximity to retirement. Individuals aged 50 to 60 may have built substantial net wealth. Still, they may not yet possess enough savings to retire according to their expectations, especially if they lose their jobs and need to replace their income. George considered a change to be a dramatic event, remarking, "I'm in the period of my

life, career-wise, that if anything major happens, my retirement is destroyed” (George (2) 42:06). Michael observed, “(I’m) financially not quite ready to retire like I could make it work. But. Oh, I’d like a little more money stacked up so that I can have some fun” (Michael (2) 18:07). Rachel confirmed her financial worries when asked if her financial situation related to her age affected her willingness to speak up (Rachel (2) 40:59). Some individuals perceived the risk of engagement to be greater than for others as they were considered “an expensive resource” (Michael (2) 20:35). Bob faced this comparative value risk when competing for a recent job that ultimately went to a less expensive, younger candidate (Bob (2) 10:03).

Some participants were less concerned about their financial resources. Matthew, closest to retirement among all the interviewees, was willing to continue working within his challenging organizational culture while avoiding risk. When asked why, he replied:

Honestly, it's because they pay me a crap ton of money, which I really like. I do. I have to say that I love my house. I like living here. I have. I can see the mountains right now, right? So I in my wonderful house with my wonderful view of the mountains, with my wonderful salary, my 10 to 5 retirement match, which is frigging incredible. (Matthew (2) 14:44).

Matthew was also willing to take on a lower-ranking, lower-paying replacement role for the remainder of his working career, which came with less stress (Matthew (2) 51:15). When confronted with her situation, Anna evaluated her current savings and accumulated assets after sending her first reply to the CFO. She explained:

I thought about that a lot. I was able to say I don't care about the outcome because of where I'm at in my career, my network, and you know where my kids are, and college has been saved for, and all that, right?" (Anna (2) 37:36).

However, Anna also noted that she believed it would be easy to secure a replacement position. When asked about relocating, Stacey explained why she left her cloud company. She felt “confident that (she) could go find a job somewhere else,” but likely not at the same salary level (Stacey (2) 12:05).

Role level did not appear to be a distinguishing factor. Individuals from both the executive and individual contributor ranks were present in each state. The difference in risk tolerance between these two groups seemed to be shaped by an understanding of their perceived market value. Matthew, Stacey, Anna, and Michael felt confident in their market value due to previous successful moves or insights from professional networks and colleagues. In contrast, George, Rachel, and Richard were less informed and voiced greater concern. When the financial risk appeared less critical, the ease of finding a new job or willingness to lower expectations became crucial. Similarly, this relates to the previously mentioned references regarding CoR theory concerning loss avoidance. This also aligns with the function of information in SRT.

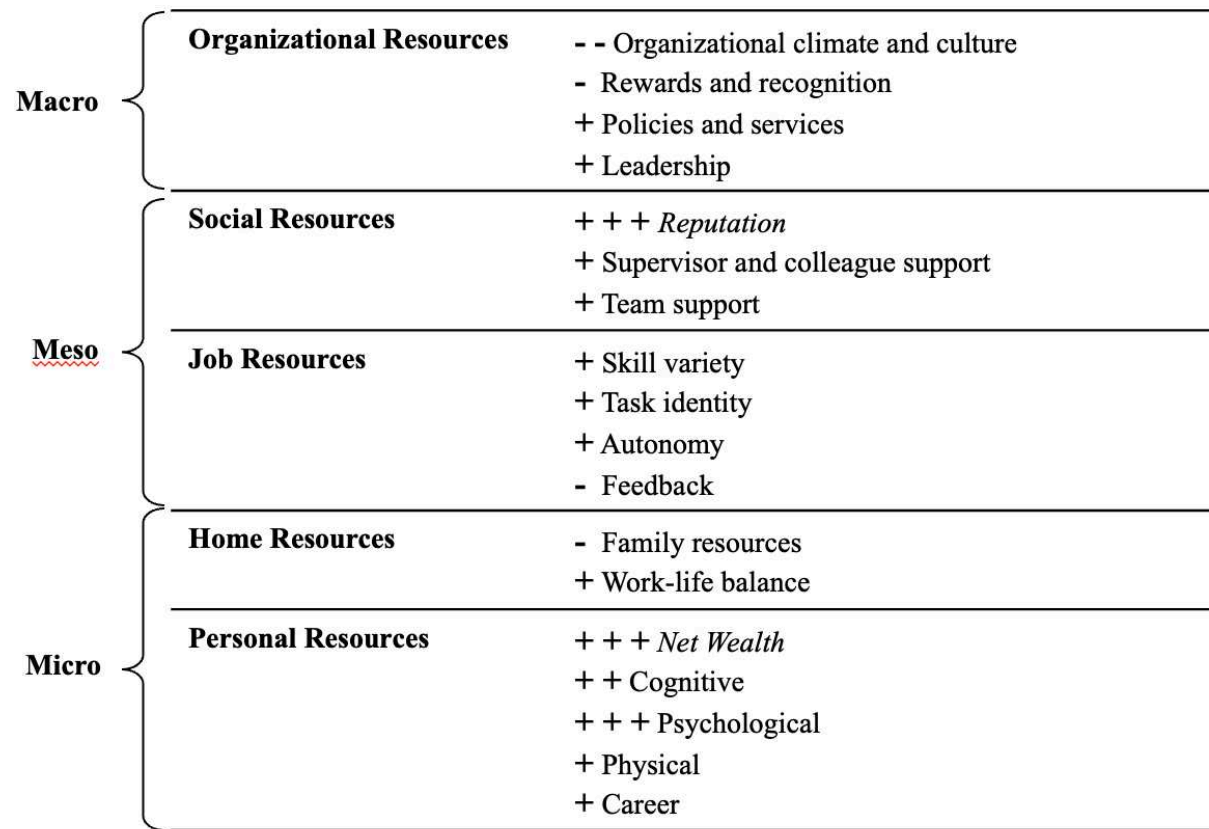
This research suggests that net wealth should be integrated into the micro-tier of the resource model. While many participants, including Michael, Rachel, and Bob, associated their work motivation with a commitment to home and family, net wealth is classified at the personal level because individuals generate these resources for consumption at the household and family levels. Even though multiple earners in a family may produce income, it is pooled and consumed at both levels. Individuals without families or other obligations generate and consume resources at their level. Therefore, an individual represents the lowest common tier.

Revised Resource Model

The investigated experiences revealed several gaps and relationships not previously outlined in the baseline resource framework. Figure 6 illustrates a revised framework. Several

Figure 6

Revised Resource Framework



Note: Adapted from Lee et al., 2019 and modified based on findings of this research

resources that were not identified during the interviews have been eliminated. Due to insufficient differentiating data, family resources were merged into one category. Reputation and net wealth resources were added, as noted above. Lastly, positive and negative indicators were placed before the label to signify the relative intensity of their role in the experience.

Participants emphasized a connection between net wealth and reputational resources that appeared to be continuously assessed throughout the event, regardless of duration. They considered the potential reputational and financial harm from their actions. Their primary motivation was to avoid losing both types of resources. However, this does not mean participants would abandon their boundary conditions for sufficient financial resources. Ethical

considerations were notably highlighted as firm boundaries they would choose not to cross. While the participants emphasized these limits under all conditions, the examples were self-selected and represented only a small sample of their cumulative experiences. Adherence to those limits under other stress conditions could not be validated.

Chapter Summary

This chapter addresses the primary and secondary questions by examining expressed experiences at individual and group levels. The Personal Experiential Themes (PETs) were developed and documented with supporting statements of meaning. Seven Group Experiential Themes (GETs) were formulated from the consolidated cross-analysis of sixty-nine individual PETs. These seven themes illustrated the similarities, differences, and progression of the group's lived experiences. A system diagram was presented to depict the sequencing and interactions among the seven GET meaning statements. Discussions of these findings, in the context of prior research and relevant theories, were included where appropriate. The seventh GET also addressed the secondary research questions focusing on the role of resources and which, if any, played a part in their experiences. Each level of resources defined by Lee et al. (2019) was analyzed considering the participants' experiences. Several resources appeared to be the most active, and two new resources were added to the resource framework. A modified framework was constructed to demonstrate the active role of resources in the experiences chosen by the participants.

CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS

This study aimed to better understand the lived experiences of late-stage career professionals as they navigated interpersonal risk in a group setting. The concepts of psychological safety, psychological availability, and resources served as the framework for analyzing these experiences. An interpretative phenomenological method revealed more profound insights into the phenomenon than previous quantitative research could provide. The primary and secondary research questions were addressed by analyzing interview data collected from ten volunteers.

The findings of this research enhance our understanding of how individuals prepare for, encounter, and respond to interpersonal risk. By acquiring more profound insights into these experiences, employee and leadership development programs may be enhanced to improve workplace performance, retention, and thriving. Additionally, organizational systems could be improved to enhance organizational outcomes. By boosting an organization's capacity to achieve better project goals, technological solutions that improve the lives of citizens and stimulate the economy may become available more quickly and at a lower cost.

This chapter first summarizes the findings related to the research questions. It then discusses trustworthiness and quality criteria to establish confidence in the conclusions. Based on the findings, it provides theoretical and practical recommendations. It also outlines suggestions for future research and additional limitations encountered during the study. Lastly, the author's reflections on the research process and concluding thoughts close the chapter.

Summary of Key Findings

This research aimed to answer the primary and secondary questions by analyzing the expressed experiences at the individual and group levels. The primary research question is: *How*

do individuals understand the lived experience and meaning ascribed to their decisions to put their resources at risk within a group setting? The secondary research question is: *If resources act as enablers or constraints in these decisions, and if so, which types of resources are most operative in these decisions?* To answer questions, ten participants were purposefully selected to provide data through semi-structured interviews. This interview data was analyzed using the Interpretative Phenomenological Analysis (IPA) research method developed by Smith et al. (2022). This method aims to uncover meaningful statements that reflect the participants' lived experiences as they navigate the phenomena.

After validation, the transcripts of the participant interviews were analyzed to develop Personal Experiential Themes (PETs) and accompanying statements of meaning. The PETs aimed to reveal and describe the lived experiences surrounding the participants' chosen decisions to engage in a risky encounter. Each PET was crafted to provide a rich and detailed description of the experience, supported by relevant direct quotations from the participant. In keeping with phenomenological principles, the author co-created the interpretation of these experiences. The PETs and supporting analyses were subsequently used to formulate group themes that addressed the primary and secondary research questions.

Seven Group Experiential Themes (GETs) were derived from the consolidated cross-analysis of sixty-nine individual PETs. These seven themes were designed to illustrate the similarities, differences, and progression of the group's lived experience. The seven themes include (1) identity, (2) reflections, (3) norms, (4) dilemma, (5) control, (6) boundaries, and (7) resources. A summary of the GETs and their accompanying statements of meaning is presented in Table 14.

Table 14*Consolidated Table of Group Experiential Themes (GETs)*

GET	Statement of Meaning
Identity	They experienced a strong sense of duty and personal standards, which informed their preferences for independence and introversion, reflecting their understanding of self.
Reflections	Influenced by formative past experiences and influential leaders, they described their decision-making as a careful balancing act between instinct, obligations and responsibilities to others with a desire to meet expectations.
Norms	They found clarity and focus in organizational norms that were grounded in structured roles and processes that balanced respect for authority with the need for shared understanding.
Dilemma	When confronted with unexpected conditions or broken norms, they experienced internal conflict driven by uncertainty when deciding whether to act to protect themselves or to uphold fairness and integrity.
Control	They sought out a sense of control in navigating ambiguity through the use of structured artifacts and data-driven models to foster collaboration, manage risks, and create shared understanding.
Boundaries	When faced with a breach of personal or professional standards, they encountered a tipping point and felt compelled to go beyond their usual boundaries, driven by a sense of duty to themselves and others.
Resources	They experienced tension between self-preservation and duty to others driven by a fear of lasting reputational damage and potential career risks, possibly eased by an awareness of their market value and a history of successful transitions.

These themes were integrated into the following summary answer to the primary research question:

As they approach a risky encounter, they experienced a heightened awareness of their sense of identity, how others influence that perception, and the structures and processes formed by their understanding of established norms. When faced with a dilemma, they attempt to exert control through structure and artifacts; however, if confronted with

personal boundary conditions, they must decide whether to risk their available resources by engaging in the encounter.

Figure 5 presented a system diagram that illustrates the sequencing and interactions of the seven GET meaning statements. This diagram highlights the iterative nature of many of these experiences.

The system model aligns with existing research in several ways. Individuals do not approach risky situations as blank slates. Pre-existing perceptions of self-image (e.g., bully or problem solver) and obligations to others (e.g., family and protection of life) are shaped by past experiences (e.g., former leader or parent). This finding is consistent with research on implicit voice theory (Deter & Edmondson, 2011). Pre-defined norms influence participants' expectations and operating parameters for the encounter. Expectations regarding role clarity, empowerment, leadership, corporate culture, and systems are established. However, challenges to these perceptions and norms create a dilemma. Throughout this process, individuals continuously negotiate between control, defined boundary conditions, and available resources to navigate the event. While some decisions were resolved almost instantaneously and others lingered for an extended period, all represented dynamic choices that evolved "at the moment."

The second research question explored the role of resources and identified which ones, if any, influenced their experience. Each level of resources defined by Lee et al. (2019) was examined in relation to the participants' experiences. Several resources emerged as particularly significant, including organizational climate and culture, policies, leadership, skills, autonomy, and personal resources; however, not all of these positively impacted the participants. In certain instances, the absence or distortion of a resource led to a decrease in the participants' willingness to engage. Personal resources were mentioned most frequently, especially psychological ones,

followed by cognitive ones. Clearly defined organizational policies and services, supervisor and colleague support, team assistance, and most job resources positively influenced their decisions. Conversely, organizational climate and culture were associated with the most negative perceptions, along with rewards and recognitions and family resources. Two new resources, reputation and net wealth, are proposed for incorporation into the resource framework. All participants highlighted the significance of these new resources in their experiences.

Participants saw reputation as a mediator between risk and outcomes. Reputation functioned as a social resource that could be developed, utilized, and potentially lost. As a social resource, its value relies on others' perceptions. They felt that damaging their reputation could adversely impact their job performance, career prospects, and overall financial security. The findings regarding reputation, especially for the chosen age group, supported a key premise of the Conservation of Resources (CoR) theory (Hobfoll, 1989). Participants seemed to place greater importance on maintaining their reputation, built over decades of performance and experience, compared to the potential gains of additional reputation. Moreover, the need to replace a lost job would impact their ability to retire as they expected. This threat to future retirement sometimes led to withdrawal or avoidance.

The analysis of reputations identified a second missing resource, net wealth, that operated dynamically alongside it. Participants used a broader definition of net wealth than previous research on resources (Foa & Foa, 1976), which focused on the immediacy of exchange. In these experiences, net wealth resources encompassed the value of future exchanges necessary for supporting life expectations after retirement. If their reputation was damaged to the extent that it jeopardized their job, participants considered that a material risk to their ability to meet future life demands. While the perception of this risk could be partially alleviated either through

confidence in job replacement or lowered expectations, it was a factor communicated by nearly all participants at some point in the progression of their experience.

The roles of reputation and net wealth seemed to interact dynamically throughout the engagement process, influenced by various organizational, social, job, and personal resources. A revised framework was created to illustrate the active resources in the experiences selected by the participants. It is important to emphasize that the updated resource framework reflects only the experiences of these participants and should not be generalized beyond this sample for broader implications.

Theoretical Contributions

The primary concepts informing this research include psychological safety, psychological availability, and resources. According to Edmondson, psychological safety is "the belief that the work environment is safe for interpersonal risk-taking" (Edmondson, 1999, p. 354). Psychological availability draws on Kahn's proposition and is described as "the sense of having the physical, emotional, or psychological resources to personally engage at a particular moment" (Kahn, 1990, p. 714). Resources are "anything perceived by the individual to help attain their goals" (Halbesleben et al., 2014, p. 5). It was proposed that individuals navigate their decision to engage or withdraw based on their willingness to risk available resources.

To frame this process, theories of social exchange were engaged, primarily the Conservation of Resources (CoR) theory (Hobfoll, 1989) and Social Resource Theory (Foa & Foa, 1974). Additionally, a baseline taxonomy of resources (Lee et al., 2019) was used to establish the initial construct and identify active or missing resources. These concepts and theories formed the crucible through which the interviews were conducted, and the resultant data

was analyzed. Although the subjective perspective offered by the IPA method is not intended to generalize, this research contributed to theory and research in several ways.

First, this study addresses a call from within the field to explore how psychological safety is dynamically formed while considering boundary conditions (Edmondson & Lei, 2014). It also fulfills an acknowledged gap in the literature, demonstrating how qualitative research can contribute to investigating the “at the moment” formation dynamics (Edmondson & Bransby, 2023). Although previous research has been mainly focused on the literature regarding psychological safety, the review of psychological availability conducted for this study revealed similar gaps. Through a qualitative research approach, the interviews offered unique insights into the factors and interactions experienced by participants during the events. The processes inherent to IPA enabled the development of a system model that could be used to understand better the formation and challenges of favorable psychological safety and psychological availability conditions fostered by individual, group, and organizational variables.

Second, the analysis satisfies calls to incorporate resources into the analysis (Edmondson & Lei, 2014; Newman et al., 2017). Further, this study highlighted the overlooked role of reputation and accumulated net wealth within the resource framework. While reputation and net wealth have been widely investigated in other fields, such as economics, their absence from the resource taxonomy explicitly derived from HRD research (Lee et al., 2019) left significant variables hidden. Additionally, the influence of accumulated assets in the late-stage career sample further underscored the importance of loss aversion inherent in the Conservation of Resources (CoR) theory (Hobfoll, 1989). When paired with insights into the most impactful resources active during the cited experiences, this study created a deeper understanding of the role of resources in decision-making events. These findings would contribute to future

comparative research with other samples to generate additional insight and contribute to future models aimed toward generalized theories.

Practical Contributions

This research addresses the practical challenge of how organizations can improve the outcomes of critical projects and programs to deliver additional value for their consumers and the economy. Organizations can better leverage the accumulated experience of their late-stage career employees to overcome obstacles. However, it is essential to emphasize that employees in this age group, while experienced, are not the sole repository of skills, innovation, and solutions. This study indicates several practical implications for how organizations can better utilize one of their existing resources.

By better understanding the influences on employees before engaging, managers and leaders may find themselves in a stronger position to foster constructive engagement from their employees. These findings reinforce previous research on implicit voice, which may explain why employee behaviors do not always align with immediate manager actions or behaviors. Managers may be better equipped to express empathy and support by understanding this influence more clearly. Managers should be trained on the impact of implicit voice on their employees and how their managerial actions can affect how employees interact with future leaders. HRD practitioners should create or select training that helps managers and employees recognize the influence of implicit voice.

Leaders should be aware of the significance employees attach to their reputations. While this is likely true for all employees, the late-stage career professionals interviewed for this research placed a high value on maintaining what they viewed as their earned reputation. In some cases, actions were taken to safeguard their reputation (loss aversion); in others, participants

withdrew (preservation) to avoid reputational harm. Leaders should reflect that their employees perceive their reputations as a precious asset that extends beyond current employment into home life and future life considerations. Leaders can minimize the perception of this risk by recognizing it.

Psychological safety is experienced and fostered in group settings (Edmondson, 1999). Interestingly, multiple participants noted an expectation arising from organizational, leadership, or personal preferences for resolving conflict privately. Yet, how will groups test and develop conflict resolution skills if such issues remain hidden? Managers should thoughtfully expose conflict within the group so everyone can observe successes and failures. By challenging these norms and emphasizing the complexities of conflict, the team could enhance its learning culture and improve its ability to navigate conflict more quickly and constructively.

While leaders and organizations cannot assume responsibility for the financial stability of their employees, they can design incentive programs that provide options for the long-term attainment of goals. Replacing retirement programs aimed at long-term results and retention with programs that offer more flexible but immediate results may impact future generations in ways we do not fully understand. HR practitioners and compensation planners should consider how these policies may affect their ability to harness the experience of late-career professionals. This study identified the perception of employment risk as a barrier to engagement and contributions, particularly in the later stages of a career.

Assessment of Reflexivity

Within the framework and methodologies of the IPA research method, the researcher collaborates with the subject to co-create the findings (Smith et al., 2022). Furthermore, the hermeneutical nature of IPA positions the author as the primary interpreter of meaning. While

IPA is designed to elicit rich and deep narratives based on ideographic analysis of experiences, it carries the risk of researcher bias. In Chapter 3, the “bridling” process was described to achieve a level of epoché-reduction sufficient to yield valuable insights within the IPA framework (Dahlberg et al., 2008). Bridling is predicated on three features: (1) the restraint of pre-understandings; (2) a focus on the whole event instead of just preconceptions; and (3) a forward-looking approach that highlights caution and contemplation, contrasting with the retrospective nature of bracketing. This approach was employed to minimize the influence that my positionality as a researcher and interpreter may have had on the participants during the interviews and analysis.

Restraint of pre-understanding was achieved through several methods. First, I acknowledged my personal experiences and positionality in Chapter 1 of the research. Throughout the study, I maintained my professional role while continuing to develop my expertise, which influenced this research. Reflexive journaling occurred before, during, and after each interview and during the analysis phases (Lincoln & Guba, 2013). I documented my preconceptions in the journal to explicitly acknowledge them and their potential impact. During the interviews, I noted any pre-emptive analysis in the journal to keep my attention on the interviewee and their story. This journal remains accessible as needed for auditing and replication.

The focus on the entire event was achieved in two ways. First, interviews were scheduled with no more than one week between the second and third interviews. This minimized recall erosion and kept the participants aware of the purpose and structure of the research. They had opportunities to prepare examples and revise previous statements, if necessary, although none did. Additionally, it prevented the overlap of primary interviews, allowing for validation and

preliminary analysis to be completed before conducting the next interview. Second, the individual data collection and analysis was completed for each participant before moving on to the next. This helped maintain a focus on the overall participant experiences and isolate influences between participants.

In addition to the annotations in the reflexive journal, a forward focus was primarily achieved through the procedures outlined in Smith's IPA process analysis. The sequential and disciplined process of exploratory noting, experiential themes, and personal experiential themes was completed for each participant. This structure slowed down the interpretative phase, allowing themes of meaning to emerge from the data. The GET process was performed only after all PETs were completed. The system framework was continually refined as the analysis and writing advanced, reflecting a deeper understanding of the meaning statements and their interactions.

Bridling is a dynamic process that emphasizes balancing influence and bias with the advantages an informed researcher can contribute to an investigation. My familiarity with the industry and technology allowed me to engage in constructive dialogue with the interviewee, ensuring that the focus remained on the phenomena rather than deciphering jargon. Additionally, all email communications and documentation utilized the author's university credentials to reduce the impact of power dynamics with the participants. However, the author's professional toolset ensured quality recordings and transcription. Two participants were previously known to the researcher, but all were employed outside the researcher's organization to reduce actual power differentials. Informal power differentials arising from the researcher-interviewee dynamic were addressed by considering participant comfort and emotions and employing

interview techniques, such as semi-structured interviews with probes tailored to the unique aspects of the participant's experiences.

Quality Indicators on Findings

Quality criteria for data collection and analysis were detailed earlier in Chapter 3. Examples such as reflexive journaling, audio and video recording, accurate and precise transcription, and member checking were discussed previously. With the completion of the analysis, a quality assessment of the resulting findings is warranted. Four quality indicators were outlined in Chapter 3. They are: (1) the construction of a compelling, unfolding narrative, (2) the development of a vigorous experiential and/or existential account, (3) conducting a close analytic reading of participants' words, and (4) attending to the convergence and divergence of experiences to reveal a deeper meaning.

First, the PET analysis constructed narratives from the individual experiences. The PETs provided in Chapter 4 were designed to tell the story from the participants' perspectives, incorporating their words and phrases as appropriate. This process was repeated at the GET stage but with a re-alignment of the experiences into common themes supported by relevant direct utterances. Next, the meanings of the participants' accounts were extracted through PET and GET development processes that focused on the experiential and, at times, existential aspects of the selected experiences. Statements of meaning, not envisioned in Smith's original construct, were crafted to add depth and context to the meaning states. Third, examining the participants' words, including their choices, repetition, and context, was conducted through a thorough review of the validated transcripts. Lastly, while PETs and GETs were constructed primarily through common themes, their analysis included exploring divergent experiences and findings to uncover

potential explanations for the variances. These variances enriched the analysis and the resulting frameworks.

Meticulous care and discipline were exercised to achieve reliable results. Adhering to these four criteria for assessing the quality of IPA research enhanced the framework and credibility of this study.

Limitations of the Study

The limitations and delimitations inherent in the chosen research design were discussed in Chapter 3. These included inaccuracies or bias resulting from insufficient or inaccurate articulation of past events, sample size, participant selection, and data collection that relied solely on remote methods. Most importantly, phenomenological research, although intended to offer new and rich insights, is constrained to localized findings. While it aims to inform future research, the results cannot be generalized beyond the specific context and participants examined. Several practical limitations arose during the conduct of this study.

First, many participants arrived without specific examples despite the preparatory work conducted during the initial interview and a pre-interview email outlining expectations. While this might align more closely with the pre-reflective state objectives of phenomenological research, the need to select examples spontaneously during the interview may have limited the depth and accuracy of their recall. Several participants found it challenging to identify relevant experiences from the designated period. The time spent searching for a suitable experience during the interview detracted from the available time to gather data and explore the experience.

Second, while the sample was intentionally small and homogeneous, some limitations related to the participant demographics occurred. Three participants were female, slightly better than the IT industry average of 27% (CompTIA, 2024). Four of the ten participants were of

South Asian descent, while six primarily identified as having European heritage. Although the mix of European heritage matched recent demographics specific to IT, the South Asian sample was twice the industry average of 22% (CompTIA, 2024). While some participants were of South Asian descent, all had decades of experience within Western corporate culture and norms. This collected sample excluded contributions from African-American and Latin-American populations, which could have produced different outcomes.

Recommendations for Future Research

Most existing research has focused on the group unit level, often using individuals as a dependent variable (Edmondson & Bransby, 2023). These studies sought to understand how psychological safety influenced outcomes or was affected by external factors, such as leadership style or organizational culture. Although no comprehensive literature review has been conducted on psychological availability, a review of the studies in this research indicates a similar pattern. This research suggests that more attention should be given to the internal factors individuals experience while navigating these decisions. How can individuals prepare to embrace the interventions leaders and organizations initiate to enhance these conditions? What personal development strategies would yield the most impactful results combined with those interventions? Additional qualitative analysis of this dynamic model may provide the data necessary to develop or refine instruments.

This research focused on a specific group of late-stage career professionals to better understand their experiences based on their varied positions. Future studies should explore contrasting experiences across different demographic groups, including working generations, cultures, and industries. Differences in resources obtained or variations in cultural norms could reveal different intensity levels or other variables absent in the proposed system framework.

The authors of the baseline taxonomy of resources acknowledged that they limited their construct to research in psychology, management, and human resource development. They excluded fields such as economics and sociology (Lee et al., 2019). This may partly explain the framework's exclusion of reputation and net wealth. Much of the research on psychological safety and availability has also focused on the immediacy of these resources, such as annual salary, without considering the accumulated value of these assets. Future research should aim to expand the resource framework into additional fields and build upon the updated framework to identify further functional resources at the individual level. Additionally, future research should investigate the factors determining the relative intensity levels of resources to better guide leaders and organizations in prioritizing their HRD investments and programs.

Final Reflections

As this dissertation concludes, reflecting on the personal experience and research process is appropriate. I deliberately chose the IPA research method to explore the lived experiences of late-stage career IT professionals in my peer group. The results revealed the depth and complexity of the experiences selected by the participants, enhancing the existing body of knowledge. The findings also highlighted the intricacies of engaging with qualitative inquiry, contributing to the author's personal and scholarly growth.

The IPA method and processes required deep engagement with the stories gathered from the interviews, along with an openness to listen to and interpret these unique experiences. This engagement was both a privilege and a responsibility. Care was taken to listen actively and interpret the shared experiences faithfully. While this qualitative research aimed to fill gaps in our understanding, it also cultivated an appreciation within the author for the discerning power of qualitative research for both the participant and researcher.

While insightful and exciting, this research presented several challenges. Although IPA typically uses sample sizes of two to six participants, a sample of ten was recommended for dissertation work. When coupled with the author's inexperience with this technique, the sample sized a significant number of exploratory notes and experiential statements were generated. Despite applying discipline and structure rigorously, this increased volume may have led to missed themes or alternative interpretations. Additionally, the sample and techniques required a significant investment of personal energy to understand each participant's experience as authentic and valuable. This pushed the author into moments of discomfort as personal assumptions and beliefs were challenged. Ultimately, these experiences cultivated a deeper awareness and sensitivity to the complexities of qualitative research on human experience within the author.

The value of this research lies in the emergence of new and unexpected insights. It is hoped that the group's experiential theme descriptions, systems framework, and revised resource model will contribute to the collective body of knowledge. The interviewee and the results also provided personal insights into irrational fears of being fired, imposter syndrome stemming from weak technical skills, and an appreciation for shared emotions and experiences with the participants. These insights can potentially enhance the author's and other leaders' scholarly, professional, and personal development.

In closing, this dissertation marks the conclusion of the research project and the start of the author's ongoing learning and growth. I am thankful to the participants, my advisors, my committee, and my family for their support during this journey. This experience has deepened my understanding of the phenomena, enhanced my research skills, and highlighted the

significant work that remains. As I move forward, I hope to apply these insights and reflections to future research and practice.

Conclusion

This research aimed to explore the lived experiences of information technology professionals in the later stages of their careers when making decisions about participation in or withdrawal from interpersonal risk. Additionally, it evaluated the importance of various resources in this context and identified which were most effective. By employing the Interpretative Phenomenological Analysis (IPA) research method, the depth and richness of experiences selected by a carefully sampled but homogeneous group of professionals were examined. The operative double hermeneutic of IPA confirmed existing theories while offering new insights into HRD theory and practice.

The results of this investigation highlight the inherent complexity of interpersonal risk decisions. By grounding the analysis in the participants' voices and narratives, the complexity of these experiences was revealed, leading to fresh insights. The group's experiential themes and descriptions, the system framework for the lived experiences, and the modified resource framework aimed to illuminate what was experienced and how it was experienced. These new perspectives and understandings may aid HRD professionals in developing and implementing new or improved theories, techniques, or interventions designed to enhance complex projects and organizational outcomes.

While this study provided some new insights, it is not without limitations. These include the localization of findings inherent to phenomenological work, driven by the small sample size and hermeneutical approach. Additionally, underrepresented groups were not sufficiently examined, and the remote interviewing process limited access to potentially valuable nonverbal

and contextual information. However, through a disciplined approach to defined quality criteria, these limitations do not significantly detract from the study's significance. Instead, they may offer insights for future research opportunities.

This research prompts further exploration of these phenomena. While a literature review showed that the number of qualitative studies has risen in the past five years, further investigation could enhance our understanding of individuals' "at-the-moment" experiences. Diversity across populations, industries, and cultures may yield innovative insights. This research also highlighted the need for HRD professionals and leaders to integrate these insights into interventions that could improve complex project execution, reduce overhead, enhance quality, and drive more innovation.

In conclusion, this dissertation represents a step forward in understanding complex human interactions amidst interpersonal risk. It results from a sustained effort to engage deeply with participants' lived experiences, aiming to develop fresh insights and lay a foundation for future research. The insights from this study highlight the importance of attentive listening, comprehensive understanding, intellectual curiosity, patience, and interpreting personal experiences in their full richness. The author hopes that researchers, practitioners, and individuals will find the results as equally challenging as the author experienced during their development.

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Appendix A: Participant Recruitment and Consent Email

To: (Prospective Participant)

Subject: Invitation to Participate in a Research Study

Dear (Prospective Participant),

I am Boyd Novak, a doctoral candidate at Colorado State University School of Education (Organizational Learning, Performance and Change). I am conducting my dissertation research on how individuals decide to engage or withhold from potentially risky interpersonal activities within a group setting in the professional work environment.

You may be familiar with psychological safety, such as the belief that the work environment is safe for interpersonal risk-taking. My objective is to expand our understanding of these conditions by examining the role of individual resources in the complex social exchange within groups. I hope these findings can be used to improve policies, practices, and structures to improve organizational and personal outcomes.

I am soliciting your participation based on your personal and professional experience in the Information Technology industry. Your participation would involve two recorded interviews, one for one hour and one for thirty minutes, via Zoom or Microsoft Teams, on a date and time of your choosing within the timeframe of May through August 2024.

I have attached an Executive Summary and Informed Consent Agreement for your preview and preparation. If you agree to participate, please sign the required Informed Consent Agreement and return it to me via email at Boyd.Novak@colostate. I will contact you after I receive this consent form to coordinate a suitable interview date and time.

Please do not hesitate to contact me with any questions or concerns regarding this study. I appreciate your consideration.

Sincerely,

A. Boyd Novak
Doctoral Candidate
Co-Principal Investigator
Colorado State University

Thomas Chermack, Ph.D.
Professor
Co-Principal Investigator
Colorado State University

Appendix B: Preliminary Interview

This interview will occur before the semi-structured interviews (Englander, 2012). The purpose of this interview is three-fold. First, as a conversational experience, it is designed to build a report with the interviewee and ensure clarity on the objective and process. Secondly, it will document the life-world of the participant to establish the context of the experience to be examined. Lastly, demographic data will be gathered to validate that the participant meets the selection criteria for this study.

1. First, thank you for taking the time to speak with me today. As explained in my email introduction, I am conducting research for my dissertation at Colorado State University. The study is designed to understand better how and why people engage in or withdraw from difficult interpersonal conversations. I hope that together, we can discover more about how these conversations take place, why people decide to engage or avoid them, and what kind of experiences people encounter during these events.
2. Next, I need to gather minimal information to validate that you meet the selected criteria for participating in this study. Can I ask a few questions about you and your role?
3. Participant demographic data

Name				Preferred Name:
Age Range	<input type="checkbox"/> 50-59	<input type="checkbox"/> Other (reject)		
Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female	<input type="checkbox"/> Decline to ID	
Organization				
Title/Role				
Time in the Organization	<input type="checkbox"/> < 3 years	<input type="checkbox"/> 5-10 years	<input type="checkbox"/> 10-20 years	<input type="checkbox"/> >20 years
Time in IT	<input type="checkbox"/> ≥ 5 years		<input type="checkbox"/> < 5 years (reject)	
Responsibilities	<input type="checkbox"/> Executive	<input type="checkbox"/> Management	<input type="checkbox"/> Individual Contributor	
Education Level	<input type="checkbox"/> GED/HS Diploma		<input type="checkbox"/> BA or BS	
	<input type="checkbox"/> Some College		<input type="checkbox"/> MA or MS	
	<input type="checkbox"/> Associate		<input type="checkbox"/> Doctorate (PhD or DBA)	

4. Thank you for this information.
 - 4.1.1. You meet the design criteria. Can we schedule the next interview?
 - 4.1.1.1. When we meet next, I will ask you about specific experiences where you deliberately decided to engage in interpersonal risk, such as offering your opinion on a complex and potentially controversial activity.

- 4.1.1.2. Next, I will ask you about a time you deliberately decided not to engage in such an activity.
 - 4.1.1.3. Before our next meeting, please select an example of each case.
 - 4.1.1.4. It is essential for you to select cases in which you believe you most authentically experienced this decision. It does not need to be the most dramatic or emotionally charged experience, although it may be.
 - 4.1.1.5. Please choose examples that occurred within a group setting rather than with an individual. While the example group may include your superior, the primary area of focus is within a group setting.
 - 4.1.1.6. Most important is your ability to recall, describe, and position yourself back into that experience.
- 4.1.2. Thank you, but you do not meet the design criteria. I appreciate your time today.
5. Do you have any suggestions on other candidates I might contact?

Appendix C: Informed Consent

Consent to Participate in Research Colorado State University

I am Boyd Novak, a Ph.D. candidate in the School of Education at Colorado State University. You are invited to participate in my research study. The following information is provided to ensure you thoroughly understand your participation's purpose and nature. Please contact me at (303) xxx-xxxx or Boyd.Novak@colostate.edu with any questions.

Title of the Study: Understanding the interpersonal risk decisions of late-career professionals: An interpretative phenomenological analysis

Procedures:

If you agree to participate in my research, I will conduct remote interviews with you at a convenient time. The interview will involve questions about how you decide to engage or withhold from potentially risky interpersonal activities within a group in your professional work environment. Questions will examine how types and levels of resources contribute to that decision to engage. The questions will also investigate the role of different kinds of resources (e.g., organizational culture, rewards, professional status, personal energy, or home or social resources). The interview will be video and audio recorded to document the information you provide accurately and will be transcribed for further analysis. If, during the interview, you feel uncomfortable or change your mind for any reason, I can terminate the recording and interview.

I expect to conduct two interviews of approximately 60 minutes and 30 minutes each. However, follow-ups may be needed for added clarification. I would contact you via email or phone using your contact information. This contact information will only be used for this research and will not be shared with any other individual or organization for any purpose.

Benefits

There is no direct benefit to you from participating in this study. Hopefully, this research will contribute to the larger body of research informing how organizations can improve conditions under which individuals feel comfortable participating in group activities, thereby improving outcomes for both the organization and individuals.

Risks/Discomforts

The research questions will ask you to recall prior events and experiences making potentially risky interpersonal engagement decisions. While every effort will be made to ensure a safe and secure environment during the interview, this process of recollection may make you uncomfortable. If so, you can decline to answer the question or stop or pause the interview.

Confidentiality

As with any research, there is a chance that confidentiality could be compromised; however, the following precautions will be taken to minimize this risk.

The researcher recognizes that interviewees may provide information that could be perceived as disparaging toward their organization or an individual within that organization, thus posing a potential risk to their personal and professional reputation.

All data will be stored on an encrypted and password-protected cloud storage instance for the duration of the research. Your identity and association with responses will be private and only be seen by the researchers. The only exceptions are if we are asked to share the research files for audit purposes with the CSU Institutional Review Board (IRB) ethics committee, if necessary. For any analysis and publication of results, all personal names will be de-identified and replaced with anonymized labels for each participant. The anonymization codes will only be available to the researchers.

The researcher may employ third-party transcription services to ensure the accuracy of the transcription.

After de-identification (i.e., removal of all personally identifiable data), information may be used for future research studies or distributed to another investigator for future research studies without additional informed consent from the subject or the legally authorized representative. Records will be retained these records for up to 5 years after the study is over. The same measures described above will be taken to protect the confidentiality of this study data.

Compensation

In recognition of your contribution to this research and time commitment and upon timely direction, an honorarium of \$100 will be made to the non-profit of your choice.

Rights

Participation in research is entirely voluntary. You are free to decline to take part in the project, decline to answer any questions and stop participating in the project anytime. Whether or not you choose to participate in the research, answer any questions, or continue participating in the project, there will be no penalty to you or loss of benefits to which you are otherwise entitled.

Questions

If you have any questions about this research, please contact me at (303) 521-1035 or boyd.novak@colostate.edu.

If you have any questions about your rights or treatment as a research participant in this study, please contact the Colorado State University Institutional Review Board (IRB) at 970-491-1553 or by e-mail.

Principle Investigator: Thomas Chermack, PhD Advisor, School of Education (Organizational Learning, Performance, and Change), Colorado State University; Email: Thomas.chermack@colostate.edu

Co-Principle Investigator: A. Boyd Novak, Ph.D. candidate, School of Education (Organizational Learning, Performance, and Change), Colorado State University; Email: boyd.novak@colostate.edu

CONSENT

By signing below, you agree that I have read and understood the information provided. I voluntarily wish to participate in this research and understand that I can withdraw at any time without reason or cost. My digital signature also acknowledges that I have received a copy of this informed consent document on the date signed.

Do you consent to your interview being recorded?

Yes

No

Do you consent to the researchers contacting you for follow-up questions related to this study or to participate in new research?

Yes

No

(digital signature)

Signature of Study Participant

Date

Printed Name of Study Participant: _____

Name of Person providing information: Boyd Novak

Signature of Research Staff

Date

Appendix D: Semi-Structured Interview Guide

1. Second Interview (60-minutes)

1.1. Thank you again for agreeing to participate in this research. Before we begin, I have a few initial questions.

1.1.1. This interview is scheduled for approximately 60 minutes. Are you ok with that duration? Are you comfortable in your setting, and is the connection over Zoom/TEAMS effective?

1.1.2. Verify informed consent and approval to record.

1.1.2.1. As a reminder, everything we discuss is confidential and will be protected as outlined in the consent form. All transcribed data will be anonymized, encrypted, and protected to reduce the risk of anyone associating your comments with you, colleagues, or organizations.

1.1.2.2. I previously received a signed informed consent agreement from you, which allows the recording of this interview and proposes the use of the data for the sole purposes of this research. Do you still agree with that consent, and can I proceed to record this interview?

1.1.2.3. Recording Begins or Interview Terminated

1.2. Summary review of the purpose and scope of this study

1.2.1. This study aims to understand better the conditions and considerations individuals experience when determining whether to engage in potentially risky interpersonal interactions within a group. Specifically, the role of resources will be examined. Questions will probe the role of different types of resources (e.g., organizational culture, rewards, professional status, personal energy, or home or social resources).

1.2.2. I hope this research will provide meaningful insights to individuals, leaders, and organizations to improve the conditions under which individuals may effectively contribute to group objectives and organizational outcomes.

1.2.3. You will be asked to recall and describe specific examples. It is essential that you choose examples that occurred within a group setting rather than with an individual. While the example group may include your superior, the primary area of focus is within a group setting.

1.2.4. Do you have any questions before we begin?

1.3. Interview Questions

1.3.1. Recall a time when you deliberately decided to participate in a potentially risky group interaction. Can you describe that in as much detail as possible?

1.3.1.1. Prompts as required.

1.3.1.1.1. Tell me more about the settings, participants, or issue being discussed.

1.3.1.1.2. What stood out to you as you were considering the decision to participate?

1.3.1.1.3. What did you think you might be risking?

1.3.1.1.4. Ultimately, why did you decide to engage?

1.3.1.1.5. What might have kept you from engaging?

1.3.1.1.6. Has your understanding or perception of this experience changed since it first happened?

1.3.2. Recall a time when you deliberately avoided a potentially risky group interaction. Can you describe that in as much detail as possible?

1.3.2.1. Prompts as required.

1.3.2.1.1. Tell me more about the settings, participants, or issue being discussed.

1.3.2.1.2. What stood out to you as you were considering the decision to participate?

1.3.2.1.3. What did you think you might be risking?

1.3.2.1.4. Ultimately, why did you decide not to engage?

1.3.2.1.5. What do you think would have happened had you engaged?

1.3.2.1.6. What would have to have been different for you to engage?

1.3.2.1.7. Has your understanding or perception of this experience changed since it first happened?

2. Third Interview (30 minutes)

2.1. Thank you again for agreeing to participate in this research. Before we begin, I have a few initial questions.

2.1.1. This interview is scheduled for approximately 30 minutes. Are you ok with that duration? Are you comfortable in your setting, and is the connection over Zoom/TEAMS effective?

2.1.2. Verification of informed consent and approval to record.

- 2.1.2.1. Do you still agree with prior informed consent, and can I proceed to record this interview?
- 2.1.2.2. Recording Begins or Interview Terminated
- 2.2. Corrections in error or fact
 - 2.2.1. Since we last connected, I have provided you with a transcript of that interview. Do you have any concerns, corrections, or clarifications you would like to make?
- 2.3. Meaning through reflection and imaginative variations
 - 2.3.1. After our last discussion, have you had any additional thoughts or reflections on the experiences we discussed?
 - 2.3.2. Focusing on the experience where you did not engage, how do you think your experience would have been different if:
 - 2.3.2.1. You had more power within the group?
 - 2.3.2.2. You had been more financially secure?
 - 2.3.2.3. You had more support from your family or friends?
 - 2.3.2.4. You had possessed other skills? What type?
 - 2.3.2.5. Your organization had a different climate or culture? What kind of change?
 - 2.3.2.6. You were earlier in your career?

Appendix E: Pro forma Constructing an Experiential Statement

Interview # (Data)	Experiential Themes	Transcript Date	Exploratory Noting
	<p><i>Int:</i> 0:04</p> <p><i>Participant:</i> 0:16</p>		