

**The Influence of Intercultural Factors
in Corporate Education:
A Case Study from the Transport and
Logistics Industry**

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**A thesis submitted to the University of Technology, Sydney, in
fulfilment of the requirements for the degree of
Doctor of Education**

**Faculty of Arts and Social Sciences (FASS)
2014**

CERTIFICATE OF ORIGINAL AUTHORSHIP

I certify that the work in this thesis has not previously been submitted for a degree nor has it been submitted as part of requirements for a degree except as fully acknowledged within the text.

I also certify that the thesis has been written by me. Any help that I have received in my research work and the preparation of the thesis itself has been acknowledged. In addition, I certify that all information sources and literature used are indicated in the thesis.

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ABSTRACT

As an adult education practitioner over the last twenty years the researcher has worked in different corporate sectors such as Energy, Finance and more recently Transport and Logistics, from which this study is taken. The context he has worked in has always been the training departments of these corporations at a National, Regional (Asia and Europe) and Global level.

The constant theme prevailing throughout these corporations is their approach to training, which is a *One Size Fits All* that is, the corporate message needs to remain the same across the globe. However, how the corporate message is transmitted can be approached differently to expedite meaning, improve comprehensive cognition and rapidly impact the bottom line through quicker skill and competency uptake. Another theme is the researcher's hunch that corporations can develop better practices by working with the cultural wisdom that exists with their multicultural workforce.

This research is a comparative study of corporate education across two cultures to identify intercultural factors that may enhance or hinder learning. It is hoped this study clarifies those concepts, assisting practitioners to develop more effective organisational development programmes for cross cultural learning situations whilst offering a template guide for practitioners to research and study their practice.

Drawing on Myles Horton (1991) ideas, a study was designed on a corporate global curriculum and how it was developed and used in a range of settings across Europe. Through Content Analysis of course materials, the study used data from a course module to perform a number of comprehensive reviews. Observations and interviews were performed using an Insider/Outsider approach with the facilitators. Mapping these responses provided data to revisit the Content Analysis stage to identify new codes, categories, relationships, networks and maps. These were checked with the same stakeholders to confirm accuracy of the findings which would be used to review the existing *One Size Fits All* approach and justify a move from dichotomous to dialectical practices in corporate education.

Overall this study suggests training can be enhanced by using learner identity, by blending cultures of the learner and the corporate and by creating an authentic Third Space, between the individual and corporation, where learning for all can be situated. This study also suggests detractors exist (such as unilateral approaches) which limit employee learning and corporate effectiveness. Finally, this study provides a first step on the path for practitioners to attempt (what has historically been the scholarly task of researching practice) praxis, as Freire (1968) sees it, to improve their practice and transform the wider field of practice.

ACKNOWLEDGEMENTS

There are many people that need to be thanked for assisting me with the completion of this thesis. Firstly I would like to acknowledge the involvement of my supervisor on this project, Dr Roger Morris. Roger has contributed to the development of this thesis throughout its life in many different ways. Roger was one of my first lecturers whilst I was studying at UTS from 1992 to present day and opened my eyes to the possibilities of learning from the practice of others. My interest in international and comparative education has grown steadily since that time. It was also Roger whose firm belief that there was a great need for more practitioners from the field of corporate education to contribute to academic research that made me persevere and continue with my study. For this and more, many thanks Roger.

I would also like to thank Dr Tony Holland and Dr Bob Pithers for their support as my associate advisors. Their guidance and advice throughout my research studies has also been crucial to completing this thesis. Similarly Margaret McGrath and Juleigh Slater from UTS have both been of immense help throughout my studies.

It would be remiss of me not to also thank the UTS Ethics Committee and the guidance and assistance that they have provided. Particular mention needs to be made of Professor Jane Stein-Parbury (Chairperson UTS Human Research Ethics Committee), and Ms Rachael Laugery the Research Ethics Officer who both supported me through my many questions by providing answers that clarified and guided the development of my research proposal in an ethical sense.

I would like to thank all those who participated in this study. I am unable to name all of those involved, though you each know who you are and I sincerely thank you all. One special mention to my Spanish brother Jose for whom I am forever grateful for knowing, as his wisdom, guidance and patience with the boy from Oz (me) is something that no words could ever convey enough thanks and gratitude. As Jose often told me "*sit, wait and stay calm*", this is how I finally wrote my thesis.

Education is a critical part of my life so I would like to thank all my mentors. John C. my first Training Manager who taught me the basics of training and corporate

politics. Trevor D. for all the career talks. Neil W. who taught me all about managing a training team and to look beyond training and believe in myself as a manager. Then as a training manager I was taught more by great colleagues such as Ray J. (brilliant instructional designer), PVK & Sando (great communicators), Wayne H. (human side of training), Andy G. (how to manage upwards) and Gail B. (how to manage everything). Similarly I would like to thank UTS and also the Australian Government for providing me with the opportunity to apply for and study at the Professional Doctoral level at little personal financial cost. This is one of the marvels of the Australian education system of which I am forever grateful.

A special acknowledgment to my family needs to be made. The first of these goes out to my parents for crossing oceans to take the risk in a new land and bring me up in Australia. Rearing me from child to man against a backdrop of mixed identities and cultures was not easy, but Mum and Dad you did a great job. Also my brothers Gaby and Jim my sincere thanks for being the other influential guides to me in various ways. To my inner circle of boy and now manhood friends, who throughout my life have gone beyond just being friends but have become my brothers. It is all of you, who have taught me so much about life and also to whom this thesis' origin and goals relate. You come from all corners of the globe, and provided a context to my life that has permitted me to develop amongst many cultures and identities.

Finally thanks to my wife Katrina and sons Daniel and Marcus. Kat you have been a great source of strength and guidance throughout my many years of study and work. You have been the mentor, audience, advisor, teacher, participant and much more to all my training practices and educational endeavours over the years. This study has its principal dedication to you. Daniel and Marcus I hope that this thesis, together with its conclusions and recommendations, helps to create a better world for you as future students, participants, practitioners and people.

TABLES OF CONTENT

CERTIFICATE OF ORIGINAL AUTHORSHIP	II
ABSTRACT	III
ACKNOWLEDGEMENTS	V
GLOSSARY	1
PREFACE	5
1 – THE PROBLEM	9
2 – BACKGROUND TO THE STUDY	22
3 – METHODOLOGY	59
4 – FINDINGS	92
5 – CONCLUSIONS, IMPLICATIONS, RECOMMENDATIONS	136
6 – REFLECTIONS	170
BIBLIOGRAPHY	190
APPENDICES	201

GLOSSARY

The following glossary within this section aims to provide general basic definitions (from the researcher's perspective) of the terms used within the study. It is by no means comprehensive as it is only intended to provide an entry level definition. Further explanation of some terms is provided within the text.

Colonialism

This is the practice of one group overpowering another to exert their own influence, policies, traits and more thereby dominating and weakening the “victim”. Within this study it sometimes (but not solely) refers to how corporate head offices dictate doctrine, policies and training for country branches to follow, with little to no consultation, discussion or input with country branches.

Content Analysis

A research approach focussed on the analysis of content to identify the intentions and communication tendencies of a programme. An example often used in this research is the course module being analysed as part of this study.

Corporation/Organisation

Within this study this is the business entity that runs functions covering transport and logistics as a means to make profit on a day to day and year to year basis. An example of this is ABC Pty Ltd. Within the corporation there are a number of hierarchical layers which exist and also roles which trainers operate within. These are also defined below.

Country Trainers

The trainers that provided training for their country employees at an operational level within an organisation were often called Country Trainers.

Culture

The characteristics of a particular group of people, nations, regions, as well as occupations, business firms and others which includes their religion, language, habits, beliefs, attitudes and many more related practices. Within this study it often

refers to the Spanish speaking and English speaking groups which are being studied, as well as the various occupational groups such as managers, executives, trainers, trainees and more. The term is also used in other similar contexts within the study as well.

Dialectical

The common practice of logical discussion and/or debate to investigate and determine reason. Within this study it is commonly referred to as the practice of open and transparent dialogue of more than one entity across a group to allow for greater input and ideas leading to improved outputs.

Domestic

This defines the market where goods and services operate at a country level. An example of this is when ABC Pty Ltd moves goods between Leuven and Gent (two local cities within Belgium).

Global Head Office

This is the central worldwide headquarters of the corporation where the CEO and Executive Board Members sit that control the overall corporation. An example of this is ABC Pty Ltd Global Office in London.

Global Head Office Training

The process in which the corporate head office training entity outsourced their requirements to external training companies who then ran the programmes to regional head office trainers.

Globalization

A worldwide move towards integration on economic, financial, trade, communication, health and more. Within this study the term has many meanings including the move to commonality and reduction in identity and culture.

Identity

The distinctive characteristics that belong to an individual or group that contributes towards their self definition. Within this study it is often in reference to the learner and their uniqueness and culture.

Insider/Outsider

A research approach focussed on the analysis of a given situation incorporating both an internal and external view. An example often used in this research is analysing how the course module being studied within this research is perceived by the facilitator and participant involved in the process of learning, but then also including an external observer's perspective of that process as well.

Intercultural

The process of mixing or exchanging cultural traits. Often within this study it refers to the way in which various cultures may blend and merge together within a learning setting.

International

This defines the market where goods and services operate at a global level. An example of this is ABC Pty Ltd moves goods between Leuven and London (one city in Belgium and the other in England).

Local

This is a local branch or facility level where the day to day functioning of the business is completed. An example is ABC Pty Ltd Leuven (a city in Belgium).

Local Country Trainers

The trainers that provided training for their country at a local operational branch or facility level within an organisation were usually called the Country Trainers. If however there was another level (which in some large countries did exist) then this is where this person fitted and they were called Local Country Trainers or Facilitators.

Mixed Method

The research technique of using more than one method or approach to investigate a research question. Within this study it often refers to the use of various research approaches such as Content Analysis, Observations and Interviews within an Insider/Outsider approach.

National

This is the central headquarters where the Management Team for that Country sits such as the example used here ABC Pty Ltd Belgium.

Regional Head Office

This is the central regional headquarters where the Executives and Senior Management Team covering and controlling a group of countries sit with examples such as Europe, Asia-Pacific, Americas and more within an example such as ABC Pty Ltd European Head Office.

Regional Trainer

The trainers that provided training for the operations function at this regional level within an organisation were often called Regional Trainers.

Third Space

An independent space where two or more entities come together to create a third new entity. An example often used in this study is where corporate culture and learner culture come together to form a new powerful third culture where learning takes place.

Unilateral

A single individual one sided view. Within this study it often refers to the single standard corporate approach taken by organisations to training, leading to the resulting *One Size Fits All* courses and programmes.

PREFACE

How Did I Get Here as a Practitioner?

Throughout my schooling I had always intended to become a school teacher. Educating and teaching children seemed to be one of the hardest things to do but also a role that gives the greatest joy. I also noticed that many of my teachers developed great relationships with students and connected with them on many levels. These connections often reaped great rewards, the most beneficial being the so called *light going on*, which occurred when the student understood what was being taught and could then facilitate their own solutions by applying their newly found competence to various situations.

After finishing school in grade twelve in 1985, I was unsuccessful in my attempts to enter tertiary studies (to become a teacher). Therefore, I entered the workforce. I worked in the banking sector for four years scrimping and saving to accumulate enough money to go and see the world; this I managed to do in 1989.

When I returned home to Australia from my four month European trip in late 1989 – a bank teller’s wage only takes you so far in Europe – I realised that at the age of twenty two I needed to stop floating from role to role within the banking sector and determine for myself a career that I would enjoy. After all, there were still decades more of work ahead, and if I wanted to travel and learn more from the world, then I needed a job that paid more and also one I could enjoy doing for eight hours plus per day. Most of my friends had attained places at University and were now completing their first Degree or into their Masters so I was well out of touch with them and their world, even though we still met regularly.

I finally made the switch in careers and moved away from being a bank teller to becoming an Information Technology (IT) help desk support officer in 1990. This new career not only came with the IT wage increase but also came with a need for studying at TAFE (local technical college) and developing my skills within the computing area in which I was highly interested. As I began travelling and taking personal computers (PCs) across Sydney (in my IT role) from location to location and setting them up for the users, I also began showing the users more and more how

to not just turn the PC on but also use the software that came with it. The more I installed, the more time I took to show users how to use operating systems like DOS and Windows along with applications like WordPerfect, Lotus and even Dbase IV. The more new software came out the more I stayed back at work to learn each night about it so I could show my users.

Eventually the IT Trainer who had worked in the company left, and luckily I had been sitting next to her manager long enough for him to notice that I not only liked to train but may be good at it. Therefore, in 1992 I became the IT Trainer and my career as an educator – though not my dream as a school educator – officially began (even though later it dawned on me that I had been unofficially educating when installing PCs in 1990.)

With the new career also came great support from my manager who allowed me to attend two afternoons per week at the University of Technology Sydney (UTS) in 1992 to study for an Adult Education Diploma. So as an adult student at the age of twenty five I had finally entered into university, much to the amazement of family and friends who thought that university was only for those straight out of school. Then to my amazement as well I found I was the youngest person in my class as most of the students were highly experienced adults who were studying as part of a requirement of their profession as either trainers or instructors within the police, ambulance, fire brigade, nursing or other vocations. These class mates were equally my teachers, as much as any of the lecturers were, as my class mates taught me that the theory we were learning at the university, in many cases, had to be tempered to meet the reality of the workplace environment.

Over time, I learnt equally from the lecturers, my fellow students, my managers and from my own practice and reflection. This led to me gaining the Diploma and progressing to the Degree where again I learnt more about my trade and developed understandings that even permitted me to question lecturers, managers and others as I felt more confident in my own knowledge and practice as an adult educator. However, as my knowledge within my field grew it was limited to practice within one industry and so I began to move from industry to industry following the cutting

edge of my profession by applying for roles with companies, which were better known for their approach to training and workplace learning in areas ranging from e-learning to virtual classrooms.

Eventually after many years of work, study and practice I had reached a place in my own education and professional practice having completed my Diploma, Bachelors and Masters in Adult Education and also being employed as a Senior Learning and Development Training Manager for a corporation, which involved travelling across Australia. However, I then realised that over time I had developed my own theories and hunches, which needed more structure and clearer development, especially if I wanted to share them with other practitioners. I had also found that Australia (which is my home and of which I am immensely proud) was also limiting my theories and hunches and that I needed to practise my vocation in a different cultural environment such as in Asia or Europe. So it was now time to expand and broaden my work environment within a global company, which would provide the opportunity for me to travel and take my practice and theories to the world.

Luckily in 2002 I found such a company. The penalty for taking on a training role with this company was a massive salary sacrifice that I forever praise my wife for letting me do. The benefits of such a career move were that I could make the world our oyster as the company had plenty of room for me to grow and similarly the opportunity for my family and I to travel.

Within three years, I had travelled across the globe and learnt from colleagues and practitioners, across much of Asia including China, Korea, Japan, Malaysia, Indonesia, Singapore and India. Many of these colleagues were deeply into their own practices. My crazy theories and hunches changed as a result of listening and learning from them all. Similarly, I was able to share and give them of my limited experience, which they were always willing to accept, and to share their feedback on how well or not these ideas were working in their countries. A deep level of respect and tolerance was achieved over these years, which magnified my previous learning and practices infinitely.

As much as it was always nice to come home to Australia after my work travels, I needed something more and began to crave not only to travel but the chance to live overseas and immerse myself fully in another culture. In August 2005 I was lucky enough to land a role as European Operations Training Manager and commenced this role in February 2006 based in Europe. This was the role that allowed me to immerse myself in many cultures and work with training practitioners from over 30 nations. Similarly, through this role I was able to establish a global network of trainers from Asia to the Americas and more recently in the Middle East. It has been this role that brought me to the current point of my work and academic career.

This thesis is delivered from the viewpoint of one who is standing on the shoulders of giants, who include all the trainers I have worked with from my early days at Mortlake in Sydney with the plumbers and fitters to the more recent European and Global teams I worked with from my then European home-base.

1 – THE PROBLEM

Objectives of this Chapter

This chapter provides a basis for understanding the research and its context, being a study situated within workplace learning in an existing global corporation. A setting for the study is also depicted in terms of the development of workplace learning and its growing convergence with personal learning. This setting is also considered against the changing backdrop of corporate education, fuelled by globalization and the need for skill acquisition to proceed at a more rapid, flexible and adaptable pace, highlighting the circumstances in which workplace learning and trainers now must operate. The chapter introduces the study in terms of the basic questions that it is seeking to answer:

Can practitioners improve current corporate training practice in an intercultural setting by exploring the complexity of the learning situation in terms of such elements of that learning setting as third space, colonialism and globalization?

To what extent do elements such as learner identity, blending cultures, and third space have on corporate learning situations? And similarly to what extent do current unilateral corporate training practices impact learning?

The justification for the study is also presented as peers, colleagues and corporate demands for improved practice combined with the researcher's own background to form a catalyst to prompt the study. The rationale for the study is also explored including aspects of the vocational background of the researcher, as a workplace learning practitioner as well as a discussion of some more personal reasons as to why the researcher decided to select this particular study. These include his own colonization as a second generation migrant in the Australian culture and the role the workplace has played in developing his identity and self.

The Case Study method is briefly introduced together with the Mixed Methodology approach within a Comparative Study framework which has been chosen for this

study. The appropriateness of this approach and methodology is also briefly discussed more (in-depth discussion is left to later chapters) in terms of the opportunities that collaborative and dialectical designs provide for greater learning and benefits for learners, practitioners and other stakeholders. Several further research questions are also discussed. These were investigated in the thesis and are reviewed in the context of their contribution to addressing the main research question: What is the influence of intercultural factors in corporate education?

Finally the chapter provides a brief breakdown of the thesis in terms of what each of the chapters will cover. Overall, this chapter sets out to provide the breakdown required for a more considered understanding of the balance of this thesis.

Introducing the Study

Corporate education (particularly workplace learning) has traditionally been in the purview of the employers whether through their own Human Resource (HR) and/or Training departments with their own internal trainers and developers or through external training companies and consultants brought in to meet the organisation's perceived learning needs. Over the last thirty years there have been initiatives and programmes by governments to support the need for skilling national workforces. These ranged (in Australia) from Training Levies to Apprenticeship and Traineeship schemes to the more traditional and commonly used tax deductions for training initiatives. These initiatives and other factors have helped build and develop workplace learning to a higher level than it had been in the past. The result has been that many employers now embed learning into all levels of the corporation. The result has also seen the development of a corporate *educational tsunami* in terms of new and repackaged offerings from Six Sigma (Tennant, 2001) to Organisational Learning (Argyris & Schon, 1978) to Fifth Discipline (Senge, 1990) and recently new angles and approaches like Emotional Intelligence (Goleman, 1995) and Organisational Psychology (Jex & Britt, 2008).

From the researcher's perspective what all these initiatives have done, while maintaining a focus on the industrial and technical operations of work, is to increasingly focus upon more personal aspects of learning. This has allowed the

field to progress to a situation where corporate education can focus more on the culture and identity of the individual learner. This area seems to be at the core of learning, which over the years has been revealed as we tear off - like an onion - the layers of industrial, technical and generic personal learning. This process allows progression to the last layer at the core of all learners' abilities to learn and that is the ability to use and draw on their own culture and identity.

The researcher's view is that to date the attempt to progress to this layer has been somewhat difficult as if it was approached too early and clumsily it may well have been seen as a clandestine attempt by corporations to link into an area of learning that is personal and sacred. Over the last thirty years, so called *developed western society* has become more reflective about itself through the development of self help guides, *pop psychology* and self actualization projects. This process has seen a rise in personal vocational development at a corporate educational level, primary and secondary educational level (with a project based learning approach occurring at some primary and high schools and vocational traineeships occurring at high schools across countries such as Australia) and traditional tertiary educational institutes as well. The result could make any corporation relish the plethora of workers coming *job ready* (at least project and time management ready) and equipped to perform. Similarly, as work projects are tied in to scholastic projects there is a *triple-treat* effect for the employee. This effect sees the employee first gain accreditation through university, secondly attains a bonus through work and finally achieves the satisfaction of personal accomplishment and success. There is no doubt that a "*colonization of life-worlds*" (Habermas, 1987), is occurring and is now interwoven in the fabric of our society with many people putting personal life on hold in order to attain vocational success.

Therefore, the opportunity to work with learners' culture and identity could still be seen as a veiled approach to attain a quicker means to an employer's ends.

However, it is a practice that many employees would be willing to adopt in order to better identify their own personal learning style, to become more conscious of it, and then use this to develop themselves (both personally and vocationally). It is also true that an approach to learning that focuses on the learners' culture and

identity could also be seen as a more humane way to develop an education process that is no longer built on a *One Size Fits All* model but is more intuitive, working as it does with the learner in a more collaborative manner.

The Research “Hunch”

The researcher also has a personal motive hidden behind a hunch that there is a possible key to employee learning that is still yet to be fully understood by corporate education. This hunch is that:

Corporate Education may be able to fast track learning by working with employees/learners culture and identity.

and

By doing this corporations may also be able to transfer this learning to other areas such as process improvement.

Further to this, the question develops as to whether there is a space where the corporation can take the best from itself (the corporation) and then with the help of the employees' culture and identity form a third space where learning by both parties can better take place?

To be able to identify if this may be possible, a case study of a corporate education programme is required. This study could be accomplished through a comparative study of the single course within an English-speaking environment and culture and the same course within a non-English-speaking environment and culture. It should then be possible to draw out of the two contexts:

- how the course is interpreted and used in both;
- whether the stakeholders involved in the course worked within the boundaries of the course approach, curriculum and more;
- whether the stakeholders moved outside of these boundaries to be able to best explain and use the course in a more optimal way.

In other words, whether or not sticking to a corporate *vanilla* (plain) version for all is an ideal approach that works globally or whether some level of local variation is required (whether it be by country or province for example) that is tailored to the

local situation (whether this be cultural, environmental or educational) so that the eventual uptake of the training is improved. The study, therefore, provides an additional level of local interpretation for a course that goes beyond just translating the course to the local country language, as like a meal, it endeavours to identify if *vanilla* is the only flavour or does mixing it with local ingredients improve not only the flavour for the local palate but also speed of uptake and longer term improved digestion and retention.

The Approach

The course chosen for the study is one currently operational within the Transport and Logistics field that focuses on technical leadership within facilities and branches. The course was in use throughout Europe and had also previously prevailed throughout Asia Pacific where it was originally conceived and developed. The course provides a great deal of content as it covers approximately five days and includes several course modules covering aspects such as technical, teamwork, leadership, corporate and commercial competencies. The research employs a critical case study that applies a content analysis approach to the technical leadership programme, supported by an Insider/Outsider strategy that not only involves the researcher, but also includes interviews with observations of other participants and organisational stakeholders involved in the process.

The argument for using the critical case study approach as discussed by Cohen, Manion and Morrison (2000) is strong, as such an approach can focus on corporate and learner practices, whilst investigating the relationships amongst the existing environments and circumstances, along with aspects of the programme and its requirements and outcomes. The critical case study approach can also provide a higher degree of meaning and value to the researcher whilst meeting practitioner requests for research and analysis that addresses their practical concerns.

The adopted methodology thus meets the need to engage with the field and its practice. Recent work conducted by the researcher in the professional, academic and workplace domains and similarly by others such as Solomon, Boud and Rooney (2004) has highlighted a critical need for individuals who are working in the field (as

practitioners) to investigate issues relating to key practical concerns and theoretical perspectives, so that they can provide crucial insights and feedback into both practice and theory. This study hopes to show that this is not only possible but also seeks to provide a guide or a template for other practitioners in the field to transfer from this study in order to better study their own work.

Another key feature of the adopted methodology is that it focuses on benefiting those who are participating in the research. This occurs through a personal re-interpretation of their situation by them being directly involved in that process and thereby becoming more empowered. This has a connection to the ownership aspect of the methodology, as those participating may eventually take responsibility for owning this study's proposed practices and the resulting theoretical bases. An Insider/Outsider perspective as discussed by Merriam, Johnson-Bailey, Lee, Kee, Ntseane, and Muhamad (2001) provides the means for this aspect of the methodology to be implemented through participant, practitioner and stakeholder involvement.

The Insider/Outsider approach in particular provides the intimate insider, implicit, practitioner subjective perspective whilst allowing the external visiting outsider, explicit, auditor, (almost) objective perspective that the research requires when dealing with the organisational content. This Insider/Outsider approach provides the "*emic and etic*" view discussed by Brislin (1976) that the research methodology needed for it to have greater credibility and validity within the corporate domain. Insider/Outsider is crucial to the methodology as it draws out possible latent beliefs through the interview (reflection) process so that the researcher and the interviewee become more aware of these beliefs. The process of using insiders and outsiders is effective because of the differences in the experience history of these practitioners broadening the available perspectives and maximising the potential interpretations of observed behaviours thus helping build a higher level of robustness.

Moreover, the mixed method approach provides a multi-step method to review and redress findings that can contribute to a level of durability as discussed by Clough and Nutbrown (2002). Durability is also maintained through the ongoing inclusion of argument and counter-argument coupled with informative critique, which allows

the research to maintain a balanced position whilst meshing views and positions that add to and strengthen the overall study's process.

Building further upon this balanced view and in line with the attempt to move from a dichotomous to a more dialectical practice, the methodological process that has been adopted should ensure that the researcher lens is widened through consultation with other practitioners, who are also able to ask questions regarding the existing situation, the effects that are being felt, any trends that are emerging and to track how the events that created the current situation have developed. This approach not only adds further to the study's robustness, but also creates an environment for optimum participant and stakeholder collaboration and critique, thereby allowing for the eventual acceptance and ownership of recommendations for transformations in policy, programme and practice.

Though the focus of the research will be global, the case study will concentrate on English-speaking and Spanish-speaking cases where the researcher has access to the programme and all relevant stakeholders including practitioners and participants. While the research adopts a comparative education framework, the researcher is careful of the need to theorise and carry out the research without falling into the trap that Becher (2004) discusses as culturally "*essentialising categories*", which could forego the importance of a critical cultural comparative study for a different type of significance (to researchers and practitioners) possibly more mainstream listing and celebration of cultural differences (which is just as important and significant but not necessarily the angle that this study is looking to take).

Justification of the Study

The trigger for this study stems from the concerns of the researcher regarding those factors that could enhance learning in intercultural educational settings within global corporations. Based on an initial and admittedly far from comprehensive survey of the literature, which was undertaken by the researcher, there appears to be a lack of information on this topic, furthermore, the little that has been written about it, does not appear to be grounded in any real research evidence.

Peers and colleagues within the workplace, the industry and the wider professional field have also highlighted the significance of the topic in terms of the training and cultural problems that currently exist. Such comments point to the need for research and exploration in order to begin to identify some theoretical principles and a range of improved practices.

The significance of the topic can also be seen through the lens of corporate education generally, which is facing considerable pressures, ranging from globalization through, *How do we implement effective E-Learning?* to the need to meet mandatory legal compliance requirements. There is a need to identify training practices and learning processes, which will facilitate more complete competency acquisition across contexts, countries, cultures and identities. Furthermore, the need to achieve such competence in an effective, efficient and rapid manner is of great importance to the corporate sector, which has expressed high interest in this study.

As globalization intensifies, the challenges that practitioners face within the work environment, regarding the lack of understanding and tolerance towards cross-cultural differences, are escalating, thereby creating urgency for studies that can lead to a better understanding and appreciation of the significance of intercultural differences and corporate learning. This study will focus on ways to improve practice, particularly moving away from the dichotomies that perpetuate the traditional or existing unilateral approach to corporate training towards a more dialectical approach to practice, which has a direct link to the researcher's personal rationale for conducting the research.

Personal Rationale

Idealistic as this may seem, the researcher's ultimate aim is to improve the way corporate trainers educate, making the process more engaging, through the development of a more reciprocal practice between learners and their corporations. This would mean that current corporate training practices will no longer follow the practices of non-engagement with participants on topics not within the parameters of the curriculum, and of strictly adhering to a single path to achieving employee competence. Instead the study aims to improve the situation so that practitioners

will have a broader scope to explore participant issues and a time allowance within the programme to work with the multiple learner identities to attaining competency within various spaces and timelines. Of possible greater significance is the effect that this research may have on a corporation's willingness to investigate and work more meaningfully with the cultures and identities of its employees to improve understanding, tolerance and acceptance, as well as the corporation's bottom line.

On a personal level the importance of tolerance has grown for the researcher as his research has progressed and the researcher has gained a greater understanding of his own identity as part of a migrant group, who have had their own experiences and past cultures diminished through intolerance, racism and lack of acceptance. What the researcher is trying to do is to help, by his study, to reduce the loss of local culture and personal identity as corporate life becomes increasingly globalized. In addition and – as naïve as it may sound – begin to change his profession, and to some small extent the world, using the most influential means he has at his disposal, corporate education.

The Research Question

Considering this justification which, when interlinked with the researcher's professional background and their current field of practice, has led to the following research question which the researcher intends to address.

What is the influence of intercultural factors in corporate education?

The study will investigate a corporate technical leadership education programme module, in the Transport and Logistics industry, where global corporate identity and local organisational culture blends with country specific cultures and individual employee identity.

Changeability over time characterises workplace situations and workplace learning. This supports the choice of case study as an appropriate methodology for investigating practice at a specific point in time.

(Anon - student from 2005 UTS professional doctoral class)

The above quote from a Professional Doctoral colleague highlighted the logical and appropriate reason to look at this research as a case study. Realising the need to limit the focus, the research plan is to use the Transport and Logistics industry as a case study. The overall approach taken is a comparative one that compares and contrasts the English-speaking version and Spanish version of the same corporate technical leadership education programme module and its implementation in order to explicate the research question.

Breaking down the topic using the Clough and Nutbrown (2002) “*Russian Doll*” and “*Goldilocks*” tests (which in essence is unpacking the topic like a Russian Doll and then with all contents visible identifying the parts that fit “*just right*” with the study), the key question that the research will address and which will focus the researcher’s study is :

How do intercultural factors operate in a corporate technical leadership programme?

Research Questions to be Investigated

Having unpacked the question there were a number of consequential or contributing questions of which the answers will aid in answering the main question, these include:

Where are learners situated in terms of practice and culture, are they working within a third/other space? What constitutes this space? What is being gained and lost by working within this space?

What is the process to best gauge and measure the affects that intercultural factors have on individual learners? How do practitioners move forward in using and implementing these intercultural factors so they better serve the process of acquisition, implementation and transfer to learner competency?

Can a guide or road-map be developed (in reference to the above questions)?

Can we verify the hunch that practice needs to be based upon using methods and techniques that work with the participant’s identity, culture,

practice and more – third/other space – rather than merely implementing some single space mandated corporate directive where one size fits all? Is there a colonization of work into self? Is this causing a loss of local culture and personal identity?

Having unpacked the topic and research question it is important to consider how these questions will help guide the study and structure the research. Moreover, it is hoped this process will extend beyond the researcher's study so that in some way it can provide a guide and template for other practitioners to use with their own work.

Returning to the questions set out above and in line with the research question, the study seeks to address whether intercultural factors such as; Third Space; Learner Identity; and Culture Blending make a difference in either enhancing or detracting from training programmes. These questions will be further explored in the following chapters which are briefly outlined below.

Chapter by Chapter Breakdown of the Thesis

Employing Levine (2005) who suggested areas of focus, the researcher has organised his thesis in the following manner:

Chapter 1 – The Problem

This chapter lays the foundations for the research question providing the researcher hunch along with his rationale and justification for the study. The chapter presents the key research question for the study as well as the ensuing research questions that stem from this. A brief overview of the approach planned by the researcher to respond to the research question is also given. Finally a synopsis of each chapter within the study is supplied providing a basis to begin understanding the study.

Chapter 2 – Background to the Study

This chapter provides a setting for the study in terms of its location within the corporation and also in regards to previous literature in the area. Firstly it sets the context within which the study took place which was within an organisation, yet it is still presented generically for practitioners to be able to relate. Secondly it aims

to present the work that the study builds upon in terms of past literature. Thirdly, it explains what areas and fields of research have been explored by the researcher. Finally, it also presents competitive and contradictory work.

Chapter 3 – Methodology

This chapter provides an overview of the methodological approach taken including problems and complexities. The chapter also provides a general definition and overview of the approach taken, a description of the data collection and analytical procedure and finally a section that addresses *situated-ness* and *reflexivity*, which seeks to locate the researcher within his research.

Chapter 4 – Findings

Within this chapter what has been observed to be found is set in the context of the research objectives and design and in relation to the broader problem area. The findings are interpreted in the light of the research questions, and discussed in the context of the literature reviewed. Explanations will also be offered along with comments on the research design and methodology.

Chapter 5 – Conclusions, Implications, Recommendations

In this chapter the conclusions to be drawn based on the findings are made and an explanation of this in relation to the overall research is given. Alternative explanations for the findings are made, referring back to the problem posed, and describing the conclusions that were reached from carrying out this investigation. A summation of new observations, new interpretations, and new insights that have resulted from the present work will also be made. An account of the limitations of the findings that were discovered is provided and finally a range of recommendations are made.

Chapter 6 – Reflections

This chapter provides the reader with a more personal perspective from the researcher's point of view. The chapter has at its core a desire to provide a more intimate reflection from the researcher that may assist those who wish to use the study as a template to gauge the personal impact of their own work. The chapter

highlights the critical evidence for practitioners and scholars alike that *reflection* is and should be as much about educational praxis as any other element.

Chapter Summary

This chapter has provided a basic introduction to the thesis. It has focussed on the background of the researcher and the origins of the research hunch along with its rationale and justification. More importantly the research question and its' underlying questions have also been laid out along with the approach that was taken with the research design and methodology. Though the chapter provided all of this information in a brief overview it also explained how the rest of the thesis will elaborate on each of the discussed topics by presenting a chapter by chapter account. Finally the chapter ends with this brief summary.

2 – BACKGROUND TO THE STUDY

Objective of this Chapter

The overall goal for this chapter is to provide details as to the study's context so that it is clear to the reader where the study occurred and who was involved and where the study sits in relation to previous work conducted by other practitioners and scholars in the area of the study.

The current study is designed to identify and explore a possible improvement to the existing practice in corporate education, which looks to a range of factors that impact intercultural learning. To show this it is important to set out in this chapter the organisational environment within which this study takes place including the key stakeholders involved, as it is significant to understand the study's location and setting. It is also critical to make it clear the areas and fields of research that have already been explored in the specific area of this study as this too is important background to the study. The chapter also includes a brief discussion regarding the contribution this study may make to the literature. In short this chapter provides what could be considered the tangible (organisation and people) and more intangible (literature review) background to the study.

Historical Overview of Organisation and Stakeholders

It is important to provide a setting to the study in terms of where it took place and who was involved in a general sense. To do this there first needs to be a discussion of the stakeholders. Once there is an understanding of the stakeholders then their place in the organisation can be mapped. It is equally important to note that this understanding is solely based on the researcher's perception of the situation.

Stakeholder Background

The following attempts to set out who are the stakeholders and importantly what is their role. It provides an outline of stakeholder status as part of the background to the study. It is provided because each stakeholder has a role in the study which is discussed along with the researcher's perspective on this role within the study.

(NOTE: The context of these roles will differ from situation to situation and

organisation to organisation but for this study the positions they hold are in context to the researcher's view. Therefore the definition provided is not a text book perspective but more a generalised explanation across situations and organisations based on the researcher's perception.)

Trainers

This is the group of people within an organisation that are charged with providing corporate education and information to employees so they can perform their work to the required levels. Often this group are micro-managed to train prescribed doctrine in a frugal and fast manner. This group is usually short on funds, resourcing, time and in some cases restricted on any level of creativity that may enhance learning or similarly encourage creativity outside of the strict organisational parameters. Yet this group have the best opportunity to act as change agents for both trainees and management if the organisational paradigm that often exists regarding their role and responsibilities was viewed differently by others.

Trainees

This group represents all those staff required to acquire knowledge and skills to a required competence level to better perform their role. Unfortunately, sometimes seen as a mass rather than individuals by some in management, these are the people who provide for the basic day-to-day running of business within corporations. In terms of learning they are usually expected to learn all skills within a timeframe that is often tight and then operate at an ongoing, escalated performance rate. Their experience of corporate learning is often mandated and their adoption of training programme content is similarly often rote in some cases with a minimal level of time for their own digestion or comprehensive understanding. These people provide the greatest leverage point for management to foster innovation and change facilitating the organisation to higher levels. However, the missed opportunity by management to connect with this group and their preference in some cases to continue to see trainees as merely *a mass* diminishes any chance for ingenuity and greater corporate prosperity.

Managers

A group that is generally more experienced and more knowledgeable and therefore able to control, supervise and manage the employee level they are in charge of.

Expected to be adept at people skills, this group of people are expected to perform more work than others, provide motivation and incentives to those they manage and all the while ensure business turnover keeps improving. Not usually provided with many opportunities to develop their skills, they need to perform a role that is seen as the key on-the-job training function provided for all staff. Yet in some cases the managers are not equipped or provided with any competencies to do this. The role also often goes to an employee who has been in the company longer than others. When things go wrong, this role is often expected to resolve all issues or take the responsibility. Yet again it is a role sometimes undervalued by management at higher levels, as in some cases little time or investment is made into this critical people conductor role.

Executives

A group that ultimately sits at the highest level of the organisation. Their training and education has often been external and in some cases their approach to corporate education is that it is not something that is necessarily required to be done at work. However, their view, in many cases, is that most trainees (employees) education and training can be done on-the-job as their skill requirements need hands-on time and development to fulfil their basic day-to-day role. Similarly, their view of managers is that their training comes from on the job experience and in some cases anything else can be gained from their interactions with executives. Some executives also believe that if anyone wants more education they should go and obtain it externally as they did and that the organisation is neither a school nor a place to be paid and educated on work time. A few executives also believe that if they educate and train the trainees and managers then these people will realise they can do more and may expect more money, promotion and leave for either of these elsewhere (possibly a competitor). This group is where the pride of most companies can potentially begin to take a detrimental effect as the *them* and *us* attitude acts to separate this group and the higher echelons from the previous discussed trainers, trainees and managers. It is also in some instances where the *fear* sets in as this

group of executives become the publicly accountable and responsible officers of the organisation and hence more answerable to their master the shareholders.

Customers

These are the buyers and *bread and butter* of any organisation. Without these people nobody else exists as they provide the revenue that leads to profit and survival.

Shareholders

These are the people that own the organisation. They are often referred to by the executives as the most important element in the *game* along with customers. Yet they are sometimes made to look as if they are solely *money-focussed* entities that can sell and bring the company down. However, in many cases they are the every-day people who make up the bulk of society and may for the benefit of their own investment either directly or through their superannuation/pension funds, prefer organisations and executives to juggle the employee, shareholder and customer balls equally.

Practitioners

Those who are entrusted as trainers, supervisors, managers or other with the task of providing education covering company requirements. This group often go above and beyond this by providing further educational options that allow trainees to delve deeper into their own work, their place in the scheme of things and similarly realise their identity as a learner and their capability to continually learn and develop. Often these are the trainers and managers already previously discussed, however, in some instances within organisations practitioners operate at all levels.

Scholars

The group of academics who often provide practitioners with challenging questions regarding their practice. Not necessarily fully familiar with work of practitioners – nor in some cases wanting to be – this group continually break through barriers and enter realms that practitioners in some cases unfortunately do not have the time - nor in some cases a similar inclination - to discover or pursue. Their work is sometimes misunderstood and this in some parts may be due to their higher level of

conceptualization which may require a greater level of real reconnection with practitioners if they do not wish to possibly become distant to the field of practice.

Researchers

This term signifies the cross over point and meeting place for both practitioners and scholars to come together. Unfortunately, often is the case that both these groups stay within their own field without entering the other; that the scholar rarely enters the practitioner domain and the practitioner rarely enters the scholar domain. The great opportunity for both to *cross swords* and assist each other is substantial, however, there still seems to be much to be done to create this interaction.

Government

This is the institution that runs and manages the country. Often elected by popular vote, government has the greatest potential to ensure that change can be made at all levels from business to academic. The position government takes through policy can and will often make an impact across all fields and with all stakeholders. Similarly the inactivity or laissez faire approach – of trusting corporate and industry to set the educational directions – that has occurred in some cases with some government administrations has led to corporate educational cutbacks and neglect. Sometimes this may lead to short-term gains in performance, productivity and profit but longer-term inadequacies in the ability as a national workforce to innovate, create and globally compete.

Considering the above stakeholders there is a definite picture that begins to take shape. The picture is one that if painted correctly could allow companies, scholars, practitioners and more to influence government bodies and similarly for government bodies to create legislation and policy to ensure that business, academia and others not only enrich corporate and economic profitability (to the benefit of customers and shareholders) but also the richness of education and society overall.

The researcher believes that corporate education can do more to ensure characteristics such as tolerance, empathy and real understanding can begin to form and to grow across the corporation and society leading to what can only be a greater level of

understanding and knowledge for all. This rich education provides an underlying platform that can lead to acceptance of other identities and cultures. Similarly, as we begin to accept and incorporate other identities and cultures into our existing lives and culture we begin to see how others may perform and enact their lives which are different to our own. The researcher's view is that it is through the lens of others that we then begin to identify and view their world and see the richness and texture of their own understandings. When we then take off their lens and again view the world through our own lenses we begin to see the prejudices, bigotry and differences seem trivial and pointless.

Finally it is then by combining the lenses of our own world and the lenses of the others that we have the opportunity to make changes that are ground-breaking and innovative and which lead to the greatest rewards. The researcher believes that this can better come with an ability to educate and learn from others with no limits or restrictions so as to fully engage and understand each stakeholder's perspective. He holds the view that through co-operation between and among the stakeholders, change can come about. Ignoring the stakeholders is paramount to allowing the study to go owner-less and without liability and responsibility to move forward. It is only by naming names and identifying all stakeholders and their current format that change can occur. Through naming it is the responsibility of all to identify their own position and seek to change and possibly rectify their role so that it provides a greater enabling opportunity for others rather than being a disabling element.

With the stakeholders identified it is important to paint the canvas upon which they now sit which is done within the next section of this chapter.

(NOTE: The context of these roles will differ from situation to situation and organisation to organisation but for this study the positions they hold are in context to the researcher's view. Therefore the definition provided is not a text book perspective but more a generalised explanation across situations and organisations based on the researcher's perception.)

Organisation/Company Background

This entity similar to the stakeholders needs to be defined before progressing further as it sets the canvas upon which the stakeholders sit within.

Organisation/Company

The business that provides employment for all employees (Trainees, Trainers, Managers, Executives). It binds all the internal stakeholders together as they all strive for the same goal of profitability, yet it similarly could potentially become the nemesis of all stakeholders. It may become a nemesis by way of preventing growth, creativity, innovation and development as those who manage and direct the business could become fearful of damaging it in any way and therefore fail to empower others to develop it beyond day to day operations. It is impacted by stakeholders such as government bodies, customers and is ultimately accountable to shareholders who via the marketplace determine the organisations value and worth.

With an understanding of the organisation/company and the stakeholders it is important to combine them to provide their context in the overall scheme of things. This also provides a picture for the study's location as Diagram A demonstrates. Note that when looking at Diagram A, the researcher identified that the study overlaps the organisation, trainers, trainees, managers, researchers, scholars and practitioners. Though stakeholders such as shareholders, customers and government bodies are not directly located within the area of the study their direct influence upon the organisation (and others) has an indirect impact upon the study.

Diagram A provides a simple organisation chart that has been designed so that it can be seen from two perspectives for this study. The first of these perspectives has the researcher acting as the English speaking trainer and his colleague acting as the Spanish speaking trainer with both sitting in the role of trainers (of which in this study there are two regional trainers). Within this same perspective the country trainers act as the trainees who are undergoing a train the trainer process to learn the content of the programme module that they will eventually train (which in this study there are a combined total extending to thirty five country trainers). All other

stakeholders are therefore in context to this scenario, so that the managers and executives would be regional head office management.

The second of these perspectives sees Diagram A take a different position with the country trainers taking on the role of trainers and the trainees being the employees within the countries. The main change being that the managers and executives alter to become the leaders of the country trainers, representing the country management team.

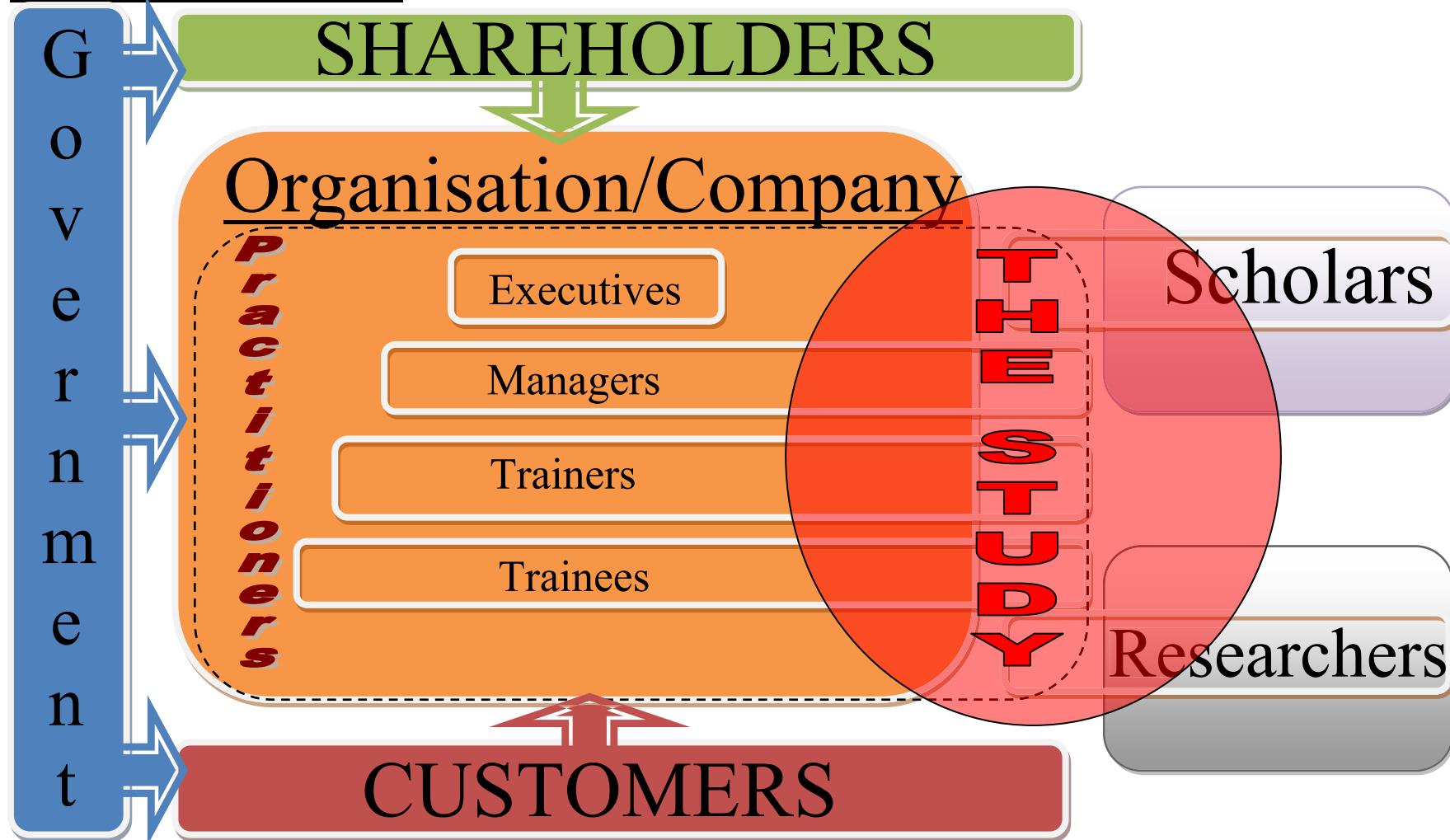
In providing two perspectives the diagram demonstrates that there is often commonality amongst trainers at different levels of the organisation than there are differences. This is part of the fabric which often helps these two separate groups of trainers combine and converge as their cause is the same, being to train knowledge and skills leading to organisational competency. Similarly, the researcher sees both groups having a higher authority pressing down upon them to complete their tasks with limited timeframes, staff and resources yet all the while providing greater results. Such common pressures and stress is what has helped the regional trainers and country trainers almost bond to become a united force constantly drawing on each other for assistance to make ends meet. An example of this is how regional trainers will, where possible, develop videos and e-learning programmes to help country trainers disseminate their message quicker. Similarly, country trainers will individually and at different times provide tools such as Quick Reference Cards and Self Guided Sheets to the regional trainers who then translate, where possible, and disseminate to all other country trainers.

Whilst an organisational chart provides a more detailed view of the company structure and stakeholders, Diagram A, provides a more realistic view of the key stakeholders, landscape and pressures in relation to this study. Similarly, in providing two perspectives it also provides practitioners with a guide of where their study can similarly be situated whether at a regional or head office practitioner location or at a country practitioner location, hopefully such a diagram aids practitioners to take an interest in landscaping then studying their own work.

Against this backdrop the research question can begin to be over-laid as the researcher is looking to examine and investigate a programme module within a Spanish speaking context and then within an English speaking context to compare and contrast the two to be able to draw out intercultural factors that may impact corporate education.

In considering the two perspectives previously discussed the research question similarly begins to take hold from regional trainer to country trainer and then country trainer to trainee/participant. This again provides a doubling effect for practitioners to consider when working on their own area of research, hopefully making Diagram A, a template for their consideration.

Diagram A – The Study's Location



Historical Overview of the Literature

Conducting a research literature review in the particular area of this study (*The influence of intercultural factors in corporate education. A case study from the Transport and Logistics Industry*), was difficult as the researcher's investigations revealed that there was little or no specific material directly available. This is not to say that there is not an abundance of material available concerning adult education, as much of great value has been written on this area which is discussed below.

It is interesting to note that an online search for the term *adult education* brings up many varied definitions and articles. General internet encyclopaedias for instance provide vague and general perspectives of adult education. A more robust definition of adult education can be found through sources such as the American Association for Adult and Continuing Education and their *Handbook of Adult Education* (2010), which provides a comprehensive range of discussions covering theory, practice, field, diversity, social justice and future directions of adult education. Juan Ignacio Martínez de Morentin de Goñi in his work *What is Adult Education? UNESCO Answers* (2006), provides possibly the most comprehensive definition of adult education in a global context as shown below:

Adult education is a multidisciplinary process oriented to favour lifelong education for all, as well as efficient learning throughout life. It aims to provide the knowledge that improves professional qualifications and to achieve civic, social, moral and cultural attitudes and skills for performing responsibilities and for progress in all spheres of life.

It is based on justice, on the disposition to favour the understanding of cultural aspects in human evolution and the cooperation of international peace, carrying out a process of teaching-learning that tends to harvest an open mind, a way of understanding human relations, a way of seeing the world, a spirit, an attitude, a mental disposition and an ethical character.

It tries to balance the importance of technical knowledge and professional requirements with the full development of the personality. It pursues improvements in education to provide knowledge and to favour training that guarantees equal opportunities to life, adapting to the needs of individuals of all ages, with the aim of arming them with the capacity for a critical understanding of the world and its changes. It pursues fomenting the positive valuation of active participation in civic life and in social and economic development, adapting to the aims of development within the community in line with satisfying the needs of contemporary societies.

It tries to enable the relations that unites man with their environment and culture; to favour the respect towards diversity of cultures and customs; to foment the interest of creating new material goods and new spiritual and aesthetic values; to raise the cultural level in developing the critical understanding of the principal social problems; to improve the capacity of self-esteem, by facilitating individual survival and the ability to be happy.

It attempts to prepare individuals so that they may perform multiple functions participating in the life of their community and in the international community with the spirit of mutual appreciation of cultural values.

(Juan Ignacio Martínez de Morentin de Goñi, 2006 p.119-121)

The researcher also cites Merriam, Cafferella and Baumgartner's work being *Learning in Adulthood* (2007), which whilst providing a comprehensive and varying perspective on adult education also includes that:

Adult education has been variously divided into formal, nonformal, and informal learning activities.

(Merriam, Baumgartner, & Caffarella, 2007 p.24).

Building further upon the concept of adult education being divided across a range of situations (formal such as schooling, non-formal being learning within a formal

setting but not recognised and informal such as library) the notion of adult learning is further developed as below:

Learning is a process that brings together cognitive, emotional, and environmental influences and experiences for acquiring, enhancing, or making changes in one's knowledge, skills, values, and worldviews.

(Merriam, Baumgartner, & Caffarella, 2007 p.277).

The researcher being an adult educator for over twenty years, with corporate training being his field of practice, is also able to report further on the study of adult education. To begin with, the term that the researcher often prefers to work with when discussing the study of adult education is *Andragogy*, as defined below:

We use the term andragogy to label the academic discipline that reflects and researches the education and learning of adults. By this we emphasize the differentiation between the field of practice (adult education) and the scholarly approach (andragogy).

((2003) Prof. Dr. Jost Reischmann. *Why Andragogy?* Bamberg University, Germany, retrieved in 2010 from: <http://www.andragogy.net>.)

Further research and readings show that andragogy is a term that dates back to 1833 when it was first coined by Alexander Kapp. It can be seen that the term came just after the end of the Age of Enlightenment period demonstrating that there was already a rich background within Europe regarding worker education and development. However, it is the 20th Century that provides the setting within which andragogy would grow deeper roots, develop, blossom and then begin to wither but not die.

Prior to World War II, andragogy was still only in its' infancy with few people outside of Lindeman (1926), Flitner (1928) and Erdberg (1919), working with the idea of the study of adult education. During this period of time these and other scholars were not only involved with the practice of adult eduction but also studying, writing about it and meeting under the title of the Hohenrodter group from 1923 to

1930 to discuss adult education as a discipline. Yet these early initiatives did not warrant andragogy being regarded as a recognised field.

It was the post World War II, period that saw andragogy truly take off as a discipline first with Franz Poggeler (1957) and his book *Introduction to Andragogy* which was adopted by practitioners across Europe. Then in the late 1960s the idea of andragogy took hold in the US with Malcolm Knowles (1968), his definition being “*the art and science of helping adults learn*” (*The Modern Practice of Adult Education: From Pedagogy to Andragogy, p43, 1980*).

Knowles (1968) based this definition on two key attributes. The first of these is that adult learners are self-directed and autonomous, whilst the second is a focus on the teacher being more a facilitator of learning instead of a lecturer or disseminator of content. Knowles’ initial work was instrumental in establishing the term andragogy, in the English speaking world, as a respectable field of study that was separate and distinct to pedagogy (child education) and therefore requiring its own terms of reference for practice.

Knowles was, of course, not the only one during this time who was working with andragogy as it was actually Dusan Savicevic (1991) who in 1968 alerted Knowles to the term andragogy and that though the term was not widespread in the US, the study of adult education was then a growing discipline. The fact remains that andragogy was taking off globally during the 1960s. From as early as Simpson, who in 1964 had published *Andragogy - Adult Education* in the United Kingdom, through South America with Paulo Freire (1968) *Pedagogy of the Oppressed* and other proponents within Knowles own country of the US.

The practice of adult education has a long history in the US especially in the twentieth century. Many early American adult educators were concerned with working with the poor, the immigrants and people of colour. Just one example of these adult educators was Myles Horton. Horton (1991) who had been working with the poor in the Appalachian region (since the 1930s) and during the 1960s worked with many people on civil rights including Civil Rights Leaders Dr Martin Luther

King and Rosa Parks. It was also during this time that insights from other related disciplines entered into the adult education world with the likes of Carl Rogers (a renowned humanist psychologist) and his work (1969) *Freedom to Learn*, which was as enlightening as it was educational to adult educators.

It was during the 1970s that andragogy as a term began to take hold within corporate training building on Knowles work and later Ingalls (1972) publication *A Trainer's Guide to Andragogy*, becoming a template guide for practitioners. Then in the 1980s proponents of more reflective practices such as Mezirow (1981) presented a charter of 12 actions that adult educators needed to carry out, in order to ensure quality learning. This provided again another dimension and guide for practitioners within the field to use in their day-to-day practice. During the 1990s was the time when this study's researcher entered the field of corporate education/training as a facilitator, which continued well into the 2000s as a Training Manager. It was during this time that the researcher also discovered not only the previously discussed andragogical works but also more contemporary authors such as Merriam and Brockett (1997) and their work *The Profession and Practice of Adult Education: An Introduction* and Rachal's (2002) work *Andragogy's Detectives: A Critique of the Present and a Proposal for the Future*. Australian universities and colleges during the 1990s and 2000s also provided curricula, programmes and courses for practitioners (mainly at night as during the day these practitioners were in the field training/educating). It was during the 1990s and 2000s that this study's researcher studied adult education within the Australian setting at the University of Technology Sydney and also learnt much working with local scholars of andragogy and practitioners of adult education, many of whom had solid international reputations.

Unfortunately during the 2000s the concept of andragogy possibly stalled as a discipline with colleges, schools and universities globally seeing less demand for adult education as a field of study. During this time the advent of e-learning was well and truly being considered within corporations and new concepts and theories were being advanced such as a move from "Andragogy" to "Heutagogy" as described by Hase and Kenyon (2001) "*Moving from andragogy to heutagogy: implications for VET*". Whether such new concepts will be found to be useful or not is not the focus of

this study. However, the topic and field of andragogy, particularly within corporate training and education, may be considered to be in a trough, but is far from finished.

It is similarly important to acknowledge that the field of adult education consists of many other practitioner facets which are developing and evolving such as the area of situated learning. Situated learning has been defined by Brown, Collins and Duguid (1989) as:

... a learner executing tasks and solving problems in an environment which reveals the various intended uses of the knowledge.

(Brown, Collins and Duguid, 1989, p32-34.)

The evolution of situated learning has seen it develop to more recently include:

- acceptance of the position of domain-specific knowledge and that knowledge and skills are embedded in the conditions of its application;
- learning is a social process; and
- activity is key to the development of knowledge, skills and competence.

These points highlight the importance of situated learning within the adult education field as a form of practice that can be evidenced through practitioners such as Billet (1994) and his work titled, *Situated Learning - A Workplace Experience*. Billet through his research was able to demonstrate the importance of situated learning within a mining and secondary processing plant, concluding that:

When participants were asked to rate the efficacy of the elements of the learning system in two different ways, consistent outcomes were reported. The consistency resided in the support provided to aspects of learning situated in a culture of practice. This data emphasises that when learning was disembedded from authentic activities and social relations it was perceived to be markedly less effective.

To conclude the data gathered in this study suggests that learning arrangements which are situated in a setting of a culture of practice, is not, by itself, a sufficient quality for the optimum appropriation of skills and

knowledge. Rather, for situated learning to be effective it needs to be embedded in the authentic activities and social relations which comprise cultural practice. This does not exclude instructional interludes to deepen an understanding of vocational activities, but suggests that learning activities which fail to access and engage in a culture of practice are less likely to be generative of effective learning outcomes. (Billet, 1994, pp.21)

It is clear that there is more than enough literature related to adult education both as a field of practice – and within this the multi-faceted areas of practice such as situated learning – and as an academic study, and that there is a solid body of literature dealing with training and human resource development. It is also clear that the issue is more that there is considerably less material directly related to technical leadership education within the Transport and Logistics Industry. Considering this the researcher broke down the area of study into parts and was then able to conduct a further literature review that is discussed below.

Conducting a literature review on a break-down of the areas of interest of this study led to consideration of a range of concepts that were constructed and refined over the initial years of the research journey, a process which crossed several fields and reviewed a number of key references, these fields are outlined in Table 1 below:

Table 1 – Key References

Spatial Places	Comparative Education	International Education
Identity	Cross/Intercultural Education	Cultural Competence
Corporatisation	Knowledge Economy/Worker	Commodified Knowledge

The key references of identity and culture are important to discuss as they were not only initially identified as constants throughout all literature, but they formed the basis for further analysis which later lead to the identification of more elaborate concepts that enhanced the study.

Identity as a concept can be seen as many thing from the characteristics and attributes that make up an individual to their deeply rooted ancestral heritage. In relation to this study however, a more relevant definition comes from Stuart Hall (1993) and his work on Cultural Identity and Diaspora where he explains identity:

Identity is not as transparent or unproblematic as we think. Perhaps instead of thinking of identity as an already accomplished fact, which the new cultural practices then represent, we should think, instead, of identity as a 'production', which is never complete, always in process, and always constituted within, not outside, representation. (Hall, 1993, pp. 392-401)

In the context of this study the concept can be further developed to consider identity in context of the learner, therefore, under the form of learner identity. The researcher realises the strong relationships between learner identity and education, as it is often through education that identity is formed. This is explained further through Coll and Falsafi (2010) and their work on *Learner Identity an Educational and Analytical Tool*, where they describe learner identity:

We suggest that the concept of learner identity is a symbolic mediating resource that should be systematically and methodically managed in educational practice. We acknowledge the close relationship between learning and the construction of multiple identities, and argue that learner identity is the basis for the construction of other identities. Therefore learner identity needs to be considered in curriculum and educational practice in order to promote the construction of favourable learner identities and to improve the management of the interplay between the individuals' learner identity, the educational activity and its outcomes.

(Coll and Falsafi, 2010, pp.211)

Culture (like identity) was also an initial concept that developed further as the researcher delved deeper into the study and realised that there were more elaborate concepts that better suited his research work. Nonetheless it is important to provide a basis for culture from which the researcher progressed, such as that expressed by Triandis and Wasti (2008):

... it is shared behaviour and shared human-made aspects of the society. Thus it includes "practices" [the way things are done here] and "values" [the way things should be done]. (Triandis and Wasti, 2008, pp1-24)

This provides the external elements of culture in terms of what is external to a person. Over the years though it has become more evident that intrinsic aspects of a person also make up the context of culture. The researcher through further analysis was also able to identify a more aligned definition of culture in regards to the study firstly through the work of Triandis (1994)

It (culture.sic) has both objective elements – tools, roads, appliances – and subjective elements – categories, associations, beliefs, attitudes, norms, roles and values. (Triandis, 1994, p.113)

then through Robert et al. (2000), a befitting description for the corporate aspects:

Culture also influences the domain of normative behaviour (e.g behaviour that is desirable versus condemned for members of the culture), defines roles for individuals in the social structure, and prescribes guiding principles and values in one's life. As a result culture specifies how things in the environment - including an organization's practices , policies and procedures - are to be evaluated and subsequent reactions to such procedures.

(Robert et al., 2000, pp. 643-658)

There is further that could be discussed in relation to identity and culture, however these will come later in discussions on the more elaborate key references that make up the conceptual framework within which the study will be pursued.

With the basis of identity and culture considered and also recalling the discussion from the first chapter on the *Topic*, the *Question* and its *Background and Context*, the task of developing a conceptual framework from key references became clearer as the researcher identified a path through the literature which aligned with the research topic and its areas of concern.

The first step on this path focused upon *intercultural aspects* as the key concept that remained a consistent theme throughout the study's development. The next issue was how intercultural concepts could be conceptualised taking into account the study's target group, learners operating in a commercial business environment.

Considering this, *corporate educational* practice – in particular dialectical practice as discussed by Kemmis (2004) – presented itself as an important second point of reference not only due to the fact that the study is focused on a corporate technical leadership programme, but also because the concept of dialectical practice allows for the *political* aspects of the learning process to be fully considered.

The final key concept of *third/other space* - similar to practice - provided a second order approach in conceptualising how the intercultural learning operates. With much work already having been completed on this area by other researchers it also provided an ideal setting to explore the study's hunch, as to how learners operate in a space of their own.

Each of these concepts is discussed in more detail within later sections of this review. Before doing so, however, it was considered vital to review the literature on the broader cognate areas relevant to this topic.

Research in Cognate Areas Relevant to the Topic

There are a number of cognate areas that are relevant to the topic from which the key concepts (intercultural concepts, corporate educational practice, third/other space) emerged. These key concepts kept recurring and in some cases were directly related to two major theoretical perspectives – Post Colonialism and Globalization – which had now begun to drive this study.

Reading between the lines on third/other space and intercultural concepts within a comparative education and learner identity setting there was a definite relationship to Post Colonialism that stood out as an important cognate theme. Similarly, studies on corporate educational practice, knowledge economy/worker, and questions of identity suggested that the theme of globalization was an important aspect of this

study. These two cognate areas are drawn upon extensively in the research and are discussed below.

Post Colonialism

A number of scholars have examined the concepts of post-colonialism most competently. Edward Said (1978) with his work on *Orientalism*, Homi Bhabha (1994) through his work on *The Location of Culture*, Gayatri Spivak (1988) in her paper, *Can the Subaltern Speak?*. The misconceptions and mis-interpretations existing in the first world that post colonialism writings highlight, have a direct application to this research as the people and groups that the researcher works with have often been misunderstood or mis-conceived due to a form of organisational colonialism. An illustration of this is the attempt that is made by some training professionals unilaterally to modify courses for countries and/or ethnic groups. But in reality, and as an example, not all Asian cultures are the same, nor do all Spanish speaking countries have the same culture. Yet commonly organisational practice in some cases does not often comprehend this or appreciate its implications. There are many more examples that need to be explored, understood, discussed and portrayed. Post colonialism theory provides a comprehensive body of work to draw upon in order to demonstrate this need. This review will also look to the critics of post-colonialism such as Bernard Lewis (1982) and in doing so identify some possible flaws in the concept and its claims. Balancing and verifying claims on the positive and negative aspects of post-colonialism presents a challenge for the research but one worth taking. By drawing upon the previously mentioned perspectives of Said (1978), Bhabha (1994), and Spivak (1988) and their critics, such as Lewis (1982), not only assists in presenting material seeking to answer the research question, but also strengthens the underpinnings of the study's methodology.

Globalization

Over the last century many scholars (Marx, 1848; Dewey, 1927; McLuhan, 1960; Maglen & Shah , 1999; Amin, 2002; Murdoch ,1998; and Prusak, 2001) have discussed the phenomenon of globalization and its consequences. The concept of globalization today, has at least as many definitions as the number of disciplines within in which it sits. Globalization is very significant to this particular research as it

cuts across several aspects of the study, which influence and impact upon the transport and logistics sector, corporate educational practice, intercultural competence, learning spaces and several other elements related to the research.

In specific examples related to the research there is a globalizing expectation, on the part of the corporation, that worker competency will be flexible and adaptable to continual change and be able to meet the ongoing requirements of the global environment. This in turn is helping to perpetuate a new ontology of place and space relations through newer phenomena such as “*Actor-Network Theory*” (ANT) as described by Bruno Latour (2005). The ANT concept is another compelling idea for the research as it views the organisation as an arena where actors (workers, participants, stakeholders) meet, interact and influence each other thus forming a constellation of relational networks. Considering how the ANT thread for this particular research originated from the broader field of globalization it is imperative to consider globalization as it could draw out further new ontologies that need to be identified, explored, understood and demonstrated for this research and newer forms of practice.

Clough and Nutbrown (2002) highlight the importance of recognising topics that are “*too hot*” for research to cover and in regards to globalization and this particular research there are several cases such as Naomi Klein’s, *No Logo* (2000) and *Fences and Windows* (2002), which highlight wider issues of global worker competence and recompense. One need only consider the potential issue occurring where golf shoes made by workers earning fifty cents an hour at some *sweatshop* are to be worn by the golf player who makes fifty million dollars a year. Though issues such as this were wider than what this research was aiming to cover, the study draws direct links to anti-globalization arguments as a counter-balance to globalization and to demonstrate how the standardisation of knowledge within corporate educational practice not only possibly perpetuates inequalities encouraged by globalization but also nullifies worker identity and creativity. As the research progresses it will be vitally important to identify and balance aspects of the globalization debate to ensure that any consequence or outcome of the research – that may later be implemented in practice

– are thoroughly scrutinised in terms of direct effect and any indirect and after effects on identity and creativity.

It is important to stress that the researcher's methodology for this particular research (which will be discussed in more depth in a later chapter) draws upon the above concepts and perspectives through a process of balancing argument and counter-argument. This approach is one that not only strengthens the research methodology but potentially the research outcomes.

The Literature Specific to the Topic

Having reviewed the broader cognate areas related to the study it is possible to return to the more relevant specific concepts. As previously mentioned the researcher through his limited investigation found no literature that was directly specific to the topic. The deconstructing of the topic, however, did reveal concepts which are highly relevant to the concerns of this research. There were three concepts (intercultural, corporate educational practice and third/other space) that consistently re-occurred in this review process.

Intercultural Concepts

Intercultural concepts have been researched, developed and used by many scholars and educational practitioners such as Hall (1959), Gudykunst (1983) and Schwartz and Bardi (2001). This study will specifically take up Geert Hofstede's (2005) "*cultural dimensions*" model. The compelling reason for using the Hofstede model, with this particular research, is that it focuses specifically on work values and allows the study to build a case that covers several levels which include: industry culture; the specific organisation, global, regional, and local corporate cultures; workplace culture; occupational level and role cultures; and national cultures.

By using Hofstede's five cultural dimensions (power distance, individualism / collectivism, masculinity / femininity, uncertainty avoidance, and long-term orientation) the research will be better able to identify, analyse and understand intercultural concepts as potential influential phenomena. The Hofstede model also provides a general conceptual framework for analysis which can be applied to many

everyday intercultural encounters. Particularly useful it reduces the complexities of culture and its interactions into five relatively easily understood cultural dimensions that professional, academic and workplace audiences can comprehend. These five dimensions will allow the researcher to examine a corporate programme from the perspective of cultural values. This can be done as part of a content analysis in relation to course and module items such as key concepts, relationships, networks, ideas and themes. By coding these items using Hofstede's model the researcher will not only be able to map the cultural typography of the module and course but also apply a measure to gauge the degree of cultural design.

The research will use Hofstede's model whilst also drawing on other examples of intercultural field studies that include Harris and Zadro (2004) with their models of intercultural competence; Khoo (1994) with her work on intercultural conflict; Chen (2002) and her work on intercultural communication; Yoshikawa's (1987) "*double swing model*" that conceptualised how individuals, cultures, and intercultural concepts could constructively converge; and Ziegahn's (1998) work focused on transforming intercultural perspectives through online reflections.

Ensuring that the research methodology is durable, as Clough and Nutbrown (2002) explain, requires the employment of critiques of intercultural aspects such as that provided by Ma (2003) who identifies models and concepts, such as humans being wholly unalike based on language and location and hence holding no common aspects.

Corporate Education

(Specifically as related to dialectical practice (Kemmis 2004)). The field of corporate education is wide. However, as the research is specifically focussed upon practice this narrows and limits discussion to a more manageable debate. Recent scholars such as Rhodes and Scheeres (2003), Beckett and Hager (2002) and Clegg (1999) have analysed and discussed practice in the corporate domain, highlighting it as a field that is under constant examination. There is again a compelling need to focus upon practice primarily due to the fact that this research is concerned with the current dichotomous practice widespread in corporate education, which is not adequate or suitable to the organisation's needs, the learner's needs or many educator's needs.

Kemmis' (2004) discussion on dialectical practice is useful here as it allows for the dimensions of the individual, the social, the objective and the subjective to be seen not as dichotomies but in terms of the mutuality and relationship between each.

Employing dialectical practice also builds upon the methodology in that it sees the research as being political, by way of transforming the current (cultural, economic and political) situation through collaborative action and research. The researcher's personal experience as a practising corporate educator of over twenty years in the field also mandated the need to include practice as a part of the study. There is a wealth of experience and numerous personal concepts and ideas that the researcher can draw upon from the corporations and industries he has worked in, which include Resource and Energy Industry, Banking and Finance Industry, Insurance Industry, and the Transportation and Logistics Industry. Considering this, corporate education as a practice is a key concept area where personal history and experience is crucial to contextualise and position the research through - as Clough and Nutbrown (2002, p198) term - "*the radical lookings, listenings and readings*" related to the topic.

Third/Other Space

Theorised by scholars such as Bhabha (1994), Soja (1996), Reeves and Forde (2004) and others, this concept though relatively new has been well reviewed. It was through these and other readings that the third/other space presented itself as the most compelling concept related to the location of the research where the cross-road of organisational, cultural, national, industrial, educator/practitioner and learner identity meet. The notion of *space* provides the perfect conceptual venue for where the research is located. It is not situated within the first *official space* which is dominated by corporation, nor within the second *unofficial space* where the individual worker's local knowledge and experience exists. Instead third/other space is where both these first and second spaces overlap in an environment where neither is dominant and where other factors and perspectives are sought for exploration and innovation in a continuously moving forum of ideas, concepts and discovery.

A key outcome - resulting from employing the third/other space - is the achievement of a greater level of impact, performance, meaning and ownership, which is why it is

an integral key concept in this research. Such results can be seen in the works of third/other space practitioners such as Muller (2003) through *Human Computer Interactions*, Carrillo (2004) through the *Migrant Education Technology Program*, English (2005) through her work on *Women Educating for Justice in the Global South*, and Solomon, Boud and Rooney (2004) and their work *Space Invaders: troubling learning spaces at work*.

The researcher recognised the importance of space initially through the works of Solomon, Boud and Rooney (2004) and their work *Space Invaders: troubling learning spaces at work*. This particular material provided the researcher with the idea that space, is not always necessarily situated in an educational environment but can also occur as Solomon, Boud and Rooney call it “*in-between*” such as in the lunch room, at the photocopier, around the water cooler or literally any location where people gather at work whether it be onsite or offsite. It is within these spaces that the day-to-day organisational hierarchies are less visible as it is not just the space that becomes *in-between* but the people as well. Therefore, with titles lifted and people being less inhibited it becomes the space where people often discuss issues and where lots of problem solving takes place. The researcher also gained greater insight into the idea of space as Solomon, Boud and Rooney’s work also highlighted the issues that formalising these *in-between* spaces by corporations trying to recreate or engineer such a situation can also impede the more organic positive flow that the natural situation would normally provide.

There is more that can be stated in regards to the concept of space such as the previously mentioned works of English (2005), Carillo (2004) and others. The consistency resonating across all of these authors from the researcher’s perspective is that they demonstrate that space such as the third/other space discussed within this study provides an enhanced location for learning to occur.

Observing Clough and Nutbrown’s (2002) advice, the research also considered third/other space critiques such as Phillips (1998) *Lost in Space* and Parry’s (1994) *Signs of Our Times*, which provide counter-arguments to Bhabha’s third/other space concept.

With an understanding of the previous section's cognate areas related to the topic and now this section which covered the key concepts as well, it is possible to review the available literature from a more critical perspective to delineate what is of greater relevance for the study and also what lessons can be learnt.

Critique of the Available Literature

The literature reviewed may not be specifically related to the researcher's topic. However, by considering the topic more widely and by breaking the area of concern down into a number of key concepts, it has been possible to identify those aspects of the general literature of greater significance to the study. Therefore, the following critique comes from a partial view and a perspective, which in no way seeks to denigrate or refute the available literature, but merely to provide a commentary from the point of view of a single practitioner and researcher.

The researcher's first reflection on the available literature was that there seems to be little to no material that is directly and specifically related to the research topic. Considering that the transport and logistics sector is such a long standing industry and one that is currently expanding rapidly, to be unable to locate existing literature on the topic is reflective of the industry's need of attention to such an important aspect of training and development. This need of attention is even more interesting when it is considered that the industry is cross cultural by virtue of its very nature. With little to no literature, in terms of the impacts that various cultures have made on the area of the study, is possibly a comment on the industry's need to react to its stakeholders and to learn from its experience. Similarly with little to no literature on corporate technical leadership within the industry (which is different to the usual generic Management and Leadership field) raises again the question of the perceived importance of the topic within the industry. This need for literature directly related to the researcher's topic made the following review of concepts and theoretical perspectives seem somewhat of a second level priority, however, it was an exercise which provided a great deal of information as to what contributions the current study could make to the field in helping it to move forward.

Post- Colonialism

Reviewing the topic from the theoretical perspective of Post Colonialism, there is much that can be learnt from the work of Edward Said (1978). His work on *Orientalism* is of value to the study in arguing that there is an ongoing tendency for western multi-national corporations to group other cultures as a whole and then deal with them in a single stereotypical approach. The critique of this approach is that Said is similarly grouping western societies as a whole and the researcher's own study is similarly grouping western and multinational corporations as a whole, both in a stereo-typical way which is equally ironic.

There are lessons to be learnt as well from Said in that his discussion of post-colonialism is a portrait of a western approach dominating and colonizing the east, but it also works in reverse and is a phenomenon not limited to west and east, as it occurs in societies and corporations. Similarly in reviewing Bhabha's (1994) work there are parallel ideas between his work and this study in how third world countries are defined in a way that labels them as being subordinate. Similarly some multinational corporations define worker/learners as a subordinate homogenous innate group that require leading and managing from a top down approach. The critique of Bhabha's work, however, does not lie in this area for the researcher but more-so in the idea that culture is created within the location where these two: the *colonizer* and the *colonized* clash. The researcher is in full agreement that there is definitely a culture created from this clash, which is portrayed further in the third/other space section, however, he does not agree with Bhabha in that the *colonizer* having seen *mimicry* occur with the *colonized* realises that a greater good can be attained through a fusion between both parties. Historically, the *fusion* has been more realistically the *colonizer* seeing more of an *adoption* and taking on the view that the only way forward is one, pre-determined by themselves over the *colonized*. This approach is certainly more true in the case of some multinational corporations, which espouse a unilateral universal vision, mission and mandated educational approach that all its 'minions' must adhere to without exception.

A final comment on the literature available in regards to Post Colonialism is that the researcher finds himself in agreement with some of the critiques of Bhabha

(1994) and others, which points out that the language and jargon used by these acknowledged scholars is somewhat complex and daunting. This comment was found to be accurate by researchers (like this study's author) who are also day-to-day practitioners.

Globalization

Providing a critique of the available literature regarding the theoretical perspective of globalization is an easier task in that the literature is more accessible in terms of *plain speak*. However, a critique on globalization is much harder in regards to the quantity of material available as there are an abundance of views pushing this topic into the too hard or as Clough and Nutbrown (2002) call it the “*too hot*” basket for the researcher to cover. So whilst there seems to be equally valid arguments on both sides stating the advantages and disadvantages of globalization from many disciplines, the first critique in terms of this study is that there is still little to no real discourse on globalization from the corporate educational perspective. Related areas of discourse dealing with worker competency, however, provide a topical forum in which authors, such as Klein (2000) discuss the exploitation of the global worker; a theme that steps beyond the boundaries of this study but is in synch with the idea of workers being colonized in the workplace.

The researcher's main review of the anti-globalization movement in terms of corporate education is that the field they should be addressing are those similar to that identified by George Ritzer (1993) in his work *The McDonaldization of Society*, and how individual identity is being numbed at the core with corporatization sameness. The capacity of the anti-globalization movement to make greater headway results from an increased understanding of the core of the organisational doctrine, which is at the centre of worker education. Unfortunately, this seems to be something that has not been further investigated by the anti-globalization movement in their quest for change. The researcher highlights the progress that could be made with a realisation of the difference that this can make.

The other review of the anti-globalization movement is the greater potential not yet fully seized by educators to co-ordinate and to progress as a single unit with

common goals and purpose. Possibly inhibitors to this could be the arguments over basics and fundamentals which may be impeding such opportunities. Suffice to say that the globalization argument has its own credible milestones such as improvements in health for many third world countries and increases in education and rights for women, children and minorities which is difficult to argue against and possibly calls for a more balanced view between the pro and anti globalization movements towards a greater common good.

Having worked through a critique of the available literature on the cognate areas relevant to the topic, it is important to drill down further into the key concepts of the topic which not only provided more relevant literature to review but also greater clarity on the topic's significance.

Intercultural Concepts

Those who discuss the importance of intercultural concepts such as previously discussed; Hall (1959); Gudykunst (1983); Schwartz and Bardi (2001); and Hofstede's (2005) share a common view that ignoring the factors (or at least not having an appreciation) of the many facets that span intercultural concepts is a sure recipe for failure when working across cultures. This may not always occur though highlighting the need for practitioners to be cautious when using intercultural concepts. It is worth noting Ma (2003), who identified what the researcher also found in that people are not necessarily similarly based on language and location. Simply put this means, just because people are from a similar culture or background does not infer an inherent commonality, therefore, making some so called intercultural concepts irrelevant in certain situations. The researcher uses a very basic scenario to demonstrate this irrelevance. As a practitioner he was teaching the use of a technological computing piece of equipment (scanner) to participants (who were the country trainers from across Europe) whose first language was not English. As the researcher taught he was able to say a word such as "*press*" and along with the accompanying actions show the participants who in turn began using the word "*press*". Then similarly they also started using similar words such as "*enter*", "*reboot*", "*switch*" and more.

Therefore, as a practitioner, the researcher faced with the challenge of ensuring students are competent to launch a system in their country, somehow gets the message through with little adherence to the so-called “*correct*” rhetoric of intercultural concepts. In no way is the researcher advocating that the training delivered was ideal. However, at the end of the day the system was rolled out, launched by all and was successful by all accounts.

As a practitioner looking for improvement, the researcher believes in the need for greater awareness on areas of intercultural concepts. However, in this case it was not necessary for success (particularly in regards to computer technical training) in fields where universal elements such as numbers or computing facilitate the learning and dominate the practice.

Corporate Education

Corporate education specifically related to dialectical practice is seen by Kemmis (2010) to be in need of a greater array of perspectives as it holds different meanings for different stakeholders and practitioners. Under the title *What is Professional Practice*, Kemmis (2010) argues for a greater understanding of practice and a widening of the meaning. In terms of a research perspective this has huge value and credibility. It also raises the question; “*Is everyone a practitioner?*” However, from a practitioner’s perspective this creates a degree of unnecessary simplicity and to some degree a *watering down* of what the researcher (as a practicing professional) considers to be an occupation that requires a degree of preparation, parameters and definition. The need to settle on a definition of practitioner for those practising is crucial to ensure that organisations, at least those within the corporate sector, do not believe that the practice of education is one that can be done by anyone.

As a practitioner of some twenty years standing the researcher has long been arguing for a sound definition of practice so as to ensure that practice is seen as legitimate from a technical perspective and appreciated by all as such. Kemmis (2010) has in the researcher’s view more recently over-complicated the meaning of ‘practice’ through the employment of too many perspectives (by including variables such as; A- Meaning and purpose, B- Structured, C- Situated, D- Temporally-

located, E- Systemic, F- Reflexivity and transformation, G- Forms of reasoning and more) which go beyond the initial five he proposed in 2004. This more recent approach again portrays a field of study that from a researcher's perspective is constantly moving forward trying to develop and improve practice. Unfortunately, from a practitioner's perspective it again demonstrates a potentially confused 'shopfront' that organisations such as the corporate world have little time or patience to digest as they seek a stable definition to demonstrate the validity of practice and to move forward for the benefit of all stakeholders.

Third/Other Space

Third/Other space as a definition is rapidly becoming ambiguous. At the outset of the researcher's research it was generally referred to as the space where learner and educator collaborated equally as discussed by Brooke, R., Coyle, D., and Walden, A. (2005). Today third/other space covers an array of meanings such as, but not limited to: usage of technology in a third realm of learning such as Muller (2003) and Soukup (2006); working and learning in a different time and location such as Oldenburg (1989); incorporation of a third person to the historical teacher student relationship such as a model student as described in social learning theory by Bandura (1977); application of practice in a space beyond educator and learner mode or common backdrop but into a new context such as a 3rd dimension like a community programme or that discussed by Whitchurch (2008) and much more. Considering the increasing ambiguity of the term third/other space in educational practice, there is a need to tighten up or possibly even reword the term to minimise any confusion as the concept develops.

Returning to the definition of third/other space established for this study there remains the critical question of how real can the third space be, considering that both teacher and student identity and spaces have already been contaminated through historical interaction and precedence. Take for example a student from a second generation minority group or diaspora and the question of identity arises as to how much they have maintained from their original family homeland compared to the identity they have developed based on the assimilation as a second generation patriot of their new country environment. Therefore, the question of whether

third/other space has any legitimacy at all is based on the fact that each individual has varying degrees of identity and an infinite number of unique originating spaces, which may mean the task of understanding third/other space is more agonistic (as in an agony to understand) than antagonistic towards improving practice.

Another issue with third/other space is the impact that elements such as time, location and more have upon all spaces. Space considered in isolation is, as Henri Lefebvre (1974) calls it “*an empty abstraction*”. Here again, we need to consider the plethora of issues that come about when we begin translating space in terms of time, location and other impacting related elements. This again makes third/other space a good topic for researchers to investigate further but leaves practitioners with a paradoxical dilemma of finding time to consider *time in space* from a learner and/or practitioner view.

In reviewing and critiquing the available literature it becomes clear that there is a disparate perspective between that of the researchers who are looking for greater understanding and meaning to improve education through continuous questioning and broadening of meaning and theory compared to the practitioners who are looking to improve their own practice through a reflective process that hopefully will lead to a more simple and clear specification of what works and why. The overall question is where and when do these two perspectives come together considering the perpetual push that often occurs from some organisations in the need for performance over analysis. It is hoped that this study will go some way to providing at least a step further between the two perspectives laying out a potential third/other space for both researcher and practitioner to consider moving forward together.

Summary of What is Known about the Topic

The researcher conducted a range of searches, investigations and enquiries in to the specific topic of his study. This search included discussions with trainers, educators, staff and managers along with visits to their various global locations. This search for more knowledge on the topic covered sites across Asia, Europe, Australasia, the Pacific Islands and discussions with representatives from the Americas. The search also included reviewing texts and documents from libraries

and other repositories around the globe as well as scouring the internet for any online materials on what is known about the topic. Although the *hunger* to find something related to the topic by the researcher was almost *ravenous* as he sought literature in any format, the search was still limited as it was the work of a single person and hence found little to no body of literature upon the study's specific area of research within the education practices of the logistics and transport industry. Considering this, the researcher is delving into an area where it is hoped that this study can make a contribution to the field of knowledge. This is discussed in more depth within the next section of this chapter.

The Contribution that this study will make to the Literature

This research area is a new field that is mostly unchartered within corporate education/training as this thesis is based on a case study within the Transport and Logistics industry. This does not mean that because of the specificity of its context, it sits out on its own in relation to the key references and theoretical perspectives. Quite the opposite is the case as the exciting opportunity that the research purports to bring these key references and theoretical perspectives to bear on the Transport and Logistics industry. A visual representation that demonstrates how the research is situated amongst the existing literature (and conversely may also impact the existing literature) is through Diagram B Situating the Research (diagram included on the coming pages), which is discussed below through each of the diagram symbols.

The World Class Transport and Logistics symbol

The research is placed within one of the fastest growing fields of the global economy and the pressures this places upon the research (particularly for new flexible solutions that keep up with the rapid pace of change) and corporate education creates potentially both a positive and negative force for the study. Similarly the industry is a key stakeholder that needs to continually be referred to as the study progresses to ensure significance and relevance.

The Organisation symbol

The organisation represents a sub-system of the Transport and Logistics industry. With the research placed in this context it not only inherits the above industry

comments but also sets itself within a specific organisational framework adopting all the associated elements that comes with this particular organisational subsystem such as a dependence on empirical data (per the graphs and charts within the diagram), the drive towards the bottom line (per the Yen, Euro and Dollar signs within the diagram) and the position and place of educational standardised practice through pressure for corporate universities (per the graduate cap within the diagram).

The Globalization symbol

Globalization in light of this particular research fits across several areas of the study influencing and impacting the transport and logistics field, corporate educational practice, intercultural competence, learning spaces and several other elements related to the research.

Colonialism and Post Colonialism symbols

The research fits across both of these perspectives as it identifies the increasing corporate colonialism and the pressures this is placing on workers/learners whilst also recognising the growth of the post colonial worker/learner who has an increasing awareness of their identity and how it is diminishing in terms of its own heritage and culture as corporations dictate a new identity.

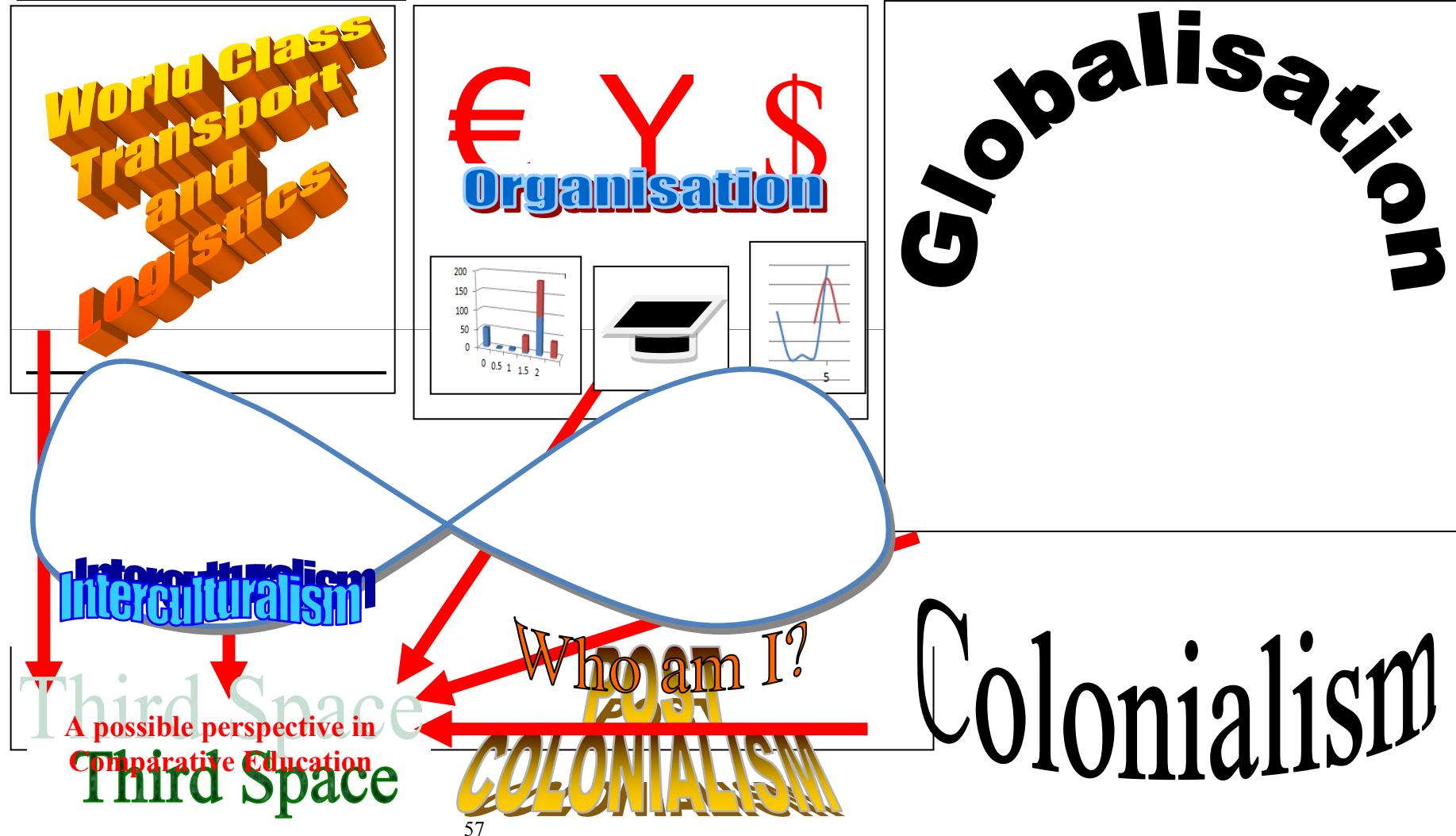
The Infinite Interculturalism symbol

The research is located closely within this symbol - as taken from Yoshikawa's (1987) "*double-swing model*" – because it conceptualizes how individuals, cultures and intercultural concepts can meet in a constructive manner allowing for both unity and uniqueness.

Third Space

The research fits across third space in terms that this may be the location that the study moves towards as a possible perspective. It is by no means an end to the study and research but a point which is identified as the milestone where this research may draw its findings and results from for further research to later progress. It is from this position that the researcher hopes that this study will make its most meaningful contribution for future practitioners to draw from for their own practice.

Diagram B - Situating the Research



Chapter Summary

The aim of this chapter has been to situate the research in the form of the physical tangible location within which it has been undertaken and also the intangible theoretical context across which it sits through a critical literature review.

In regards to the physical location of the study the researcher discussed the role that each of the stakeholders play and similarly the way these roles interact with each other. This sets the basis for understanding how these stakeholders will be portrayed along with their roles and responsibilities within the coming chapters. The researcher also discussed how the stakeholders play a critical role across the study as they each have the power to impact and create change as practitioners. With the stakeholders defined in terms of what they currently *do* and what they potentially *can do*, the organisational canvas upon which these stakeholders sit was then depicted using a diagram. It was through the diagram and accompanying discussion that the stakeholders and organisation background to the study were explained. It was also through this depiction that a comprehension of the study's location could then be seen and the setting of the research question finally situated.

In regards to situating the background of the study in a theoretical context it was not possible to review all the literature that is related to the topic (as this would be practically impossible) but to at least comment on the literature that has had the most impact of that which the researcher has reviewed. There is an abundance of further literature and findings that may be related to the researcher's area of study which have as yet to be uncovered or discussed. However, it is equally true that the researcher is limited in terms of resources and as previously explained conducted as comprehensive a study of related literature that can physically be accomplished by one person. The researcher does not claim this literature review is exhaustive or absolute as it is clear from the study to date there are many views, opinions and perspectives. What is hopefully gained from this literature review is a perspective from a single practitioner/researcher stating a view so as to explain his hunch and hope to improve practice for corporate trainers via his research study.

3 – METHODOLOGY

Objective of this Chapter

This chapter sets out to provide a clear view of the methodological approach – including problems and complexities – that was taken for this study. It provides a general definition and overview of the approach and why that approach was considered to be the most appropriate.

The chapter also provides a basic outline of the data collection process, which was adopted, in order to try and ensure later *buy-in* and adoption by others of the study's findings. The purpose is to provide the reader with answers to such basic questions regarding the method's framework of *What was done?*, *How was it done?*, *Who was it done to?* and *Why was it done that way?* in relation to the study. In stating this, the study again hopes to provide a guide and template for practitioners to follow in order to replicate the study in their own practice.

Throughout the chapter, context is regularly provided so that the reader understands the logic of the researcher's decision-making on the abovementioned *what, how, who and why* questions. This context is provided in a reflective manner that seeks to address *situated-ness* and *reflexivity*. Through this reflection it is hoped the reader will be able to better locate the researcher within the research.

Finally, it is believed that by the end of this chapter the reader will not only have a clear understanding of the *what, how, who, why, where and when* of the methodology adopted but will also understand how the approach taken has attempted to build a level of robustness and durability into the study, thereby again providing a useful template, which practitioners can extrapolate and use for their own work.

Research Methodology

The research methodology adopted is a case study approach using a mixed mode method encompassing content analysis for the course module content and an Insider/Outsider perspective – using interviews, discussions and observations with the course module trainers and participants – within a comparative study

framework. The systematic layered application taken with the methodology for the study is a grounded scientific approach that will be discussed later within the Procedures section of this chapter. To make a daring and bold claim, the adoption of this approach and methodology is synchronous and congruent with the study's hunch, which is that the findings will show that collaborative and dialectical designs provide for greater learning and benefits for learners, practitioners and other stakeholders involved in the process.

The study is a simple process designed so as others can use it as a guideline for their own research by either copying and/or extrapolating required components. There is a depth to the methodology, which involves a lot more theoretical details – particularly useful for the scholars and those practitioners interested in the theoretical aspects of the study or as is increasingly the case for those practitioners who need to convince their corporations that their findings are grounded in a sound scientific process – this is discussed in more detail in the ensuing chapters.

Case Study

It is important to provide a basis for understanding case study method, which is why the researcher provides this definition:

A case study is an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.

(Yin, 2003, pp. 240)

It was through Yin (2003) that the researcher gained greater insights into not only what steps comprised the development of a case study but also what a case study meant in relation to his research. The researcher views his study as a proposition (hunch) which may translate to a generalised theory that is not specific or particular. This is where Yin and his work is in synch with the idea of the researcher's proposition (hunch) as Yin explains:

The short answer is that case studies, like experiments, are generalizable to theoretical propositions and not to populations or universes. In this sense, the case study, like the experiment, does not represent a "sample," and in doing a case study, your goal will be to expand and generalize theories (analytic generalization) and not to enumerate frequencies (statistical generalization). Or, as three notable social scientists describe in their single case study done years ago, the goal is to do a "generalizing" and not a "particularizing" analysis (Upset, Trow, & Coleman, 1956, pp. 419-420)
(Yin, 2003, pp 15)

It is this point that highlights the main reason why the researcher chose to adopt a case study approach.

Case studies require a particular case to analyse and study. In this instance the course chosen for this case study is a current one within the Transport and Logistics field and focuses on technical leadership within an operational branch location. The course was used within an organisation throughout Europe and was also previously used throughout the Asia Pacific region from where it originated. The course is a content rich in-house programme spanning five days and encompasses several modules covering topics such as technical operations, teamwork, leadership, and related corporate and commercial competencies. It is from these modules that a basic operations module was selected upon which the research was conducted.

The case study approach was adopted because it was clear that this would allow the researcher to concentrate on a smaller more manageable unit of work, which in this case is a specific module that is studied and explored over time and space. In this case the time period spanned across a year through face to face workshops, conference calls and telephone workshops. The case study is also an example of purposeful sampling. It has been specifically chosen because it is a module within a course that was taught across a corporation.

Participants

The participants consisted of two groups with the first being two male regional trainers and the second consisting of over thirty five country trainers with a mix of approximately 60% male and 40% female. The regional trainers were tasked with learning the course initially, making changes and then training the country trainers. Each of these groups is discussed in more detail below.

The regional trainer participants were the Spanish and English-speaking regional personnel. At different stages they were both participants (when learning the module) and practitioners (when later teaching the module as regional trainers) for the course. This group also had the greatest impact not only on subsequent learners but also on the organisation of how the content was interpreted and taught. This group consisted of trainers who were well versed with the training course having previously used parts or all of it to train other trainers within their respective countries previously. Therefore, these regional trainers knew the course content, its application in the workplace along with all its pitfalls, nuances and the effects that these may have on participants implementing the knowledge and skills back into the wider workplace. These regional trainers were mature men in their mid 40s, who had lived experience of the issues and behaviours that the course was designed to correct and improve. Their selection was also predicated on their ability to articulate their experiences and those of others (trainees) covering not only those explicit content themes and issues from the course and trainees but also those more implicit themes and issues, which may be missed by a less experienced practitioner.

The ethnicity of the regional trainers was an obvious fit (with one being Spanish and the other having an English speaking background) which matched the study's focus of a comparative framework. The education level of the participants was also an important aspect as they both needed to have fluency in their first language as well as fluency in English so as to be able to translate from the original content. In both cases this was not a problem. It should also be noted that these regional trainers in terms of their life experience, maturity, workplace knowledge and professionalism cannot be under-rated as these were crucial factors in terms of the

selection of these participants as both parties excelled in all of these criteria. The other key area considered was the ability of the regional trainers to sufficiently understand the variables of the case being studied and not to confuse the findings. This again was achieved by selecting regional trainers who could see the picture at an individual, group, location, country and regional level. It is at these other levels where these trainers were charged with training another group of participants who were the country trainers.

The country trainers are the other integral group of participants who are also involved in the study. The country trainers are the participants who are tasked with rolling out the training in their respective countries. The country trainers receive training from the previously mentioned regional trainers and must then tweak the programme (as required) before travelling across their respective countries to train staff at the *coalface* of the business. It is these country trainers who ultimately make or break the course and module as, firstly, it is their approach and style in redeveloping the module to suit their country and then, secondly, in training it, which cannot be under-estimated in the programmes eventual use, application, performance and success. In regards to this study the Spanish-speaking participants extended to ten country trainers whilst the English-speaking participants extended to twenty five country trainers. Both groups were split in terms of gender with approximately 40% being women and 60% being men.

Whilst the English speaking country trainer group did not fully comprise of people for whom English was their mother-tongue, it is important to note that many country trainers were either expatriates (who spoke another language other than English) from English speaking countries and/or had been educated within English-speaking schools and were thus fluent in English, hence their inclusion in this group. It should also be noted that not all the country trainers within the English speaking group would roll-out the training in English, however, there was a substantial group to cover England, Scotland, Wales, Northern Ireland, Ireland as well as some countries where training was preferred in an English format such as some locations in the Nordics, Switzerland and more. Therefore, considering

all of the above and to avoid any direct identification of individuals, specific English speaking country trainers have been grouped with the other country trainers where the course may not be fully rolled out in an English format. This does not dilute or diminish the specific English speaking country trainers input as during the train the trainer process where observations and feedback was attained from all countries as part of normal business practice, the notes from those specific countries where the course is rolled out in an English format were distinctively highlighted and identified for the study. With this distinction made and an understanding of the type of input that was gathered from each group of country trainers the study will continue to identify the two country trainer groups as English speaking and Spanish speaking to avoid any specific identification and also because this is how the train the trainer process for a programme was often rolled out as per normal business practice.

With a regional trainer being Spanish and hence fluent in the language it becomes clear that the ability to deliver the module directly to a Spanish-speaking group in their own language enhanced the learning. This also answers the question as to why you would run the module in a train the trainer format in both Spanish and in English. Such actions again demonstrate the maturity of the regional trainers to *go the extra mile* in making as big an impact with training where and when they could and ensure that where they could they made service at an individual country level (in this case partly training in Spanish) avoiding a one size fits all standard.

Finally to tie this all together the Spanish regional trainer training the Spanish country trainers was directly the Insider – in the Insider/Outsider approach – whilst the English-speaking trainer acted as the Outsider. (The course in this instance was partly trained in English so as to allow the Outsider to observe and record country trainer discussion and responses.) Then when the English-speaking regional trainer trains the English-speaking country trainers he was directly the Insider – in the Insider/Outsider approach – whilst the Spanish-speaking trainer acted as the Outsider.

Data

The initial data was collected through the process of content analysis. Content analysis was selected as it provided a qualitative approach for the research. Denzin and Lincoln (1994) provides a definition that closely relates to the researcher's aims:

Qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring to them. (Denzin and Lincoln, 1994, pp 1-17).

Qualitative research permitted the interpretation of the content through the case study approach as previously discussed which the researcher selected but also provided further interpretations through other aspects of the qualitative approach such as those discussed by Pope (2006):

Qualitative research encompasses a range of philosophies, research designs and specific techniques including in-depth qualitative interviews; participant and non-participant observation; focus groups; document analyses; and a number of other methods of data collection.

(Pope, 2006,p1).

As can be seen interviews, discussions and observations are all key aspects of qualitative research and were similarly critical to the researchers approach as they will also be further discussed later in this chapter. Moving forward it is important to note the qualitative research approach taken by the researcher allowed these elements (of case study, content analysis, interviews and discussions and observations) to adequately interweave and support each other throughout the study.

With a better comprehension of the researcher's intent in adopting a qualitative research approach it is timely to discuss the more elaborate elements of the research beginning with content analysis.

Content analysis was always listed for consideration as a research approach as it provided the means to analyse existing content using a structured qualitative approach. The General Accounting Office of the US (GAO) (1996) provide a sound definition of content analysis:

...it is a systematic, research method for analyzing textual information in a standardized way that allows evaluators to make inferences about that information. (Weber, 1990, pp. 9-12, and Krippendorff, 1980, pp. 21-27)
(General Accounting Office of the US website, 1996, pp.8)

The purpose of content analysis have been identified by Holsti (1968) as:

- *To describe trends in communication content;*
- *To relate known characteristics of sources to message they produce;*
- *To audit communication content against standards;*
- *To analyse techniques of persuasion;*
- *To analyse style;*
- *To relate known attributes of the audience to messages produced for them;*
- *To describe patterns of communication.*

(Holsti, 1968, pp596-692)

Without going into each element above, the researcher's choice of content analysis was purposefully based on these elements, as for instance the need to analyse persuasion through the module content was of importance to the study.

Content analysis was also highly considered by the researcher as the potential for coding data and then utilising this for further analysis such as frequency, relationships and more was ideal for reviewing training modules. Again this is well explained through GAO:

The classification process, called “coding,” consists of marking text passages with short alphanumeric codes. This creates “categorical variables” that represent the original, verbal information and that can then be analyzed by standard statistical methods. The text passages can come from structured interviews, focus group discussions, case studies, open-ended questions on survey instruments, work papers, agency documents, and previous evaluations.

(General Accounting Office of the US, 1996, pp.8)

Content analysis was also ideal for this research study as it was cost effective only involving the researcher's energy and time which was his own to give. This was a side-benefit at a time where costs and resources were low during the post 2008 global financial crisis.

Considering this the content analysis process provided a detailed description of the case whilst identified themes and issues were analysed to develop interpretations about the case for possible changes suggested by the study's findings. The data collected came not only from an analysis of documents, audio-visual material, artefacts, and archival records, but also from observations, interviews and discussions.

Materials

The course itself used many different types of materials such as exams, powerpoints, workbooks, workshop group/team studies, individual case studies and more. It was important to describe these, which is done in more depth later within this chapter. Similarly, the examination and analysis of these materials

through content analysis and by way of the Insider/Outsider process is discussed in more depth later within this chapter.

Procedure

The procedures taken to complete the process included the steps of selecting the Course; Reviewing the Course Content and Organisation of the Modules; Selecting a Course Module; and Applying the method of Content Analysis and Observations, Interviews and Discussions using the Insider/Outsider approach.

Within the context of Insider/Outsider, interviews, discussions and observations were selected to do this because they provided a tangible means of knowledge production between humans (which content analysis did not provide) that allowed for a second level of research review and analysis to accompany the first level content analysis.

Interviews and discussions provided the researcher with three key elements for his study. The first of these was as a means for gathering information which had direct influence on the researcher's objective, or as Tuckman (1972) puts it:

By providing access to what is inside a person's head, it makes it possible to measure what a person knows (knowledge or information), what a person likes or dislikes (values and preferences), and what a person thinks (attitudes and beliefs). (Tuckman, 1972, p268)

The second reason why interviews and discussions were employed was that they allowed the researcher to test hypotheses and suggest new ones. Through the Insider/Outsider process the researcher could not only seek feedback from people regarding his own hypotheses, but also identify any new hypotheses that were inadvertently identified by the participants themselves and or any newly developed hypotheses that manifested themselves through the interview and discussion process.

This may seem like a surreal scenario, however, it is through the interview and discussion process that new hypotheses are born and former held hypotheses are either proved, disproved and modified by participants. In short it was this process that provided the litmus test for all hypotheses.

Not least important the third reason why the interview and discussion process was employed by the researcher was that it allowed him to return to his content analysis and look deeper into this first level approach findings to either validate and or identify further knowledge and information for his research study. In essence it provided the *yin* to the content analysis *yan*.

Observations provided similar reasons to those of interviews and discussions except that through the Insider/Outsider approach they also provided the emic insider who directly interviewed and discussed matters with participants to the etic outsider who observed and watched proceedings. These two elements were then converged later as the emic interviewer and the etic observer discussed, analysed and cross-pollinated with each other on all issues involving the interview and discussion process.

With this basis for the procedure identified it is possible to progress to the more elaborate dealings on how they interact through the research process.

Content Analysis Stage 1 – Level 1 - Analysed the module to determine; key concepts (cultural and other); relationships; networks; themes; and any other relevant aspects. Content Analysis Stage 1 – Level 2 - Examined these findings more deeply by applying a content analysis lens which used Hofstede's (2005) five cultural dimensions of power distance; individualism/collectivism; masculinity/femininity; uncertainty avoidance; and long-term orientation. The next stage then was to conduct interviews/discussions and observations with the regional trainers and country trainers using an Insider/Outsider approach to process the data for further analysis.

Insider/Outsider Stage 1 Interviews, Discussions and Observations – Used the Content Analysis Stage 1 Findings to; Analyse interpretations; Cross-check as to the organisational intent; Review in light of national, local and other cultural perspectives; and Perform a collection of information on course relevance. This was then followed by applying the research methodology of content analysis again for further analysis.

Content Analysis Stage 2 – Level 1 - Data from Insider/Outsider stage 1 underwent further analysis, that is that the content analysis process was conducted a second time to clarify, confirm and tease out deeper meanings and themes that; Provide a more complete set of data and questions on programme concepts and their relationships; and Provide a basis for the final series of Insider/Outsider interview/discussions. Once these steps were completed there was a need to apply interview/discussions and observation methods using Insider/Outsider to process the data for further analysis with regional trainers and country trainers.

Insider/Outsider Stage 2 – Interviews, Discussions and Observation - This was a final review to check and clarify final meanings and review potential changes and improvements.

This systematic procedural approach ensured that the overall research methodology was self-correcting as the researcher moved from one mode to another and back again continually defining, questioning, redefining and checking. Further unpacking of these procedures is completed for practitioners within the Specific Procedures section of this chapter.

Ethical Considerations

The research process has been designed to ensure that ethical behaviour is well maintained through every stage of collecting, collating and organising participants, data and findings. This was done by obtaining informed participant consent and ensuring confidentiality first and foremost. It is also accomplished by ensuring that

there is no risk or harm that research participants or related groups could experience whilst participating in the research, as the information they provided was;

- Only known directly to the researcher;
- Never quoted or used in a way that could identify them, as only the researcher was exposed to the information and the researcher wrote notes in an anonymous generic method using a de-identification process;
- Presented by the researcher in a generic format that cannot identify or suggest any individual's particular participation. (The regional trainers consisted of two people of which consent forms from these participants were attained as both these people were directly interviewed. In regards to the country trainers, ten Spanish speaking participants and twenty five English speaking participants, the responses collected were always generic representing a group perspective so no notes on individuals were ever made as feedback attained was always through general discussion with data collected being as per normal business practice whilst the course module was being trained as part of the train the trainer process.); and
- Situated to have no direct or indirect link or line relationships between the participants and the researcher that could impact either party as they reported to different managers in different organisational structures within the corporate structure.

Limitations and Delimitations

There has already been some foreshadowing of the scope of the study. This now needs to be explored in regards to the delimitations and limitations of the study.

The initial plans for the study were very broad as it was intended to look at the full spectrum of transport and logistics training and to compare and contrast this in relation to Western and Eastern cultures to suggest improvements in the process for all involved in the training process. On reflection (and with an improved understanding of the research process) obviously this was a task that may have made great tabloid reading (possibly comical reading for researchers) but was

unrealistic and would not necessarily provide much worthwhile grounded theory with which practitioners could work to improve their practice.

Over some years of exploring research and the basis of various approaches, attending international conferences to watch, listen, learn and to discuss other researcher's work; constant reading and reviewing colleagues and other researcher's materials; and regular discussion with his advisor the researcher realised that his study required a tighter focus that would present real meaning to practitioners. In light of this the researcher reset and limited the parameters of his study to achieve a more modest but realistic outcome as described below:

In Terms of Content

- The Transport and Logistics field.
- A Management course within this field.
- A major module within this abovementioned course.

In Terms of Participants

Practitioners (two regional trainers) who would teach the course to other practitioners (country trainers) is the first level of dissemination in the train the trainer process, and within this group; an English-speaking regional trainer; and a Spanish speaking regional trainer.

Practitioners (thirty five country trainers) who were then charged with using the course to train staff across their countries is the second level education process, and within this group; an English-speaking group of country trainers; and a Spanish-speaking group of country trainers.

Whilst scholars and researchers may question the limitations of such a study in terms of sample size, this scenario is a common situation within corporate training with one to two trainers educating a class of over thirty five participants.

Therefore, for practitioners the scenario is a realistic and common practice,

providing real world relevance not only for this thesis but also as a guide for practitioners who may use the study as a template.

With the study focussed on the above, the research would not only be more specific but would provide findings that could be more detailed and possibly useful to other practitioners. As mentioned above this potential constrained set of parameters was also selected so as to provide a straight forward template for practitioners to use if they wished to similarly complete their own study and research on a particular course, module and group in order to identify possible improvements and make changes within their own work. This could thus provide a new and different type of self evaluation tool for the practitioner. A tool that focuses on those aspects of practice which are often seldom reviewed, and which relate to the participant's identity and the space within which they work and learn.

Because of the tight focus there is no doubt that the findings of this study could initially be seen as being too specific and therefore relevant only to those practitioners within the context of the course, module and participants as specified. Despite these limitations, there is a hope that the design of the study may transcend these and provide a way into new realms of understandings by providing perspectives for practitioners to study and to learn from their practice.

Specific Procedures

To clarify the term, *specific procedures* refers to those particular steps and activities that the researcher adopted for the particular area of study. In short, this section succinctly articulates the specific procedures used for addressing the research problem and discusses what actions the researcher used to collect data in order to answer the research question.

When considering this the researcher's belief in the credibility of mixed method lead him to look at traditional approaches possibly somewhat being constrained and unrealistic as too often the focus is upon a programmes objectives which are not tied to the learner but to a situation that is often artificially based and which has little consideration for variables such as learner identity, culture etc. This is in

synch with Parlett and Hamilton (1972). Therefore the researcher identified that the Parlett and Hamilton approach known as *Illuminative Evaluation* was a more realistic approach as it focussed on description and interpretation rather than on measurement and prediction. Illuminative evaluation as described by Parlett and Hamilton is:

Introduced as a total re-appraisal of the rationale and techniques of program evaluation.

(Parlett & Hamilton, 1972, p1)

The researcher from his study realises that any research of a programme needs to consider varying forces of identity, culture, organisation and more as parts of the elements that can enhance or hinder corporate education. This is in line with Parlett and Hamilton who state:

Illuminative evaluation recognises that an innovative instructional program cannot be separate from its learning milieu – a network of cultural, social, institutional and psychological forces.

(Parlett & Hamilton, 1972, p1)

It was only through delving deeper into the process of illuminative evaluation that the researcher identified the two key concepts it held, being instructional systems and learning milieu.

The first of these concepts, Instructional Systems, are the catalogues, prospectuses, reports and other items that comprise a formal strategy and statement that relates to the practitioner educational activities. In most cases the instructional system is modified in an unauthorised way to suit each individual student's needs, similarly the changes and movements of the course as it progresses also modifies thus altering the originally set instructional systems. Therefore the practitioner remains the only person using the original authorised format of the instructional system whilst for others and in real life the changes though unauthorised (as they are not officially recognised) do alter for various

reasons. Recognising this instructional system is important but understanding it's evolution is critical for illuminative and truer evaluation.

The second of these concepts is Learning Milieu which is the network of cultural, social, institutional and psychological variables that interact to create a unique pattern of circumstances, pressures, customs and more within a course and programme. This milieu is in line with the researcher's own study as his work acknowledges that real life is often overlooked as the mix and effect that various elements that come to a course from external sources is significant in the learning process and must be identified and analysed for future practitioners to learn and work with.

The greatest alignment between Parlett and Hamilton and the researcher's own work is their synchronous view that tracking and appreciating these two concepts of instructional systems and learning milieu highlight the need for recognising and interpreting various educational situations. To do this there are three stages to illuminative evaluation, which unknown to the researcher as he was working through his study, he was actually using. These three stages to illuminative evaluation (which are identical to the researcher's own procedures of interviews, discussions and observations recurring for further explanation) are:

- Investigators observe
- Investigators enquire further
- Investigators seek to explain

In discussing illuminative evaluation the most concerning matters raised by practitioners to date are to do with the subjectivity nature of the approach. This concern is one closely associated with the researcher's own work and which he has attempted to nullify through adoption of an Insider/Outsider approach and coding of data which is consistent with Parlett and Hamilton (1972) as identified in their first point below, can also be reduced through solutions such as:

- *Data can be coded and checked by outside researchers*
 - *The effect the researcher has on the study is recognised, though researchers try to remain unobtrusive*
 - *Researchers need tact and a sense of responsibility similar to that pertaining in the medical profession*
 - *Researchers need to be transparent, open about the aims of their study and to clarify their role*
- (Parlett & Hamilton, 1972, pp26-27)

The researcher believes that such a structured, rigorous and principled approach by practitioners is more befitting the profession of adult education as it develops a greater level of professionalism around the concept of what makes a corporate educator. The researcher also feels that the operational base from which practitioners ply their trade needs to rise to that of professions such as doctors, lawyers and accountants as it signifies a level of expertise, professionalism, ongoing development (as each of these professions requires continuing practicing development) and recognition in corporations with a seat at the decision table.

Finally the researcher draws on Parlett and Hamilton to demonstrate why this researcher closely associates his research with the practice of illuminative evaluation.

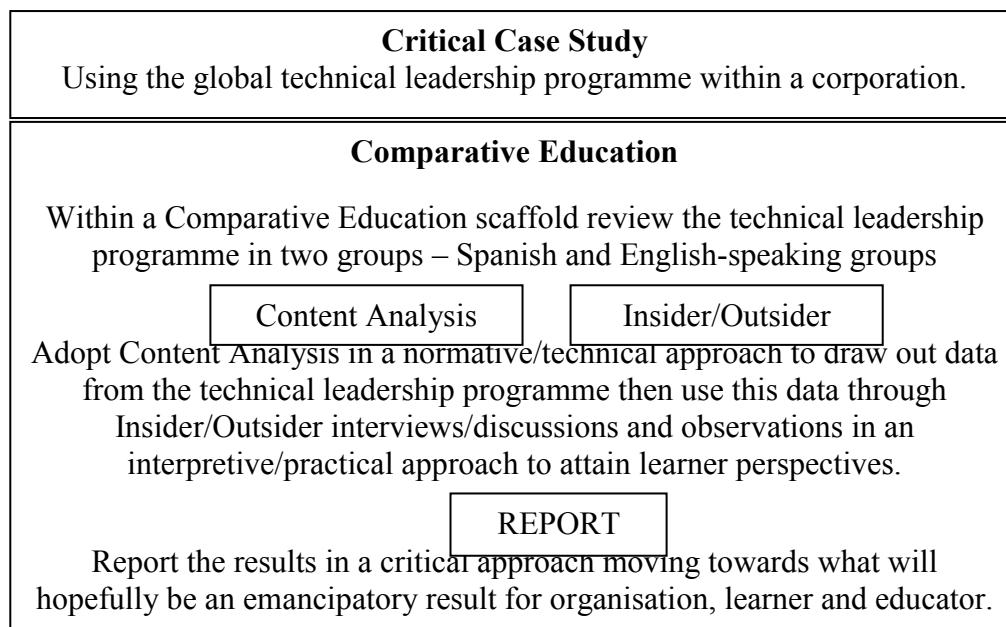
Indeed by discussing a spurious ‘technological’ simplification of reality, and by acknowledging the complexity of educational process, the illuminative evaluator is likely to increase rather than lessen the sense of uncertainty in education. On the other hand, unless studies such as these are vigorously pursued there is little hope of ever moving beyond helpless indecision or doctoral assertion in the conduct of instructional affairs.

(Parlett & Hamilton, 1972, p34)

It is only through attempts such as this researcher's mixed method approach (using a case study within a comparative context employing content analysis and then interviews, discussions and observations through an Insider/Outsider approach),

that not only can corporate educational research demonstrate a structured, rigorous and principled approach (which is also reflexive) as a profession but also as Parlett and Hamilton state above, can the profession begin to move beyond current procedures to advance educational practice. In this context Diagram C provides a summary of the approach adopted within which the specific procedures exist.

Diagram C – The Approach



The selection of the course and groups from English-speaking and Spanish-speaking backgrounds has been discussed previously. Looking at each of the steps in the process was then required with decisions being made in regards to the module.

- Selecting the course module and analysing it for purpose and intention, also using a filter namely Hofstede's 5 cultural dimensions (see below Content Analysis Stage 1).
- Reviewing the module findings with stakeholders and participants to ascertain module meaning, comparing and contrasting these to module objectives (see below Insider/Outsider Stage 1).
- Reviewing the course module again in light of the stakeholders and participants perspectives to ascertain new meanings and objectives (see below Content Analysis Stage 2).

- Reviewing new interpretations of module findings with stakeholders and participants to ascertain module meaning, comparing and contrasting to module objectives (see below Insider/Outsider Stage 2).

Content Analysis Stage 1

Using content analysis the researcher has thoroughly analysed the corporate training resources and materials, specifically the *Technical Leadership – Basic Operation* programme training module. This training module is targeted at managers and supervisors who are new to their role within the context of their position in Operations Terminal Management. The module was examined to determine key concepts (cultural and others), relationships, networks, and themes. Then further analysis was undertaken to draw out the features covered by Hofstede's (2005) cultural dimensions of; power distance; individualism/collectivism; masculinity/femininity; uncertainty avoidance; and long-term orientation. The research used this further analysis to identify, analyse and interpret intercultural concepts that have been woven into the programme. This was then linked to the Insider/Outsider approach.

Insider/Outsider Stage 1

The Insider/Outsider approach took on a tracking affect using the elements from the content analysis to determine how stakeholders and participants interpret the organisation and workplace values, concepts and themes provided through the corporate technical leadership programme module. These were then cross-referenced to the organisational intent and simultaneously reviewed in light of national, local and other cultural perspectives. Further data was also collected from stakeholders as to how they perceive the usefulness of the programme in relation to its capacity to develop them professionally and in relation to promoting their job competence.

Content Analysis Stage 2

The outcomes drawn from Insider/Outsider process underwent further analysis linking back into the content analysis approach for further correlation and confirmation. The aim was to repeat the process a second time to clarify and

confirm and to explore deeper meanings and themes. This also provided a final set of data and questions on programme concepts and the relationships that provides for the final stage of Insider/Outsider interviews.

Insider/Outsider Stage 2

This was a final collaborative approach taken with participants and stakeholders to check and clarify final meanings whilst also reviewing potential changes and improvements. Adopting such an approach helped to ensure that the overall research methodology was self-checking as the researcher moved from one method to another and back again defining, questioning, checking and redefining.

The two approaches of Content Analysis and Insider/Outsider were both needed by the study to be able to draw on each other's findings and in so doing to explore their symbiotic relationship which allowed the researcher to obtain the clearest and best results. See below Diagram D (Method Diagram) that demonstrates this woven approach in more detail.

Adopting this type of multiple method approach strongly supported the researcher's intentions to have investigated the existing curriculum, described the existing situation from the perspective of stakeholders and participants, translate the cultural factors that are in operation and to have provided sufficient data for possible transformations and changes in policy and practice.

Diagram D – Method Diagram - (Read from Bottom to Top)

INSIDER/OUTSIDER STAGE 2 – Draw out information from Content Analysis Stage 2 to observe, interview and hold further discussions with the English and Spanish-speaking regional and country trainers(as per normal course of business), towards attaining data with a view to re-enforcing Content Analysis Stage 2. Attain data to use in reports/proposals, etc. Gather opinions and feedback (as per normal course of business). Ensure approach is all-inclusive and working with the groups.

CONTENT ANALYSIS STAGE 2 – Conduct the same practice used for Content Analysis Stage 1 again, this time using and combining data from Insider/Outsider Stage 1 to identify new codes, categories, relationships, networks and maps.

INSIDER/OUTSIDER STAGE 1 – Drawing on references and findings from Content Analysis Stage 1 conduct observation, interviews and discussions with English and Spanish-speaking regional and country trainers (as per normal course of business). Attain data to revisit Content Analysis Stage 1. Ensure approach is all inclusive and working with the groups.

PREPARATIONS FOR INSIDER OUTSIDER – Based upon results from Content Analysis Stage 1 determine what is to be analysed, who is to be used in terms of assistance and if required conduct train the trainer researching and sort out language translation issues if they exist, etc.

CONTENT ANALYSIS STAGE 1 – Conduct various Content Analysis using data from the Training modules. Ensuring that Concept/Manifest and Relational/Latent approaches are taken; Coding Guides established including Kappa scales, Priori codes, Translation and Generalisation rules; Identify cognitive and mental model possibilities; Ensure categorisation is mutually exclusive and exhaustive; Identify relationships in terms of strength, sign and direction; Identify networks; Conduct statistical analysis and Perform Mapping.

Research Sample

The research population could have potentially comprised of up to eighty or more trainers spanning the globe. Not only would this number of participants have provided a greater array of responses and results but this also would have attained input from all participating trainers making the buy-in and take-up of any future results and findings potentially easier to achieve (if agreement by all eighty was reached, which historically has not been possible). This would have also matched the researcher's expectations in that the main focus of any scientific study should be for the benefit of the total population of potential users: in this case the country trainers. Unfortunately a study as large as the population of all the country trainers within a multi-national corporation presents several down-sides and disadvantages such as the available resources, expense and time. As discussed earlier under the *Delimitations and Limitations* section within this chapter, such a large group of country trainers is at risk of being so large to be able to establish any meaningful findings. It would have been a large-thin study instead of a small-thick study.

Considering these factors it was appropriate to select the study group which would provide a meaningful perspective. Similarly, the sampling technique adopted needed to take into consideration the following aspects of the study to ensure a true representation:

- Time in role as a trainer of population;
- Maturity of population;
- Experience as a trainer in relevant corporation of population;
- Seniority of trainer as a well recognised practitioner whom others look to for advice and guidance within population;
- Ability as a trainer to affect and create change within population; and
- Confidence of trainer to be able to conduct evaluation and self-reflect on courses as a trainer and in regards to the population.

The choice of the subset of the population finally chosen needed to also consider the following issues and constraints in regards to the study and also the wider circumstances regarding the investigation:

- No special funding;
- No additional resources;
- In the end given changed circumstances, little to no support from Management to complete a study that might impact upon real-time tasks and day-to-day work;
- A global financial crisis and European meltdown that inhibited all aspects of industry that did not directly and favourably impact the organisation's bottom line; and
- A population of country trainers handling the above points leading them to experience a range of emotions from fear of loss of job to actual redundancy in some cases.

Considering all of this, it became apparent that while the sample group that may have been selected could have come from across many countries, the risk of putting such country trainers – already in a tenuous and fragile situation – into even greater risk was never an issue from the researcher's professional, ethical and personal perspective, as he would never do anything to jeopardise anyone's role.

In light of this the direct group was reduced to those who were not at risk: being the researcher and his colleague as regional trainers who had both previously worked with the course in their countries respectively and were now working at a senior level that still held them accountable for the course rollout and success. This direct first primary group was still a realistic sample (as most real world training scenarios consist of a single trainer) as the researcher being a part of this primary group had close proximity to the country trainer population as he dealt daily with this group and he could conduct and check his research study and findings with the country trainers on a day-to-day basis as part of normal business practice without impacting the country trainers in any different manner or in any negative way.

This then made the secondary group of country trainers an indirect sample that were selected based on similar criteria as that of the primary group (such as time in role, experience, maturity as a trainer and more). It should be noted that the

country trainers that formed the secondary group were made up of ten Spanish country trainers and twenty five English-speaking country trainers. Each of these groups responses were taken anonymously, always being generic and representing a group perspective. This meant no notes on individuals were ever made as feedback attained was always through general discussion data collected as per normal business practice whilst the course module was being trained as part of the train the trainer process.

It was from this set of primary and secondary groups that the study was able to continue with a level of validity, scope and reliability.

There was a realisation that this group of participants, despite being sound in terms of presenting no issues or impacts to the population, had some possible adverse aspects as a result. The fact the researcher ensured all of the secondary group population were presented in terms of group responses (meaning individual responses were not represented) could infer that it is not a sample fully representing the target population. Similarly, the researcher also determined the primary sample group deliberately choosing the regional trainers individually to participate in the study. Considering this, the research study is somewhat reduced in its ambitions as it does not provide probability sampling for the study with the researcher selecting the sample. Instead the sample groups used by the study demonstrates a non-probability population sampling method, which can still be useful in conducting a qualitative research case study looking to extract findings largely for hypothesis development, which as previously discussed this study also aims to do.

Template

Though the groups for this study were reduced by the adoption of a non-probability sampling method, which could translate in the instrumentation required for this study not being of major concern, the study itself still provides a template so that the study stands in itself as a guide to practitioners engaged in the process of conducting a similar type of study in their own workplaces. So whilst part of the researcher's investigation is to find a solution to the researcher's thesis hunch it is also to demonstrate a process which others can use in attempts to

improve their day-to-day practice. Whilst not a clear cut clinical tool this also makes the study somewhat of a template instrument in terms of a guideline for other practitioners to use and follow.

The research study therefore is partly concerned with developing a research template but more so with developing the case which demonstrates the need for such an instrument. This is to be used in a semi-structured process to allow others to identify the importance of having a template to follow that will assist them to study their own practice. A basic template to be used in conjunction as a guide for this research is suggested under Appendix C and D.

The findings and conclusions that resulted from this process provide evidence that the procedure being modelled (and proposed for other practitioners to adopt) was beneficial in its attempt to improve corporate education. This may in turn demonstrate that the process though used here on a limited scale with a small group is robust enough to be adopted by practitioners for use in their day-to-day practice. This is to some degree in line with the views of Fox and Bayat (2007) who describe such a study as an investigation conducted on a small scale to determine whether the research design and methodology are sound and effective.

If we view this approach as a template, then it makes it easier to adjust areas of misunderstanding or confusion without costs to resources or funds, and thereby also improving the reliability of the research study. Whilst the template is used, the researcher can simultaneously determine if the procedures of distributing and collecting the template results – in this and possibly most cases a questionnaire – are working effectively. If administrative procedures are faulty, they can also be rectified during the process. In short the template can be of great assistance in the debugging of research procedures. So once this is completed then the data collection process can commence. Again in the case of this research study the researcher's use of a template is very flexible as he worked in a semi-structured environment with a small group that allowed him to make corrections *on the fly* without any impact to process, group or data integrity.

Data collection is discussed in the next section of this chapter. It is important to note the data derived from using the template assisted the researcher in identifying the fine-tuning and adjustment required to make the template more useful. In short “*is what you asked for, what you got?*”

In the case of this research study, the template again was flexible as previously discussed, and was set this way to demonstrate the ease with which such a study as this can be completed. Whether the template itself is effective can only be determined by its use. Whatever the findings were the demonstration of the use of a template as a research study tool should not be under-estimated, restating that this research study also aimed to demonstrate that it could be a valuable guide and template for practitioners to follow with their practice.

Data Collection

Collecting data is paramount to the research process. Just as important is the need to adopt appropriate processes that will facilitate the use of this data to illuminate the research questions. The principal process adopted could be described – as Clough and Nutbrown (2002) explain – as a type of “*radical reading*” of artefacts such as documents and training materials and “*radical questioning*” and “*radical looking*” using feedback (from interviews and discussions) and observations. These processes provided the researcher with other *voices* to assist in identifying *positionality* (the researcher’s position), which is critical to building a complete and sound research methodology. It is important to review the context of these documents and training materials along with the feedback (from interviews and discussions) in relation to the study which are now discussed below.

Document/Training Materials

Central to the research was the document/training content of the corporate technical leadership programme, which included participant and facilitator guides, course materials including pre- and post- workshop assessments, and any related transportation curriculum content that not only involved the programme but reviews and critiques of the programme. In terms of developing a frame for the content analysis that was also related to the research aims a Conceptual/Manifest process

was taken to identify the existence and frequency of concepts (explicit and implicit). Once this initial process was completed to collect data at the conceptual level, the researcher took similar action using the Relational/Latent process to collect further data and transform it into a final format ready to be used for further analysis. (Refer to Appendix E for both the Conceptual/Manifest and the Relational/Latent processes that were used by the researcher.) Each of these processes, as discussed by Krippendorff (1980), provided a step-by-step approach which allowed (through coding, sampling and other steps) the researcher to identify what was and what was not important to analyse. Once the items of importance were identified it was critical to draw them out for discussion with the participants who use them which is where the next process of feedback played a crucial part.

Feedback

The feedback obtained through interviews and discussions with the English-speaking and Spanish speaking regional and country trainers provided qualitative information in the form of transcripts as to: how the participants interpreted the organisation and workplace values, concepts and themes provided through the corporate technical leadership programme module and how the stakeholders (in particular the regional trainers) perceived the usefulness of the programme in terms of their professional development, as well as in terms of their on-the-job competence. Data was further clarified through the analysis of the information contained in the transcripts into categories, theoretical explanations and possible inferences. These were then further developed into patterns and trends recognising consistencies and deviances in behaviour. Throughout this process the emphasis was on dealing with the data in a manner that demonstrated that what had been uncovered, analysed and displayed is *real* (that is true-to-life), credible and potentially useful to practice. The researcher realises that this feedback process is critical but also that though communication is often seen as being verbal it can also be more about what is not said through non-verbals such as body language. Therefore, coupling the feedback with observations was a supplementary process which is further explained below.

Observations

The observations were conducted with the English-speaking and Spanish-speaking regional and country trainers who were working with the corporate technical leadership module. They encompassed real-time classroom training workshops whilst the corporate technical leadership programme was being delivered to country trainers. The lens being used for the observations varied from that of a participant within the natural setting of the classroom using an unstructured approach to that of the trainer presenting the module using a structured approach and finally to the observer who was examining both the regional and country trainer within the classroom using a semi-structured approach. The planned observations provided an array of information, which, when mapped, could be broken down into conscious and unconscious behaviours.

Data collected through the feedback and observation stages took place over the course of a year. This initially started with face-to-face workshops which the country trainers attended to learn about the course and module and then continued with tele-workshops (conference call workshops) where specific programme elements were discussed and modules reviewed. It continued with further face-to-face workshops during the year and finally ended with smaller group tele-workshops with individual and combined groups of countries.

Information collected from the document/training materials, observations and feedback over the year which the study took provided data regarding organisational concepts and themes and their intended and actual impact for change in worker behaviour. This data directly addressed the research question, which is concerned with the relationships of organisations with their corporate education programmes, the various cultures these work within and ultimately the learner's translation of such educational experiences into productivity. The analysis of this data is detailed within the next section of this chapter.

Data Analysis

The data collected was regarded as confidential and therefore was stored and handled in a highly secured manner. Original materials have been retained in a

locked file cabinet. They are organised in such a particular way that any individual respondents cannot be personally identified.

Data being analysed was collected and reviewed using a range of approaches and methods including conceptual and relational data processes. The result of these processes produced the data maps which revealed concepts and their associations.

Taking these maps and examining them using a correlational method produced material, from the conceptual and relational processes, that could be analysed to determine inter-relationships. The resulting relationships were then used to identify the direction of their relationship and its magnitude.

Though methodology was discussed previously, it is important to review it again but this time under the lens of data analysis. This is done so as to provide a level of transparency for practitioners as to the reasons why the methods of Content Analysis and Insider/Outsider were selected specifically from a data analysis perspective and also to recount the effects these methods had on the data analysis process. It is hoped that the study will again demonstrate for practitioners that consideration to their methodology process is closely related to the data analysis process that in turn has an effect upon the study's findings. The need to reflect upon the methodology under the lens of data analysis also provides a template for practitioners to follow with their own process and may even require them to re-examine their research methodology should it not be conducive or relative to their data analysis process.

In terms of the methodology under the data analysis lens, content analysis was considered crucial in examining the gaps that appeared to exist between the organisation's aims and the learner's identity in achieving the goal of working together. The focus for change from the organisation's perspective was considerably on the programme, so again content analysis was essential in order to closely examine the programme. Other reasons why content analysis was determined as imperative as a method for data analysis include:

- It has the potential to provide a study of processes occurring over a long period of time, in terms of course and programme evolution;
- It allows the analysis of the documented communication within the organisation and field being studied in terms of who said what to whom;
- It is an unobtrusive method in that the content analyst has no effect on the subject being studied as the courses and programmes have already been written, and implemented;
- As the materials are concretely recorded in a programme module, they can be reviewed, recoded, re-analysed at any stage, whereas with field observations and other methods there is often no second opportunity for a similar review; and
- It is ideal as a starting point for the research allowing time to come to a greater understanding of the topic without the risk of affecting others or using costly resources except for the researchers own personal time.

The Content Analysis method provided maps and findings that linked into the second method - that being Insider/Outsider process. The Insider/Outsider process saw data being obtained in a raw format through interview and discussion transcripts. The interviews and discussions included regional trainers and country trainers. Raw data was also produced as the Insider and Outsider roles recorded descriptions and explanations of their observations of participants in the real time situations that occurred. This first stage of data production was not particularly and directly meaningful for the research process as it was a simple retelling and was not yet fully functional research material. The methods of analysis that were then applied to this raw data to create a secondary set of data (which was more suitable for use as research materials) included: Identifying Ideas and Themes; Creating a Data Directory; Cataloguing; and Mapping the Situations.

In terms of the methodology under the data analysis lens, the Insider/Outsider process was needed because it provided the optimum method to address the phenomena of two differing cultures of which the researcher was only able to provide direct personal insight into one (that being English-speaking), but through his colleague was able to also include a second (that being Spanish). As suggested

by Clough and Nutbrown (2002), adopting Insider/Outsider also helped to attain a level of objectivity through the use of another method to continually recheck and to validate the findings. Other reasons why Insider/Outsider was determined as imperative as a method for data analysis include:

- It provides the research with access to countries, cultures, contexts and other factors that an outsider would never be able to attain;
- It allows for opinions to be unearthed and analysed from all stakeholders, providing for a more sound methodology;
- The Insiders will not just be data sources as they will also be involved with the research design, collection, analysis and reporting. This was part of the intention in using this method as it allows for *buy-in* from other corporate education practitioners thereby providing synergy and what could be *ownership* to maintain any later relevant outcomes from the study; and
- Finally the Insider/Outsider approach augments the comparative method by providing both an English-speaking perspective and a Spanish perspective across a range of interviewee and interviewer levels.

Combining the two methods of Content Analysis and Insider/Outsider as part of the methodology was recognised as challenging but it worked symbiotically drawing out information through a data analysis process that identified new concepts, units of observation and analysis, themes, networks, relationships and maps. The method and approach, as previously displayed under Diagram D, provides a map in an ascending order that develops to a situation where it can be seen that two methods can be used to take advantage of each other in areas such as responses and findings. Within this approach, there is the option for another approach to be added to create greater validity for the overall methodology. Implementation of this extra method is raised as a guide to practitioners to demonstrate the ability to add greater robustness to the research study. The determination of whether or not an extra method was required will be largely determined by the study's audience, though in other realms it may also include sponsors, profession, participants in the practitioner's faculty or academia and their need for a particular type of information to be drawn from the study.

Chapter Summary

The aim of this chapter was to set out the methodological approach taken by the study including any problems and complexities. It provided not only an overview of the approach taken by the researcher and why the path taken was adopted for the study but also explained that another objective of the study was to provide a template for practitioners to use and follow in researching their own practice.

The chapter covered areas of the study such as the selection of Case Study method, Participants and Materials. There was similar coverage of the Ethics along with the Delimitations and Limitations involved with the study. These all provided greater insight into the elements involved with the method and approach that the study undertook. A discussion and explanation of the Procedures that the study would take was also given. This in turn led to a discussion on the sampling approach which the study needed to adopt and the related population groups. With a greater understanding of the population and group from which the sample would be taken, the chapter moved on to consider the importance of instrumentation and how it was designed to provide a degree of engagement with the field and population.

With data *on the table*, finally the chapter turned to a discussion of how this data would be analysed to provide meaningful findings and results that could lead to recommendations, improvements and change of existing practices.

It is hoped that the reader not only has a clear understanding of the what, how, who, why, where and when of the research methodology but also understands how the approach taken aims to build robustness and durability in regards to the findings and results of the study.

On a final note it is also hoped that the objective of providing a guide for the practitioner is also realised, allowing this study to act as a possible template for future research and practice. This may become more evident in the coming chapter where many of the aspects discussed within this chapter are displayed in practice.

4 – FINDINGS

Objective of this Chapter

This chapter will set out the findings of the study so that they can be reviewed and analysed. This is done by first outlining the plan of the study. The findings are then set out in the context of the study's process, that is, Content Analysis using an Insider-Outsider perspective. There is further discussion of the findings in terms of past elements, hunches and the research question along with an explanation of any other findings which the study revealed. The researcher hopes that by doing this the study can provide a guide and template for practitioners and researchers to follow with their own work.

The Plan of the Study

Previously, within Chapter 3, an outline of the procedure to be used by the study was given. This section of Chapter 4 now aims to show how those procedures were applied to the study to produce the study's findings.

With this in mind the researcher will report his findings in three ways:

- The basis of the findings needs to be understood; hence the module and its setting needs to be explained as The Module;
- The major focus of the study is to address the research question so there will be major discussion of this as the Actual Findings; and
- Discussion of these findings in terms of previously discussed elements, hypotheses, research questions and potential other findings, will occur under the heading Discussion of the Findings.

The above will also establish the other focus of the study, which is to provide a possible guide for practitioners, also woven into the discussion.

Origin of Findings – The Module

The training module is the focus of this study. Thus it is critical to position it and set the scene from which the module was developed and similarly disseminated. Both the development and dissemination are equally important to not only understanding the corporate organisation's approach to education, but also the effect this has on the module, participants and the overall culture of the organisation. Remember, the training module selected to be reviewed by the study was chosen because it was useful on two counts being:

- It is a module similar to the one most companies use to begin their technical training process, providing a sound understanding of the basis of their operations.
- It is not too basic nor too technical, which is critical in providing a sound template for practitioners to follow as a guide when completing their own studies on the wide variety of programmes they teach.

In short it is non-organisational specific and simple enough to allow comprehension.)

The programme (from which the module came) is like so many other corporate training programmes that provides management and leadership education for supervisors and managers within their organisations. Such courses normally run for several days to allow for a greater level of induction and all provide some level of motivation and corporate drive to enthuse participants to return to their workplace and use their newly found corporate skills and follow the corporate agenda. These types of courses from the researcher's perspective are often strategically engineered and purposefully developed to build confidence in the new supervisors and managers. These courses also generally allow for existing long-term supervisors and managers to attend to demonstrate the experience and wisdom that they have gained over many years. This is done (by the facilitators) in a process that has these long-term supervisors and managers leading the way for the *newbies* to follow. This process lends credibility to the course, which is shown to be current with contemporary practice and standard operations. In many cases, the courses are built upon this premise and then used to also deploy other new approaches and standards, which are simultaneously tested and re-engineered in the training room through pilots/trials in the early stages of the course's rollout.

It is also a good course engineering principle from the researcher's perspective to see that these early pilots and developmental stages include as many Country Managers and Senior Managers as possible to ensure that the course is tested, re-engineered, modified and endorsed before any country participants at the lower hierarchy levels such as managers and supervisors attend. This early piloting and re-development of the course ensures that the course is fully sanctioned by the higher level Senior and Country Managers. However, and admittedly, this top down approach while ensuring the course's compliance with and adherence to corporate managerial culture by all, may in some cases not necessarily be the ideal approach to attain a clear view of its application in a real day-to-day situation at the *shop-floor* level. Worth noting is the fact that many of these types of courses whilst being developed in the headquarter location of companies are also often developed by expatriates who are at a level even more distant from the *shop-floor*. In the researcher's experience to date in some cases the courses are developed for a specific region and when they are found to work to whatever degree, are then rolled out verbatim globally with little to no modification. This takes the one size fits all to a wider degree that sees regions and countries often needing to make substantiative reviews and potential overhauls of such courses to ensure they fit. In many cases, however, this re-engineering does not take place and the message and intent of the course is sometimes *lost in translation*.

These courses usually open with Senior Executives, Managing Directors and CEOs espousing corporate growth, development and the importance that the course participants must play in ensuring that the growth of the company stays positive and hence their jobs continue, as was the cases experienced by the researcher. The opening session of such courses, without meaning to sound or be derogatory, are *a parade of champions* demonstrating how the overall company out-performs competitors and leads the world in notable areas such as sales, best practice, market share and much more. To confirm these facts Executives from Sales, Customer Service, Operations and more provide a symposium of presentations through the course at the outset – usually on Day One – to demonstrate to the attendees that they work in a company that is the best. In instances where the company is not yet *Number 1*, then a similar presentation shows how the company is nearing the top.

Overall, the organising principles of the course are clearly stated at the outset, that is to keep pace with the growth or status quo that *we* have worked so hard towards for so long, the participants must adhere and comply with what they are about to be told. Otherwise the *we* approach taken to date will not be maintained and the company will potentially decline and possibly collapse in the face of adversity and a global marketplace where *win-lose* is the order of the day. Examples of competitors who have left the market are shown and discussed as examples of this and their lack of adherence to corporate requirements. Again whether such an approach is good strategic training practice or even reality in light of the global financial crisis and lingering world economic uncertainty is unclear. What is clear is that this is the approach that calls on participants to trust and believe in the corporation as a solid basis and platform for their careers that will only further grow and flourish if the participant learns and adheres to what is to be taught over the coming days. It is also made quite clear that not following the company line could result in the demise of the company. It is then at this stage that the company Vision is presented and deconstructed for all participants to see and understand clearly that their company has a plan to continue to grow and lead the market. It is also at this stage that the company Mission is also unveiled and broken down into parts so that participants can clearly see their role in the continued growth and development of the company. The emphasis here is that there is a symbiotic relationship between company and participant to instill a sense of unity and a *together we grow* attitude. All of this company background and education is completed by the first morning of the course so that the setting for an afternoon of corporate team workshop activities usually ensues on a similar note.

The corporate ethos is compounded and consolidated throughout the afternoon of the first day through many team physical exercises and activities. None of the exercises or activities is intended to be embarrassing or demeaning for any participants as they usually all conform to basic physical requirements thus allowing everyone who tries to succeed. The intent of the activities are more to demonstrate a unity with others and with the corporate ethos in working together and co-operating to beat an imaginary competitor. Again this is a good example of sound strategic training that builds relationships amongst participants who have

never met through pursuit of a common goal which is to work as a team under the corporate umbrella. Finally, the first day normally comes to a close with the usual bonding over dinner and continues long into the night with the usual *cultural playside* of the corporation kicking in: *we work hard together so we play hard together*. This continuing evening session is often where, through intra and inter personal processes, the participants begin to positively respond and open up to the course in the informal social settings that often features fine food and alcohol (if desired) supplied by the corporation in a relaxed evening atmosphere.

To summarise, Day One of the Course features: a corporate demonstration of Executives presenting the strength of the company and brand in the marketplace, the strength of its Vision and Direction, the role each individual employee plays through the Mission, the power of teamwork in corporate activities and the greater team-bonding over dinner and drinks that caps off a unity and commitment by all. This is not to forget the pre-work participants completed before they attended the course, which usually takes twenty plus hours to complete or forgetting the surrounds of the four/five star hotels that attendees are staying in during the course.

We are now at a point where participants who arrive to take their seats on the morning of day two of these types of programmes are in some cases dressed the same, wearing the course polo shirt with emblems of the company and brash mottos such as “*We are the best*” embroidered into the polo fabric and potentially their mindsets by this stage. They are at the start of day two seated with their colleagues who they have now bonded with very closely over the last twenty four hours and have begun to be considered not only as a colleague but also as a good friend. This sets the scene for the introduction of Day Two which after a recap of Day One dives into the first of the course modules which is normally a basic operational module. Having just described the typical course setting that is the basis for this study from the researcher’s perspective, this first basic operational module that is usually presented at this stage if the focus of this study and from which the study’s findings come.

Actual Findings

The following provides a recount of the actual findings made within the study. These have been extrapolated by applying the previously discussed research methods and procedures to the course module and depicted in this way to provide a template for practitioners who may wish to use this study as a guide.

Content Analysis Stage 1 – Level 1

The module being studied for the sake of this study we shall call Basic Operations as it is common in many corporation technical leadership programmes from the researcher's experience to date to commence with such a common basis that all participants can understand. Teaching that relates to this module usually includes powerpoint slides used by the trainer in class so as to structure discussion; a paper based hard copy of these slides is included in the participants workbook folder together with a course booklet covering branch operational guidelines. Though the purpose of the study is not to understand the modules actual content, it is important to explicate the module purpose beginning with the module's objectives:

Module Objectives:

By the end of this module you will be able to:

- *Describe the role and responsibilities of a Branch Manager*
- *Recognise the corporations operating systems*
- *Name the main critical drivers for optimal management*
- *Explain the importance of standard operating procedures*

The next step in conducting the Content Analysis Stage 1 was to review the module using a Concept/Manifest and Relational/Latent approach to identify and analyse the key concepts, relationships, networks, ideas and themes embedded within the content. Refer to Appendix E for the process steps of this approach (of which this study did not need to complete every step), of which a summary is discussed below.

Concept Manifest Process

With the reduction in sample and participants involved not all steps within the concept manifest process were required leaving the following as the main steps taken being: Adopting a priori code; Identification of Items such as Key Concepts, Relationships, Networks, Ideas and Themes; Reviewing of items in regards to existence and frequency; and Recognising patterns and trends emerging prior to the next stage being the relational latent process.

In terms of adopting a priori coding system based upon the objectives of the course, the following key terms were agreed upon by regional trainers to be used as both sampling units and context units for the content analysis.

- Key Concepts – People, Quality, Cost, and SOP (Standard Operating Procedures).
- Relationships - Role of a Branch Manager, Managing, and Operations devices.
- Networks - People and resources, and Company Systems such as inputs and outputs.
- Ideas - Lead and Direct main activities such as outgoing and incoming, Intelligent, balanced decisions (leading to action on Capacity, Scheduling and Supplies), and Resourcing capacity to increase output.
- Themes - SOP (Standard Operating Procedures) such as Service Improvement, Cost Reduction, Revenue Enhancement, and SOP – Process, Tools, Environment, People.

As much as there was agreement by the regional trainers on the above items there were also disagreements with some of the following not making the list because there was no direct relationship to the module objectives. Which as previously stated set the criteria for the priori coding: Key Drivers for Good Management; Corporate Street-map to Your Facility; Competitiveness through high levels of customer value and satisfaction; and Certification.

As can be seen the identified items that were used consisted of single words and sets of words. However, the framing of these will be reliant on the referential implications they hold in regards to the attitudes, values and preferences that the study set out to investigate. A review of the module text for coding purposes was then performed looking for the existence of KWIC (key word in context) of which the results are displayed in the below table:

Table 2 – Key Word in Context

Item	Frequency
Key Concepts	
○ People	14
○ Quality	14
○ Cost	15
○ SOP (Standard Operating Procedures)	54
Relationships	
○ Role of a Branch Manager	19
○ Managing	57
○ Operations devices	19
Networks	
○ People and resources	5
○ Company Systems – Inputs and Outputs	33
Ideas	
○ Lead and Direct main activities – Outgoing and Incoming	19
○ Intelligent, balanced decisions	8
○ Resourcing capacity to increase output	5
Themes	
○ SOP(Standard Operating Procedures) – Service Improvement, Cost Reduction, Revenue Enhancement	52
○ SOP – Process, Tools, Environment, People	35

Emerging Patterns and Trends

At this stage it was possible to see patterns and trends emerging such as:

- The concepts of People, Quality and Costs are inter-related and similarly their presence throughout the text usually occurs at the same place;
- Similarly the role of the Branch Manager is in sync with the requirements of Leading and Directing;
- The idea of Managing listed under relationships has a frequency which indicates its relationship to people, systems, processes and more;
- SOP (Standard Operating Procedures) is definitely trending as the major objective being discussed and raised within the text whether in regards to Service, Costs, Processes, Tools and more; and

- It is also noteworthy to mention that what was considered to be key ideas in some cases were later realised through discussion to be of minor significance.

With an understanding of the existence of the text and text frequency the next step in this study is to look at the relational/latent process.

Relational Latent Process

The Relational Latent process (Krippendorff, 1980) permits the use of what has already been developed through the previously discussed conceptual process.

Considering this it became clear that the stages within this process were to:

- Determine use of cognitive science and mental models, applying this to the conceptual process items;
- Reduce the texts to categories;
- Assign coding to these;
- Create values for the coding;
- Explore sign, strength and direction of relationships between items;
- Code relationships;
- Identify relationship variables and differences for variables; and
- Map these relationships and differences.

It is important to review these items – which are provided on the following pages – to be able to identify the types of data relationships they present from a cognitive science approach and a mental model approach.

Cognitive Science Approach: When looking at this process for his data analysis the researcher kept in mind an important learning from his reading on data analysis:

A scientist's job is to make sense of data, to discover the patterns that govern how the physical world works and encapsulate them in theories that can be used for predicting what will happen in new situations.

(Witten, Eibe & Hall, 2011, pg2)

With this in mind it was possible to identify relationships amongst the items firstly at an initial level as below;

- Key concepts of People, Quality and Costs are constantly linked throughout the text and mentioned together 75% of the time;
- SOP (Standard Operating Procedures) as a key concept within the programme is the basis on which all items are linked together throughout this module. (Later it was also found within the programme to be the underpinning platform for the course as well.);
- There is a direct correlation among the key concepts of People, Quality, Cost and SOP, however, for SOP this is similar to the relationships that SOP has with other items;
- The items listed under Ideas of Lead and Direct has no direct relationship to the item listed under Relationship of Role of Branch Manager;
- However there is a relationship between the Role of Branch Manager and the item Intelligent, balanced decisions as in 80% of cases where the latter is mentioned the former is as well;
- The item listed under Relationship of Operations Devices has a direct relationship with that of the item under Networks of Company Systems;
- There is no direct relationship between Managing and SOP even though they are the only two items to occur on over 50 occasions; and
- There is no direct relationship between the items Resourcing and People and Resources. Considering this, and also that each of these items do not have any impact on other items, it became evident that they would be minor and possibly superfluous in the study moving forward as People and Resources was already covered under the existing Key Concepts to a large extent with the item People, whilst Resourcing was considered too minor an item to continue with as it focused on a minor particular process.

The above provides a basis for the cognitive science approach, however, it is important to also review the items in regards to Mental Models which was the next step to be taken.

Mental Model Approach: When considering this approach for the data, the researcher again looked to the research on data analysis to note:

A mental model is a construct used to explain human cognitive processes of understanding external reality, translating it into internal representations, and making inferences and predictions about the external world from it. Mental models are, in effect, a representation of the integration of conceptual knowledge with the meaningful relationships that exist between those concepts. This definition is very similar to the definition of a conceptual model of a system – an illustration or description of the essential concepts as they relate to one another and function together. ((2000) Susan Colaric. Improving Search Strategies Through Teaching Search Engine System Knowledge: retrieved in 2012 from <http://iteach.saintleo.edu/InstructionalDesign/MMPaper.htm>)

With this in mind, it becomes clear that individual people have their own personal mental model. To ensure congruency with other stakeholders a brainstorming session was held to check meaning and commonality on what each of the regional trainers mental models were for the items identified. The researcher found that there was congruency on all items with no exceptions. With this in mind it was then possible to identify the items in terms of their relationship as inter-related concepts as described below.

By looking first at the items of Key Concepts (People, Quality, Cost and SOP) the study is able to review these initially in a mental model format before the next step of reviewing these in light of Relationships, Networks, Ideas and Themes.

- The concept of People is portrayed within the module as a mental model that is closely related to the concept of Resources. However, there is no direct correlation to this in a mechanized way or in a manner which infers People as being less than human, which other resources within the module are clearly identified as. At worst it could be argued that there is an inference, but not in any demeaning sense. There are relationships between People and other concepts explained below;
- Quality is well set up throughout the module (and later we shall find throughout the course) as a mental model portraying the difference in branding

between the corporation and any other marketplace competitor corporation. There is a loose link mental model that begins to take shape between People and Quality that gets tightened and developed later on in the course's other modules, for which the foundations of such a mental model are laid in this first module;

- Cost is a basic mental model which is endemic in all corporations and with a consistent meaning of savings, reductions, minimisation and more. Considering this the relationship to other concepts is that of decrease costs wherever possible; and
- SOP (Standard Operating Procedures) is born and quickly developed as a mental model within this module that is critical to everything you do as it effects everything. SOP is provided as the *be all and end all* for the module and as we later see for the course as it ties all together including other Key Concepts of People, Quality and Cost.

With clearly defined mental models established for the Key Concepts related to the course module, the remaining Relationships, Networks, Ideas and Themes mental models are easier to portray as they have close relationships to the Key Concepts as described below:

- Relationships as mental models are primarily focused on portraying the role of the course participants as being central to effecting change on all previously mentioned key concepts. The mental model of change (though not specifically mentioned) comes through strongly with the role that each participant must take on in their day-to-day activities;
- Networks as a mental model is similar to that portrayed with Relationships being that the role of participants in linking resources and people that they are responsible for is the key to creating the change for each of the key concepts previously mentioned;
- Ideas link in a basic mental model of thinking before doing, analysing before acting and checking before performing. The items referring to leadership, directing and deciding that come under Ideas are all embedded with a notion of the participants adopting a more considered approach to what they currently do; and

- Themes as a mental model are all SOP (Standard Operating Procedures) related, and therefore as a mental model is identical to the SOP mental model already identified through the Key Concepts.

The simplicity of adopting a basic set of mental models that are similar in many aspects such as Relationships and Networks, Themes and Key Concepts and basic enough in action such as Relationships and Ideas, is testament to the module design in keeping the message consistent and simple in “*do these four things*” (that is the key concepts), “*adopt the change*” (that is the relationships and networks) and “*action them similarly*” (that is take on the idea of think then do) and you meet the objectives of the module and your role (and, as we found out later, what the course objectives also require).

Categorising, Coding and Valuing: With a more thorough understanding of the items it becomes easier to categorise, code and value them as below.

Categories must be mutually exclusive and exhaustive.

(General Accounting Office, 1989, p. 20)

Mutually exclusive categories exist when no unit falls between two data points, and each unit is represented by only one data point. The requirement of exhaustive categories is met when the data language represents all recording units without exception. (Steiner, 2001, p. 3)

Categorising - As the above indicates the study needed to ensure that it took a mutually exclusive and exhaustive approach with the researcher's data categorisation. Fortunately it became evident when researching data that the categories that best fit the researcher's research items could be divided into the two basic groups of Organisational and Local. Organisational covering those items which are corporate wide whilst Local covering those items that are more meaningful at a different level which could be territorial, occupational or other including personal. Looking at the items there is a definite categorization that separates some from others and also items which apply to both.

Valuing and Coding – It is possible to value and then code each item according to its significance. This significance ranges from;

1= very organisational, 2 = moderately organisational, 3= in between organisational and local, 4 = moderately local; and 5= very local.

This valuing and coding also provides a grading for those items which apply to both demonstrating common ground between the two (Organisational and Local).

Table 3 – Categorising, Coding and Valuing

(Legend: O = Organisational, L=Local)

Item	Category	Value & Code
Key Concepts		
o People	O&L	3
o Quality	O	2
o Cost	O&L	3
o SOP (Standard Operating Procedures)	O	1
Relationships		
o Role of a Branch Manager	L	5
o Managing	O & L	3
o Operations devices	O	1
Networks		
o People and resources	L	4
o Company Systems – Inputs and Outputs	O	2
Ideas		
o Lead and Direct main activities – Outgoing/ Incoming	L	4
o Intelligent, balanced decisions	O	2
o Resourcing capacity to increase output	O	2
Themes		
o SOP (Standard Operating Procedures) – Service Improvement, Cost Reduction, Revenue Enhancement	O	1
o SOP – Process, Tools, Environment, People	O	1

This provided a greater level of analysis for those items that can be further strengthened by identifying relationships amongst them, in light of this new coding.

Item Relationships: There is a need to explore the sign, strength and direction of relationships between items to better understand the reasons why certain texts were used over others and to discover any other correlations, similarities and variations. These, however, are not always available for all data as the discussion, which follows, demonstrates across the items.

Strength of Relationships – This scores the degree of relationship strength when items are of equal significance and definitive absolutes, in this case the scores were either graded at 1s or at 5s. There were not many items which met this. The ones that did were SOP (Standard Operating Procedures) and Operations devices, both being strong in regards to Organisational value. This is due to both being new practices the corporation wants participants to engage and comply with.

Sign of Relationships – This looks at concepts (positive and negative) held by items. An example is seen in the Key Concept of SOP (Standard Operating Procedures). The use of words such as Standard in relation to the Operating Procedures indicates a definite approach that must be taken as it is accepted universally as the way to do things. This indicates the correct and positive approach to take is one set by the corporation as it complies with all scenarios. Operations devices has similarly been identified with use of the word devices signifying all operational issues can be resolved by use of the corporation devices. This device is the panacea for anything the participants would need, demonstrating that the correct and positive approach is only attainable through following corporate compliance. There are no further sign of relationship items, suffice to say the SOP item is the strongest one not only in this module but throughout the course.

Direction of Relationships– This looks at recognising the type of relationship categories dependent on each other to assist in gauging whether the texts are silos, deeply interwoven or sparsely linked. The corporation would view and hope all others also view that without SOP (Standard Operating Procedures) and Operations devices all other items are independently working but not as efficiently as they could be. This is possibly a tenuous claim considering the corporation has performed well and profited year on year in many cases where SOP has never existed. There are possibly other stronger examples that could be used to demonstrate the direction of relationship such as the need for consideration of People, Quality and Cost for businesses to operate efficiently. The importance of items such as intelligent balanced decisions in accordance with items such as Role and Managing are equally crucial for sound operations, demonstrating the enforcing direction that the corporate edict requires for relationships to take.

Coding and Mapping Relationships for Variables and Differences: Content analysis is never ending and similarly this research and approach using content analysis could also continue delving deeper and deeper into items and their various nuances. The research study needs to draw a line under content analysis and does so after completing a final review of the items in regards to; Mapping the relationships; and Coding the relationships using a scale of:

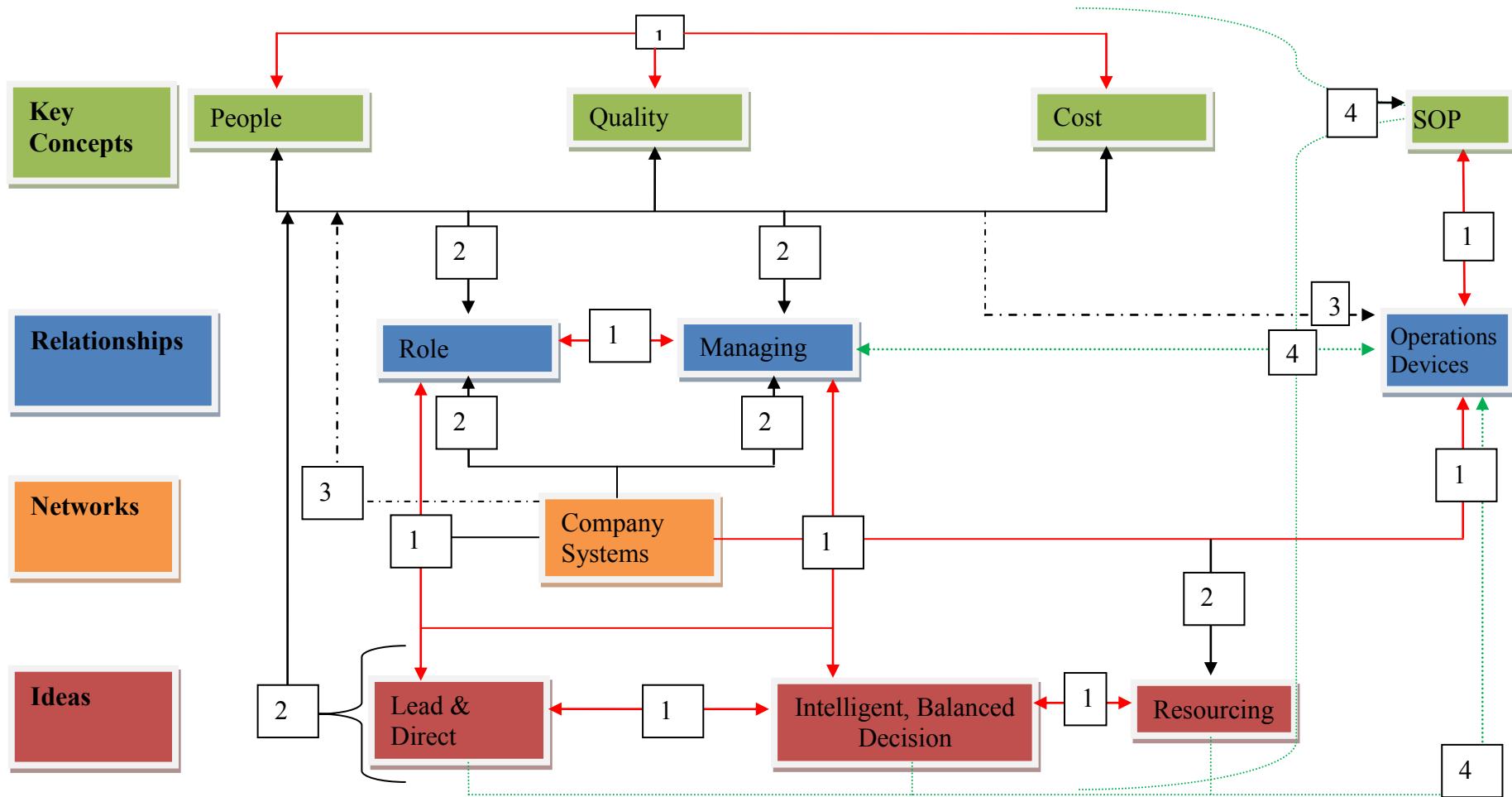
- 1 = Strong (red lines indicate this)
- 2 = Mid Strength (black lines indicate this)
- 3 = Average (black dashed/dotted lines indicate this)
- 4 = Low Strength (green lines indicate this)
- 5 = Minimum Strength (no line will indicate this)

It then takes a process of: Identifying relationship variables; and identifying the differences for these variables.

Refer to the next page map (Diagram E) to view the representation of the above and more.

Diagram E - Coding and Mapping Relationships (for Variations and Differences)

The map does not include duplication hence Themes which were SOP (Standard Operating Procedures) and People and Resources from Network are omitted as they are covered under Key Concepts.



When looking at variations amongst the items the following becomes evident:

- SOP (Standard Operating Procedures) and the Operations devices being organisational creations have strong links to each other hence their rating of 1.
- SOP is rated a 4 with everything else because it is yet to be implemented at this stage and therefore holds only tenuous intentions and relationships with other items.
- Company Systems which have been in operation to date are one and the same as the Operations devices hence their rating of 1.
- Similarly Company Systems and Resourcing which has also been in operation to date have a strong link hence their rating of 2.
- The difference between the Key Concepts and Ideas is that though each has been taking place there has not been a previous directive that has been made for these to be done in sync which is similar to Key Concepts and Relationships which also rates a 2.
- The Operations devices is rated 4 with Ideas and Relationships as though it has been occurring it is a new concept as a collective term for all systems and processes. Similarly it has a 3 rating to the non-SOP Key Concepts as it has been in operation as part of existing systems but not as a concept of an Operations devices.
- Company Systems and the Operations devices have a 3 rating in relation to the Key Concepts as they are identical and though in operation have yet to be provided as a directive linking into People, Quality and Costs.

Besides the above-mentioned differences already covered the main variation between SOP (Standard Operating Procedures), Operations devices and Resourcing is that they are recent organisational initiatives. In some cases though, they have been occurring in operations such as Company Systems. The difference is that they are now grouped and have more content included into these items than previously. This in some cases is a large variation such as in SOP (Standard Operating Procedures) yet is a minor variation in other cases such as Resourcing and Intelligent Balanced Decisions. Either way it is important to be aware of these differences and variations as the study progresses.

Content Analysis Stage 1 – Level 2

This next phase of content analysis looks to discuss the items identified in light of Hofstede's (2005) five cultural dimensions of;

- power distance;
- individualism/collectivism;
- masculinity/femininity;
- uncertainty avoidance; and
- long-term orientation.

Each of these provide a lens to view the key terms from a cultural perspective which contributes to better understanding the process of learner's ability or inability to adopt and use the module. Hofstede's five dimensions also provide an easy to understand lens which is of mutual benefit to practitioners who can follow this research study like a template and the organisations that will look to tangibles to which they can relate and make sense of, such as the five dimensions provide.

Power Distance

This is the extent that lower level employees of a corporation accept and expect that organisational power will be distributed unequally with the lower the PDI (Power Distance Index) the more equal and democratic. In regards to the relationships of the items identified it is important to note that the module has a high PDI in relation to items such as the SOP (Standard Operating Procedures) and Operations devices as these are presented to the trainees as directives by the organisation that must be adhered and complied to by all. The remaining items have a low PDI , which not only fits well with the module and course but also is in sync with the participant's managers who in most cases already practise a fair degree of equality (that is low PDI) in their interactions with each other.

Individualism vs. Collectivism

This is the level of personal and individual freedom within a particular group/society that may exist as opposed to those other groups/societies that are more focused on the group, team or organisation outcomes over those of the individual member. Though there is a low PDI for most items, there is a high level

of collectivism which underpins every item. This collectivism extends from SOP (Standard Operating Procedures) in which everyone in the organisation is expected to comply with to Resourcing (another corporate specific term referring to how managers are to use resources in terms of employees and other resources) that, while seemingly based on individual management style, still expects a high level of conformity in order for each manager to play their role within the organisation. Collectivism as an approach is endemic to most of the organisation, as unlike other cultures, the infrastructure of the organisation relies on collective action and staff compliance to achieve business outcomes.

Masculinity vs. Femininity

This dichotomy seeks to determine whether organisations are more masculine in terms of competitiveness, assertiveness, materialistic, ambitious and power focused over the more feminine aspects of relationships, emotion, caring and a focus on quality of life. The organisation is definitely more masculine as it functions in a blue collar industry where men are predominant in the workforce at 90% or more. This fact alone does not guarantee a masculine culture, but the steady promotion of members of the blue collar workforce into middle management positions over the years and the heavy Western European influence on the organisation makes it very masculine with a strong focus on maintaining bottom line, steadily increasing profits, and growing ambitions to become number one globally.

Uncertainty Avoidance

The focus of this looks at those societies and cultures that are content to deal with the occurrence of unknown and unusual conditions (that is those with a low uncertainty index) as opposed to those that avoid any uncertainty and ambiguity by having laws, rules and regulations (that is those with a high uncertainty avoidance index). The culture of the organisation is heavily influenced by the European Head Office and its seeming avoidance for any ambiguity or uncertainty. There were many existing rules and regulations already in place and with the advent of SOP (Standard Operating Procedures) these are now further providing a very high uncertainty avoidance index.

Long-Term Orientation vs. Short-Term Orientation

This suggests there is a difference between those organisations and cultures that look more towards the future and plan accordingly with focus on savings, adaptation and perseverance in contrast to those that are focused on achieving quick results and concern with social standing and face. There is a degree of uncertainty on whether the items are long or short-term. The organisation is very much focused on getting the job done today as the business model is about delivery in short time-frames hence seeming to be short-term. Yet, in saying this it is important to highlight that there is a strategic plan that looks at adaptation and perseverance to ensure the organisation continues through hardship such as global financial crises and economic downturns, seeming to also make it long-term possibly at a more Senior Management and Executive level.

Having conducted the Content Analysis Stage 1 Level 1 which was a study of the module materials and texts and then layering this over the Content Analysis Stage 1 Level 2 which was a review of the items from Stage 1 through the lens of Hofstede's 5 cultural dimensions we are able to progress to the Insider/Outsider stage and to begin drawing out responses and feedback from our trainers.

Insider – Outsider Stage 1

This stage involved observing and interviewing the stakeholders which in this case were the English-speaking regional trainer and Spanish-speaking regional trainer who were responsible for training the European Country Trainers on the module and course. The process adopted was simple as the study was seen as a template for the use of future practitioners to improve their practice. An observation was conducted by each regional trainer of their counterpart and this was followed up with a semi-structured discussion to clarify observations made and also ask further questions. Both observation and discussion used data that was drawn out of the content analysis stage. Refer to Appendix D for the questionnaire template. The following is a summary of what was identified and reviewed.

Observations

Observations were made of the regional trainer group who were responsible for training over thirty five country trainers across the European region. Several sessions were held with some modules being taught to all countries at the same time and others being taught separately. The Basic Operations module was taught separately by the English-speaking regional trainer to all countries (except Spain) and then in a separate session by the Spanish-speaking regional trainer to the Spanish country trainers. This allowed both regional trainers to observe the other in practice and take notes for the course as per normal business practice and similarly for the research. The following provides a brief analysis of both observations taken from Observation Sheets (refer Appendix C).

Pre-Cursor: Both regional trainers were well prepared for the events that were about to occur and had completed all administration and pre-course requirements. Materials, workshop activities and all module requirements were ready and set to go prior to the sessions with no delays or further preparation being required.

General Opening: The opening of both sessions was smooth and ran to plan with no problems or issues as they were both sufficient in explaining objectives, what was to occur and also what was required from participants. In the Spanish regional trainers case there were ten people in attendance for the session which made the group easier to train and control. The English-speaking trainer's session consisted of twenty five people which though larger was still manageable.

In both cases the reaction by the participants (being the country trainer) to the sessions was positive except when covering SOP (Standard Operating Procedures) where people were more apprehensive. This apprehension was more-so in the English-speaking group where participants responses ranged from "*tell me more*" to "*sounds like we already do this*". In both cases though there was an acknowledgement that if not all people may be doing it correctly then there is no harm in teaching it as a requirement for all to follow.

Research Points: The two groups were consistent on many areas but were also quite different in a few areas as the discussion below indicates.

Within both Spanish- and English-speaking country trainer groups there was a definite positive response to most items from the Key Concepts, Relationships, Networks, Ideas and Themes. The items which were not as well received by the country trainer groups were the more organisational orientated ones of Resourcing, SOP (Standard Operating Procedures) and Operations devices, as reaction to these three differed somewhat. Within the Spanish group country trainers felt that SOP, Resourcing and the Operations devices were concepts that would be better understood and more likely used by International Branches and that Domestic Branches would not fully understand or grasp these ideas as their systems, adaptability and processes were very different to those of International Branches. Within the English-speaking group there was agreement by many country trainers that there would be difficulty in understanding these three components within their Domestic Branches but also many, if not most, International Branches would also experience difficulty in understanding and meeting their requirements.

There was no noticeable difference between the regional trainers who taught the module as both paced the module in a very similar manner and also provided adequate space and time for the country trainers to digest and then raise questions. The main difference again came in the types of questions asked. The Spanish country trainer group were more interested in when they could start rolling out the training in their countries and if they could obtain materials quickly so as to begin modifying them to better suit their local needs. When asked as to what it was that they wanted to modify, the response was in terms of the module being useful but not fully fit for use with their Domestic Branches. The questions raised by the English-speaking country trainer group was more along the lines of what could be changed by the country trainers to suit their own needs and also what resources could be provided to assist with training in some countries. A further question was asked by the English-speaking group as to the need for required changes for certain groups with the response similar to the Spanish group in that there needed

to be changes for Domestic Branches. However, there was also a response from the English-speaking country trainers that in many International Branches there was a low level of general education and that as a consequence the concepts and relationships would need to be broken down even further for greater elaboration, explanation and understanding. The question was again raised as to why this was necessary and in some cases there was no response, yet later in one-on-one situations (between regional and some English speaking country trainers) it emerged that education levels were not always as they should be and that several supervisors and managers could have trouble understanding the module as it currently stood.

Overall there was no resistance to the content except that both Spanish and English-speaking country trainer groups regularly highlighted the big issue that they face is that they are regularly being asked to do more with less and that this programme was an example of a good idea that had potential to fall short of its objectives if not resourced adequately.

Cultural Effects: There are definite organisational cultural behaviours that are embedded across both Spanish and English-speaking country trainer groups such as the high level of Masculinity, Collectivism and Short-Term Orientation held across the country branches. The discussion below is focussed on the remainder of Hofstede's cultural dimensions and how these have been identified by the country trainer groups. As not all Hofstede's dimensions arose as issues for discussion, only those that did are discussed.

Power Distance - This was definitely low amongst the Spanish group as they felt they were more equal with their organisational seniors and thus able to make decisions in the class-room rather than seeking approval. The English-speaking group was more hierarchical at least in decision-making and as a result had a higher Power Distance rating as in many cases they *parked* issues for which they felt they required higher level consultation.

Uncertainty Avoidance - Though the culture of the company is very much about minimising uncertainty there was a definite difference between the approaches on this by the Spanish as opposed to the English-speaking group. The Spanish group were much more relaxed and comfortable knowing that though not all matters were comprehensively resolved at the time of training the module, they would somehow make things work out at the local levels. The English-speaking group on the other hand are more focussed on having a comprehensive solution now to be able to move ahead with full and complete certainty so that they could indeed teach the module and implement the policy as written.

Other issues that arose which were different between the Spanish and English-speaking country trainer groups were:

The Spanish group needed to translate all materials to their national language. The Spanish group needed to consider rewording some terms such as *resourcing*, *devices* and other terms used in the course to terms that would be easily and more quickly grasped by their country colleagues.

Both the Spanish and English groups were again consistent in their approach to needing to modify the module (and course) for their Domestic colleagues who were vastly different in culture to their International counterparts. (This difference is mainly due to the fact that training materials at a Domestic level tends to be designed for a locally educated workforce who may only read and speak the local language compared to the training materials at an International level which can assume a more global education level of workers who are multilingual.)

The English-speaking group were more hesitant in terms of committing to rollout and training the module whereas the Spanish group were able to at least partly commit with what little resources they had and to advise what next steps they planned to take. (This difference will be discussed in more detail later, suffice to say that for now that the hesitation is often due to the English-speaking group's requirement to consult with higher management on issues such as resourcing etc.)

Observations Summary: The events for both groups can best be summarised with the statement that there were more similarities between the two groups than there were differences. This can be largely explained by the pervasive nature of the company's culture and that the regional trainers and majority of country trainers in both groups had been with the company for five or more years and had been well versed into the company's expectations and requirements. What was vastly different was the more relaxed nature of the Spanish regional trainer's relationship with the Spanish country trainer group and the more moderate approach taken by the English-speaking regional trainer with the English-speaking country trainer group and how this had been an expectation by both and reciprocated in style by both. There is almost an unsaid informal understanding that the Spanish group would take the module (indeed the total course) and modify it quite substantially to ensure it is adopted by their colleagues yet somehow keeping the core module messages. It was almost a "*leave it to us and we will get the message across in our way*". Whether this is the actual case or not is not something that this study is charged to enter into, suffice to say that historically this appears to be the case.

Interviews and Discussions

Interviews and discussions were conducted with the regional and country trainer groups when the regional trainers were running the train the trainer module training sessions. The module was taught separately by the English-speaking regional trainer to the countries whose trainers spoke and understood English and then in a separate session by the Spanish regional trainer to the Spanish-speaking trainers. This allowed both regional trainers to first observe and then interview the other regional trainer in practice whilst also taking comments and recording discussions from the country trainers along with notes for the module (which is done as part of normal day-to-day business practice) and also for the research. The following provides a brief analysis of interviews and discussions as taken from Questionnaire/Focus Group Questions Sheet (refer to Appendix D) with the regional trainers. The regional trainers incorporated in their responses any noteworthy highlights from the discussions with their respective country trainer groups and similarly any further relevant observations gained were also included.

Interview Questionnaire Synopsis: There is a stark difference on initial interpretation of the Course and Module between how the Spanish-speaking regional trainer viewed the course and how the English-speaking regional trainer viewed the course. Both trainers saw the course as being a good idea but the Spanish regional trainer saw the Basic Operations module being too detailed and with too much information covering almost ninety slides. The English-speaking regional trainer felt that the module though lengthy provided the correct foundation for the course. Both trainers were in agreement that there was a potentially better way to deliver the information rather than a multi powerpoint approach with almost ninety slides.

The module objectives were easily understood by the regional trainers and were agreed upon as sound, valid and required by all. Looking at what terms made most sense there was strong agreement that the Key Concepts of People, Cost and Quality were good items that were well placed and explained within the module as well as needing to be used by participants more often when making decisions.

The terms that did not make as much sense to both regional trainers included Operations devices as this seemed to be a possible way of confusing people by encompassing every systems tool, process and more. Similarly the term and idea of Resourcing though explained through the module was confusing to the Spanish trainer and was not fully clear to the English-speaking trainer. Within the module there were other items that each individual regional trainer did not understand, but yet the other trainer did understand which are listed in the below table:

Table 4 – Trainer Uncertainty

Spanish Trainer Uncertainty	English-speaking Trainer Uncertainty
Area of Control	Product Moving Guide
BDP (Best Developing Practice)	Client Implants
SOP (Standard Operating Procedures)	Corporate Street-map to Your Facility
Gap Analysis Worksheet	

The Spanish trainer felt that most of the module would work in a Spanish setting at a local and national level as much of the module's content is already taught in other courses. However, other parts of the module would not work and would require further resourcing to establish, develop and maintain such as the SOP (Standard Operating Procedures). When questioned on the adoption of SOP if these resources were provided then the response was that the module would be definitely adopted except for:

- The Operations devices – too confusing at this stage;
- Resourcing – again requires further resources but also more detailed explanation and more time to adapt; and
- Corporate Street-map – already occurs.

Similarly the Spanish-speaking trainer saw BDP (Best Developing Practice) and their associated forms as being confusing and not being locally adopted. In discussions with his country trainers he identified that Spanish locations adopt organisational processes such as SOP, yet they also each have their own BDP which they use but in most cases they have no time to fill in forms and request changes as the culture is to *just do it*. The Spanish-speaking trainer also advised Domestic locations would need an expanded module, more time and would definitely need to have many areas of the module modified to suit their domestic environment.

The English-speaking trainer felt that most of the module would work within an English-speaking setting at a local and national level because much of the module's content is already covered elsewhere and occurring in practice. In discussions with his country trainers he identified that many parts of the module require extra time and effort using existing resources and/or extra resourcing to establish, develop and maintain the newer items such as SOP (Standard Operating Procedures). The English-speaking trainer felt that in most cases the English-speaking locations would adopt these with minimal resistance or push back to management for further resources. Why this is the case is further elaborated upon in other sections of this chapter. Suffice to say that outside of any resourcing issues both regional and

country trainer discussions converged to agree that the module would be largely adopted except for:

- The Operations devices – too confusing at this stage;
- Corporate Street-map – again this looked like a name for something already happening;
- Product Moving Guide – too confusing at this stage; and
- Decisions – again this looked cosmetically appealing but in one instance it already happens and in another there is little that can be done to make changes to existing decisions that have been made at higher levels (such as scheduled deadline times, machinery and equipment).

The English-speaking trainer also felt that Domestic locations would probably require an expanded module, more time and would definitely need many areas of the module to be modified to suit their domestic environment.

Both regional trainers agreed that if they were required to train this at lower levels of the organisation they would:

- reduce the number of slides;
- make the module more locally relevant (by breaking it down to national and again down to more local levels);
- make the module interactive with more participant involvement;
- focus on facilitation rather than the lecture style; and
- break the class into smaller groups to enhance the physical comfort of participants and create greater opportunity for participants to more freely respond in a smaller and safer group.

The regional trainers unanimously agreed to reduce the complexity of the Operations devices and to alter the content in respect of the items that were previously discussed as being unlikely to work in their respective settings.

In terms of the level of consultation and involvement that the regional trainers would have in the establishment and development of such a course and module, the English-speaking trainer advised that in most cases he would be called upon to participate in the pilot of the course and the Spanish trainer advised that he would often not be included. There was agreement between the two regional trainers that

this call for one trainer over the other is due to the corporation often (not always) drawing upon English speakers in seeking input for a review of training materials.

Both regional trainers though advised that at a local level when they were country trainers, there would be no involvement, except that they would be given the module in a final format to run. It would then be at this stage they would modify the course to suit national and local requirements. In their new capacity, though, the regional trainers advised that involvement had only changed in that they receive the course and module earlier and can adjust it in advance to an extent so that it has a greater ability to be accepted by all. However, their ability to localise is reduced because their directive in many cases is that the course must go out as close to the original content and training format.

The Spanish trainer advised that the cultural issues of presenting a module such as this in a 100% original version was risky as the course was very corporate looking, very anglo-termed and needed breaking down and grounding at a local level otherwise it would be ignored and the reputation of the module's planned initiatives such as SOP (Standard Operating Procedures) and more would be damaged. Both Spanish regional and country trainers agreed that in a Spanish setting, the need for localising (meaning to encompass making the module suit local conditions whilst also making it more acceptable to in this case the Spanish social behaviour and cultural beliefs) much of the content and format is paramount to success.

The English-speaking regional and country trainers also agreed that the module needed to be localised (localised in this sense to encompass more of a middle management speak) to reduce the amount of *corporate speak* which the audience could misunderstand and hence ignore. However, on the whole, the cultural issues would be largely from an internal corporate perspective as the course had been written by an English-speaking person.

The course directive to train in a particular way saw both regional trainers agree that the course provided little to no professional development to them as trainers

in terms of knowledge, skills or competencies as the course was written in a lecture format relying on minor interaction and use of training/facilitation skills.

In terms of other comments the English-speaking trainer felt that the course was a great idea with many good concepts. However, the execution of the training was not as well designed in terms of the use of lecture being the predominant mode of instruction. The English-speaking trainer also thought that culturally there were gaps from corporate to national, national to local, international to domestic and from country to country. The English-speaking trainer thought that there was no magic formula for covering such variation except to rely upon the company cultural setting – which the module/course developers very cleverly looked to have done - which has some currency across all levels of the corporation (and of course to adopt in the future the recommendations that his study would produce).

The Spanish-speaking trainer comments were that the course/module needs to move away from the lecture mode and become more interactive with the audience. The major comment made was that the course seems to have been developed by English speakers, piloted by English speakers to English speakers and then rolled out as an English-speaking programme for countries to translate, decipher and perform, usually in a short time frame and in a similar manner to the English-speaking countries roll-out. When this situation is reviewed, there appears to be a need for more involvement by non-English speakers at all points in the module's development. This would potentially not only improve the course/module but ensure its ability to attain greater acceptance and ongoing traction in the workplace.

Content Analysis Stage 2 (A Second Review)

To this point we have been able to determine from both the content analysis and Insider/Outsider stages that there was a set of items which can be revisited within the course materials and texts to clarify, confirm and find deeper meaning. To demonstrate this in a manner that clarifies such items, and which also provides a template guide for practitioners who may choose to adopt a similar approach in their own reflective practice, the following table (Table 5 - Content Analysis Stage 2) highlights this process.

Table 5 – Content Analysis Stage 2

Item Identification	Content Analysis Stage 1 – Levels 1 & 2								Insider Outsider Stage 1			
	KWIC	Cat	Value & Code	Hofstede Cult. Dimension					Observations		Interviews	
				PD	IC	MF	UA	O	Sp	En	Sp	En
Key Concepts									YD	YDIE	YD	YD
o People	14	O&L	3	L	HC	M	H	S	YD	YDIE	YD	YD
o Quality	14	O	2	L	HC	M	H	S	YD	YDIE	YD	YD
o Cost	15	O&L	3	L	HC	M	H	S	YD	YDIE	YD	YD
o SOP (Standard Operating Procedures)	54	O	1	H	HC	M	H	S&LG	YD	YDIE	YD	YD
Relationships												
o Role of a Branch Manager	19	L	5	L	HC	M	H	S	YD	YDIE	YD	YD
o Managing	57	O & L	3	L	HC	M	H	S	YD	YDIE	YD	YD
o Operations devices	19	O	1	H	HC	M	H	S	YD	YDIE	YD	YD
Networks												
o People and resources	5	L	4	L	HC	M	H	S	N	N	N	N
o Company Systems – Inputs & Outputs	33	O	2	L	HC	M	H	S&LG	N	N	N	N
Ideas												
o Lead & Direct main activities – Outgoing/Incoming	19	L	4	L	HC	M	H	S	N	N	N	N
o Intelligent, balanced decisions	8	O	2	L	HC	M	H	S	N	N	N	N
o Resourcing capacity to increase output	5	O	2	L	HC	M	H	S	YD	YDIE	YD	YD
Themes												
o SOP (Standard Operating Procedures) – Service Improvement, Cost Reduction, Revenue Enhancement	52	O	1	H	HC	M	H	S&LG	YD	YDIE	YD	YD
o SOP – Process, Tools, Environment, People	35	O	1	H	HC	M	H	S&LG	YD	YDIE	YD	YD
Other Issues/Concerns/Notes from Content Analysis Stage 1 and Insider Outsider Stage 1									L-PD L-HC HC Masc. S-O	H-PD H-UA HC Masc. SO	Area BDP Gap not clear	PMG Client. Imp Corp Map Decision not clear

LEGEND

KWIC - Key Word in Context – The frequency of the word in the module

Category – O=Organisational, L = Local

Significance Value & Code - 1= very organisational, 2 = moderately organisational, 3= organisational and local, 4 = moderately local and 5= very local.

Hofstede – PD=Power Distance, IC=Individualism vs Collectivism, MF = Masculinity vs Femininity, UA=Uncertainty Avoidance, O=Orientation Long Term vs Short Term

– L=Low, H=High, HC=High Collectivism, M = Masculine, S=Short Term, LG=Long Term, Sp=Spanish, En=English

Observations & Interviews - Y= Yes Concern, N= No Concern, D=Domestic, I=International, E=Education

The table highlights that the previous Content Analysis Stage 1 identified items under Key Concepts, Relationships and Themes as being culturally poignant to both the Spanish and English-speaking group. The Network items seemed to be of little to no importance to both groups whilst the only item at issue from the Ideas cluster was the Resourcing item.

There were also new items which arose out of the initial stages that were of separate concern to each group and these were used to conduct a further analysis of the text and revealed the following.

The Spanish group found several new items of interest as discussed below:

Area of Control

This was in relation to the role of the Lead (lead in this instance is a leading hand which is a role just below a supervisor) positions within the branch and what the role could authorise and manage, which the Spanish group found confusing from the perspective that this is done by many people as in many cases there is no officially established Lead person. However, the job still got done. The text provides no real elaboration on variation or situational aspects to this item causing confusion and the question of whether every country gets *Leads* and Spain does not. To which the answer given that in all countries some bigger branches have *Leads* whilst most others have a *Supervisor* or some other existing staff member complete the task as required. This response reassured the Spanish group there was equal treatment and standards to determine this. While this confusion occurred only once within the module, it was sufficient to again demonstrate how items within a corporate culture can differ greatly at different levels or in different locations. The concept of *area of control* was also found to be an anglo term which again required defining and explanation before it was understood within the Spanish group.

Best Developing Practice (BDP) Forms

This was again a confusing point for the Spanish group who appreciated the idea but felt it added a complexity to the process. The argument of complexity is that

each branch is different and though they all follow the same processes, often a BDP for one location would not be suitable for another. Hence as each location has their own BDP there is no time and resources within the branch to document the BDP. The feeling was that this should be done by a corporate resource that can view each branches own BDPs and then judge what is micro, macro and applicable to others. There is almost a “*do not waste our time as we are already short on time, resources and budget*” point of view coming through. Again looking at the text and analysing the item in context it is again an example of the central organisation using a corporate jargon and a process that holds no value at another cultural level within the organisation. A persuasive argument is presented that those with their hands on the actual process are best situated to judge BDPs but there is an equally valid counter-point that those who have their hands on the process need to understand the corporate jargon so there can be a common understanding of what is being asked of them and then to determine what assistance, resourcing and time they may need to be able to do this. This is an example of how corporate culture miscommunication between levels within the organisation can occur sometimes. Additionally the process of BDPs similarly is a very anglo concept, which the Spanish group while not ignorant of the concept feels that the BDP concept does not culturally seem to fully fit.

SOP(Standard Operating Procedures) Gap Analysis Worksheet

This item appears to be missing in terms of any discussion or explanation in regards to defining what it can do within the module. To be able to analyse the item there needs to be at least a further detailed definition and in this case there is no comprehensive explanation provided.

The English-speaking group found several new items at issue as discussed below:

Product Moving Guide

This was an item which the English-speaking group understood but found confusing in terms of the level of detail that it was presented within the module. It is also something that appears to occur naturally at a national and local level but while this item may be useful at higher levels, it may be too technical and detailed

for lower levels. From a content analysis perspective this again seems to be another example of applying *corporate speak* to an area that the intended audience at a national and local level already performs.

Corporate Street-Map

This was identified as something that was possibly superfluous to the module as it is a naturally occurring phenomenon powered by the fact that most organisations run top to bottom and re-inforced the Power Distance factor as there is less traction when the street-map is reversed. Therefore, as an item it confuses and possibly diminishes the effect of the module. This is another example of *corporate speak* which may in some cases be placed within the module, to merely help create a wanted power distance.

Client Implants

This item was missing in terms of any detailed discussion or explanation in regards to defining what it is and what further use it provides within the module. To be able to analyse the item there needs to be a more detailed definition and in this case there is no comprehensive explanation provided.

There is much value in regards to this second stage content analysis as there were further questions that emerged not only for the new items above but also regarding the existing items that were previously identified as of concern (namely Key Concepts, Relationships and Themes). This second stage content analysis objective was not designed to recount every item in detail but more to analyse the content in view of what had gone before, highlight the existing items (which are of concern), and detail the new items that arose out of the earlier stages whilst setting these in the context of a re-review of the module under a new spotlight. In short, it was to filter and identify items that were noteworthy from the first two stages and then re-examine them again in context of the module. The next stage being the Insider Outsider Stage 2 drew on some of the issues which had been already identified as discussed in this section, to consolidate new and existing meanings and possibly to raise some new items of further interest.

Insider Outsider Stage 2 (A Second Review)

This final stage provides a setting to review what has been already covered but in this case it is a final interview/discussion with both regional and country trainers to check and clarify final meanings whilst reviewing possible changes and improvements.

Through interviews and discussions during the train the trainer process with the Spanish group (regional and country trainers) in regards to the module the following was also discussed.

The repositioning of relevant items from the initial first two stages of Content Analysis and Insider Outsider was imperative to ensuring that the course is successfully run.

Example: Setting up the Operations devices so that it is not a panacea for all problems but more so that it is positioned with the most important tools to solve some problems.

The identification of new items which are less relevant thereby creating further confusion and less chance of acceptance of the relevant materials.

Example: BDP (Best Developing Practice) forms are a good second step but at this initial stage placing it into the module is potentially just pushing the retention stage as the audience are possibly already overwhelmed with new information and again it may be more suited to and better performed by a corporate resource who better understands its objectives.

The re-setting of the course from its current format into the Domestic setting is definitely a requirement moving forward as there are many existing items and processes which will hold little meaning and value for the domestic audience.

Finally, the course needs to be translated and reset for the Spanish International audience in a way that they will understand the objectives and learn the content.

This will mean not just rephrasing the content but also understanding the underlying anglo origin items such as *area of control* and customising it for the Spanish audience.

Through interviews and discussions during the train the trainer process with the English-speaking group (regional and country trainers) in regards to the module the following was also discussed.

Similar to the Spanish group the repositioning of items like the Operations devices also needed to be addressed for this group. The identification of new items seems to be less relevant to the task at hand and therefore possibly creates further confusion with and less digestion of the relevant materials.

Example: Product Moving Guide is of little consequence and interest and again a potential overload of concepts. Similar to the Spanish group the question arises of what is important as opposed to what is *nice to have*.

The resetting of the course from its current format into a more Domestic setting is definitely a requirement to moving forward, as there are many items and processes in the module which will potentially hold little meaning and value for the English-speaking domestic audience. Finally, as the general education level of the English-speaking audience (being the staff in the various operational facilities) in some cases was not always adequate, there were suggestions that the module needed to be broken down into more basic sub-modules.

The issue of whether certain items in some cases have been included to create a power distance relationship and maintain the line that delineates corporate life and branch life is relevant. This thought presented itself to the researcher with the item Corporate Street Map as there is a clear delineation of roles and levels in a top down structure from corporate to branch. The Product Moving Guide provides a similar demarcation of process but in this case it is the hands on processes, which are emphasised with corporate leaving the audience to again be assigned the tasks set by senior levels. The view was expressed that while this may not be clearly

identified, it may in some cases sub-consciously create a divide between the corporate and the national/local, which could possibly be contrary to the objectives of the course in developing and fostering unity between entities working together for the growth of the company.

Discussion of Findings

The following provides a discussion of the findings in terms of past concepts such as elements, hunches, and research question and also draws out any potential other findings that were identified. The aim of revisiting these is to refresh our memories but more importantly to now view these in light of the findings.

The Elements

The main elements previously discussed were:

- Post Colonialism
- Globalization
- Intercultural concepts
- Corporate Education
- Third Space

When we look at each now in light of the findings the following patterns emerge.

Post Colonialism

There is a potential colonialist practice in place. The course/module has been put together predominantly by English-speaking developers. The course/module is run predominantly in a traditional English school lecturing mode. The course/module is largely presented by English-speaking trainers who also advise that the course should be conducted at national locations following the same format. The small amount of involvement by non-English speakers at any of these levels is indication of a potential colonialist approach to training. The adoption of the course and then the adaptation of it by most non-English-speaking countries to suit their own country and culture provides a post colonial lens, which demonstrates the potential misunderstanding or appreciation of cultural pluralism by the corporation. The Spanish regional trainer explains that in many cases the corporate module is taken and almost completely changed, while still maintaining the key corporate messages

which are improved with national and local content. Therefore, it is easy to see that this post colonialist lens widens even further as most countries develop and evolve the module so that it is enriched and enhanced with local content and local items, which make learning quicker, richer and often producing better outcomes.

Globalization

In regards to the module, research and findings to date it becomes clear that the course/module is an example of education developed centrally and then rolled out globally. The course/module in this case was originally developed for the Asia-Pacific region and has since been rolled out across Europe and the Americas. With the objectives being the same globally for the module it appears that the one size fits all approach to training may in some cases demonstrate the organisation's attempts to achieve standardisation of corporate education across the globe. The globalized approach is possibly further intensified by the way in which the training managers from various regional countries are educated into the course in the belief they will take it away and train it verbatim in their countries which is not necessarily always the case.

Intercultural Concepts

The previous sections of this research have already discussed the adoption of Hofstede's (2005) five cultural dimensions as a lens through which to view the module. It is important to note that the main area here for the module was Power Distance which appears to have been distinctively high amongst the English-speaking group yet much lower for the Spanish-speaking group, which again may be a demonstration of a post colonialist reaction.

Corporate Education

There is a shortfall of any evidence of dialectical practice within the course/module, resulting in a reduced focus. This focus permeates the module's content and provides little room for any perspective other than that of a corporate view.

Third/Other Space

Throughout the research process it became apparent that the national/local trainers were adopting the course and then modifying it to suit their own needs within a third/other space. This third space was attained by keeping the module objectives whilst adopting local content and approaches to achieve the transmission of knowledge that is not predominantly corporate or local but a blend of both that best suits the learner and the local circumstances.

The Hunches

It is important to revisit the study's original hunches in light of recent discussions:

Corporate Education may be able to fast track learning by working with employees/learners culture and identity.

and

By doing this corporations may also be able to transfer this learning to other areas such as process improvement.

When reviewing the findings it becomes clear that these hunches seem to be supported at least in the first part because the findings show that country trainers adopt a third space to develop what is possibly a more viable local educational exercise. By corporations becoming aware of this third space and working with it there is an obvious advantage that can be gained in not only increasing speed of training to market but also deciphering content quicker, improving development through multiple perspectives and adopting BDPs (Best Developing Practices) from different spaces. The hunches are well supported as we see how the Spanish group adopted the module and then modify it to suit their local and cultural needs while still maintaining the module's overall corporate objectives.

The Research Question

The main research question asks:

What is the influence of intercultural factors in corporate education?

When reviewing the research question from the point of view of the study's findings it starts to become clear that the factors that detract from, to some extent, also enhance learning.

Example: The original module developed, documented and taught from an anglo perspective detracts from its effectiveness within a non-Anglo setting. However, when this module is adopted/adapted and translated by the Spanish group there is maintenance of corporate objectives but also a modification, an *un-anglo-sizing* and an evolution of the module that makes the course more effective by the inclusion of national and local content and identity. This initial detraction prompts an enhancement with the localisation of the module (within a third/other space). By taking the module into this third/other space it grows and goes beyond its initial content whilst still maintaining its core objectives.

It becomes clear that the absence of culturally conducive materials provided by corporate to non English-speaking groups allows non-English-speaking countries to adopt a *carte blanche* approach to the module providing that the modules general objectives are met. This could be seen as a possible oversight by the developers of the module, but in effect turns out to be one of the strengths of the process as it allows for a greater degree of freedom for each non-English-speaking country to take licence modifying content to ensure the module's message gets across locally.

The research findings point to the conclusion that there are definite detractors and enhancers to learning within most corporate education programmes. What was not so clear is that these detractors in most cases can also prompt a local reaction that enhances the learning if dealt with in a thoughtful manner. They can provide a greater development of the module, which enhances and goes beyond just delivering the original module content. The module is transformed so that the

desired original corporate objectives are not only met but more important national and local content that supports and enhances the module's intent is also included.

Other Findings

This section is a review of other notable findings identified through the study.

At the outset of his research the researcher did not predict the onset of the global financial crisis from 2008 onwards that would have such a crippling effect on his research attempts. The downturn in economies globally saw the researcher's study take on a changed direction and new form to be able to accommodate the changed situation while still meeting the needs of the stakeholders and participants.

In terms of procedure, the researcher had not expected the amount of work involved nor that it would need to be so thoroughly explained and detailed. In developing a template guide for use by practitioners. The realisation that every step needed to be tracked and explained became more apparent for the researcher's own work and also in order to allow other practitioners to follow.

A procedure that the researcher did not expect such value from was the procedure of mapping relationships. However, these provided a most constructive image of how some items inter-relate and others are dissimilar. This became evident in the researcher's *Coding and Mapping Relationships* diagram where the researcher was able to physically see all items within a sound framework.

The researcher did not foresee the power of Hofstede's cultural dimensions across a course module in terms of providing simple easy-to-follow cases and examples from which to analyse items and similarly relate them to cultural issues. This not only provided a greater level of analysis but also helped in providing a set of criteria for practitioners to analyse and review their own course modules.

The finding that demonstrated that some English-speaking countries required further assistance with general levels of education was also not foreseen.

This meant that English-speaking countries often also needed to alter the module in a way that could break the module down further into more manageable and digestible units so it would be easier to explain locally.

During the Insider Outsider Stage 1 interview the new items identified by the Spanish group as unclear, being Area of Control, BDP (Best Developing Practices) and SOP (Standard Operating Procedures) Gap Analysis Sheet were unexpected. Later, upon further analysis and interviews/discussions, it became apparent (and also made sense from a Spanish perspective) that these were unclear to the country trainers for various reasons such as some items being completely new and not adequately explained.

Similarly the items identified by the English-speaking group as unclear - Product Moving Guide, Client Implants and Corporate Street Map - were not expected to be identified. However again, through the interview process and discussions, it became apparent as to why these were unclear, as similar to the Spanish group, some were completely new and not adequately explained.

The Content Analysis Stage 2 Table provided a clear picture of the status of items identified in terms of Content Analysis Stage 1 and Insider Outsider Stage 1. Again, mapping this through a table was initially an apprehensive move on the researcher's part but after completing the table it allowed the researcher to review data in context with other data and also code, rank and group data accordingly which was not anticipated to be as clear and helpful a guide as it eventuated.

Possibly one of the most unexpected findings was the placing of the Corporate Street Map into the module, as it initially seemed to serve little purpose, however after prolonged analysing it became apparent that corporate had possibly placed this in to heighten the Power Distance between itself and the national/local branches. What use this serves is beyond the researcher's understanding, however this could possibly be an approach in some cases by corporate to distance itself from the hands on work thereby providing local levels with a sense of autonomy. All other findings were either fully or partly expected.

Chapter Summary – A Summary of What was Found

The objective of this chapter was to present the findings, however some summarising of conclusive comments need to be made.

- The findings indicate that Third Space is a valid location where learners negotiate their learning, attain knowledge and come to understand module objectives.
- The findings indicate that the hypotheses of working with the learner's identity and culture definitely increases and improves the intake of information and speed of learning whilst also enhancing the value of the content itself.
- The findings indicate that certain factors such as anglo terms detract from the module whilst others, such as maintaining the workplace culture into the thread of the course, facilitate, assist and enhance the module.
- In light of the above it can be stated that the research question can be said to be validated in that:

Intercultural factors do affect learning in corporate technical leadership education programmes.

Having shown that there is a definite link between the effectiveness of corporate educational programmes and intercultural factors, the next chapter will now take the findings of this chapter and use them to draw some conclusions, suggest some implications and propose some recommendations.

5 – Conclusions, Implications, Recommendations

Objective of this Chapter

In this chapter the conclusions that can be drawn based on the study's findings will be presented. Alternative explanations for some of the findings will also be provided. An explication of the new observations, interpretations, and insights that have emerged from the study will also be made. The limitations of the findings will be discussed, whilst the impact of the study will be reviewed. The study will be reviewed in terms of the broader implications of the research covering aspects such as professional practice, theory building and more. Finally, a range of recommendations for further research, changes in research methodology and refinement of concepts, knowledge and practice will also be set out. In stating these, the study again hopes to provide a guide and template for other practitioners and researchers to follow.

Conclusions

The findings presented in the previous chapter provide the basis for the conclusions which follow. The conclusions that have been drawn are not exhaustive, and in no way does this mean that what will be discussed is definitive and final. What is sought is at best to provide a review of inferences that can be made based on the findings to draw this study to a close and to provide a platform that practitioners and researchers can further review, build upon or at least use – whether as an advocate or a critic – to widen dialogue about the possibilities of a different more effective approach to corporate education.

Conclusions to be drawn based on the findings

The findings suggested that many paths could be explored, however, the more important ones are those, which may possibly be obvious, yet need to be stated, so that the reader is clear on the study's outcomes and the ways in which the study can be used as a guide for future fellow researchers and practitioners. Considering this the following conclusions – arising from the findings - can be stated.

- Third Space – The Third Space, being that place where the organisation's programme curriculum meshes with the learner's identity and culture, is the ideal location within which trainees should work and learn.
- Learners Identity - Working with learner's identity and within the learner's culture is one of the better approaches for education at both the participant and facilitator level.
- Non-Related Cultural Specific Terms - Using anglo-terms, which non-English-speaking cultures do not fully comprehend, will detract from learning and possibly disenfranchise learners using a particular course module and possibly the whole education programme.
- Blending Cultures - Blending the workplace culture (and other local cultures) into the learning process provides a more enriched environment for participants in that process.
- Study as a Guide for Practitioners – The approach adopted by this study not only provides a sounder level of evaluation of the usefulness of the curriculum's content but can also provide a template for the development and evaluation of further curricula.

It is necessary to elaborate on each of these conclusions. These are discussed below along with the findings Alternative Explanations, Limitations and Lessons Learnt.

Third Space

As an approach this is a location within practice that in many cases is rarely used by practitioners. Organisations often disregard it as a lengthy and time consuming approach. But the time taken to translate, decipher, recode, redevelop and then deploy training as is the current practice in some cases is very expensive in terms of time, human resources and financial costs. Whether organisations like it or not Third Space – as this study demonstrates – will come into play at some stage once the course is handed over for dissemination, as local stakeholders take it and modify it to meet local needs and possibly to achieve their own ends whether consistent or not with the intended corporate message. Therefore, to avoid any corruption of message - or corporate directives as the case often is – it is better to address the Third Space question upfront and to develop programmes in a way so that such corruption is minimised. The conclusion being that intelligent use of the

Third Space concept by the corporation can alleviate the current issue that occurs in some cases of corporate message corruption – whether intentional or not – due to the original corporate intent being lost in translation as local levels inherently view programmes through their local lens.

These findings are supported through other researchers such as Muller (2003) *Human Computer Interactions*. The researcher's findings are similar to Muller's work in that they both recognise how space plays an integral role in terms of innovation through participatory design. Both Muller and the researcher identify through their findings that the provision of space allows for opportunity to challenge paradigms and beliefs. This in turn provides greater opportunity for communal learning in a pluralistic environment where many opinions and ideas could be raised. The explanation of such a participatory practice in both Muller and the researcher's study demonstrates that using the concept of third/other space provides for a greater productive location fostering increased participation leading to a higher level of innovation, which in today's global marketplace can potentially make the difference for corporations going *boom* or *bust*.

Learners Identity

There seems to be little doubt that we learn best when we decipher and re-interpret messages at a level of understanding with which we are comfortable. Yet as practitioners we sometimes deliver bland corporate training in formats that adopt sterile, non-identifiable and culturally insensitive approaches. Even when an approach is taken that adopts a more realistic and/or simulated environment, it often employs the standard *western corporatised* approach, which again offers little adaptation to, and therefore comprehension for many non English-background culturally diverse participants. What is potentially needed is the adoption of a more dialectical approach at all stages of the programme development from initial inception, to analysis, design, development, implementation and evaluation. This would possibly then provide a greater array of not only approaches but also content, simulations, solutions and so on. The conclusion to be drawn from this is that practitioner and developers should consider a paradigm shift to become more

inclusive, within the development phase, of other practitioners' and stakeholders' views to enhance and improve their training product.

The researcher's findings are again well supported by the works of others such as Coll and Falsafi (2010) and their work on *Learner Identity an educational and analytical tool*, who state:

We argue that learner identity (LI) is the main mediator of participation in learning situations and as such deserves the special attention of policy makers and practitioners. It allows educational systems to address and understand participation in learning situations, and how individuals become and are learners within and across different situations..... unless learner identity is spoken out and talked about it will remain in the educational underground. The educational arenas need to develop and apply methods to bring out the LI narratives and use them as a mediating tool for the growth of individuals as learners and ultimately as participants in their cultures. (Coll and Falsafi, 2010, pp211-233)

The researcher's findings are also closely aligned to Wong (1991) and her work *When learning a second language means losing a first*, which documents how students learning English often do not just lose their mother tongue but also some of the cultural elements associated with their mother tongue. Both Wong and the researcher are in synch in terms of not only the impact and loss in regards to learner identity but also the issues this presents the learner and what they believe their multiple identity comprises. In short who they think they are, and the ensuing confusion and harm this can cause not only in terms of learning but also in regards to their other identities such as social, emotional and more.

Non-Related Cultural Specific Terms

Some corporate training programmes (which the researcher has encountered) adopt a single language/culture and approach thereby creating a cultural specific standard by which the course is developed and judged. As demonstrated by this study such a unilateral language approach must inherit all the cultural specific characteristics,

traits and nuances of that language and culture which to the *outsider* may create great confusion and alienation. There is no doubt that in most cases the adoption of this approach is completely un-intentional, nobody sets out for the programme to fail by excluding learning for others, who do not understand the cultural specific terms and hence much of the content. The problem remains though, whether intentional or not, that the adoption of a single language perspective will include its own non-related cultural specific terms, which as this study demonstrates can possibly detract from the programme's success. Training practitioners need to again look at alternate solutions and possibilities that could permit programmes to achieve greater success rather than being doomed to fail before launch.

This conclusion is similar to those in the findings of Benahnia (1992) and his work *The Cultural Component in EFL Textbooks Used in Morocco*. Benahnia found that in most countries, English textbooks and course materials teaching language were often not engineered or developed for the learners of those countries, as Benahnia's puts it:

The cultural components involved in those textbooks did not reflect the learner's Mother Tongue Culture (MTC). Therefore, an attempt was made to use new textbooks reflecting the local customs, linguistic usages, and cultural backgrounds in their context so as to suit the psyche of the local learners and enhance their Intercultural Competence (ICC). That includes perceptions of self, perception of others, as well as the process itself of becoming aware of the intercultural relationships in culture and identity.
(Benahnia, 1992, pg 1)

This statement from Benahnia is in essence what this study's researcher found to be crucial as a finding that he espouses all other practitioners (like Benahnia is advocating to his field's practitioners) to consider and follow when developing materials such as textbooks or course materials.

Blending Cultures

This study provides a good demonstration that though its audience is global and the programme was developed from the unilateral perspective of the English language, the blending of workplace culture into the programme's implementation provided an enriched environment for participants to learn and work within. The study was able to identify those factors that can apparently either detract from or enhance the course's effectiveness that include the ability to blend work culture into the programme. Even minor blending of the local work culture into the module's implementation can enhance a programme enough to cover off any potential shortcomings of the module and reinstate it as a more valid learning vehicle as this study evidenced. Going deeper into the culture blend there is room for much further improvement as the programme largely presents a corporate view of how things should be done. However the branch view if included in the training process is close enough to the learner to enhance credibility, relevance and association. This allows participants to feel that the module is somewhat more recognisable and therefore more workable. It is important to consider what further gains the module may have attained with a more dialectic approach involving a span wider than a head office corporate view. It is clear the wider the blend of the cultures involved the greater the rewards a learning experience can generate.

Possibly one of the more popular beliefs that support the researcher's findings can be found through the work of those who espouse the importance of understanding cultures to then be able to work with them as Brembeck below states:

To know another's language and not his culture is a very good way to make a fluent fool of one's self. (Brembeck, 1997,Pg 37)

Study as a Guide for Practitioners

The researcher's attempts to identify ways to improve practitioner and participant experience are demonstrated throughout this study. The researcher's aim of identifying factors that enhance or that detract from the effectiveness of corporate educational programmes were largely accomplished, hence the method adopted seemed to work. Whether this approach can be replicated by others and used in

their practice is yet to be determined. What can be concluded is that a deeper level of analysis and evaluation of programmes by practitioners is potentially required for improving the effectiveness of programmes and for greater corporate learning to be achieved.

There is no doubt that, in reviewing the above points, it becomes clear that each factor has a direct link to the others. To take but one case, the shortfall on learner's identity, directly links to the usage of non related cultural specific terms or similarly explains why blended cultures are only partly used and not sufficiently enough to enrich learning environments so as to create a Third Space, which appears to be more conducive to corporate learning. The conclusion that the study could provide a guide for other practitioners to use in their work points to the need for deeper and broader work to be done when evaluating programme content and process. Such an approach would extend the traditional Kirkpatrick (1994) four level evaluation model. This in itself leads on to possible alternative explanations for the study's findings which will be discussed in the next section of this document.

Alternative Explanations for the Findings

When reviewing the conclusions it became clear that, in some cases, there were other explanations as to why the findings panned out the way they did. This section will now review these alternative explanations as they provide a critical link not only to the status of the findings but also provide practitioners (who are looking to replicate the study) with those further understandings that they need to explore and better comprehend in order to improve their own practice.

In terms of findings the first of these alternate explanations is the way in which the overall culture of the company in some cases reduces cultural differences between local branches. The common and consistent work processes performed by participants in their working roles is replicated from culture to culture, language to language and country to country. The study found that this commonality is what has also strengthened the culture of the company and therefore enhances the ability for corporate education to cross over the great divides (such as language, culture and nationality) providing that education is related to aspects of this common

organisational culture. Therefore, rather than concluding practitioners at local levels are solely responsible for transforming the module for success, an alternative explanation could be that the organisation culture is also responsible notwithstanding any potential unilateral approach taken(as may be the case in some instances) and any local factors that may redirect success. The strength of this alternative explanation is a point for further exploration.

The study findings consistently demonstrated that participants at the same level, with the same titles, still saw the English speaking group seek approval whilst the Spanish speaking group were more relaxed and tended to adopt an attitude that any difficulty could be overcome. This phenomenon could provide an alternative explanation as to how a differing culture is able to adopt and adapt a programme and be more open and relaxed in its interpretation whilst the group from the same culture that authored the programme feels compelled to implement the module in a verbatim manner. This then leads to the possibility that the module could be modified, localised and run more effectively and efficiently in the non-authored cultural group compared to the rigidly staid module that has little opportunity to be altered within the original authored cultural group. This then potentially leads on to another alternative explanation regarding the possible need for Third Space.

It becomes apparent that another alternative explanation for the findings is that a Third Space has been unintentionally created by the organisation. This organisationally created Third Space, though created by the corporation through a possible unilateral side-effect, delivers a location for stakeholders to delve into and then adapt the module and its learning as they best see fit. The question then is to how much greater or better could these results have been if a dialectical approach had been taken? It could then possibly be said that the inadvertent Third Space that is created could be an alternative explanation as to the degree of success that the learning module in this study achieved.

One of the most obvious alternative explanations for this finding lies in recognising the *shadow side* of the Spanish speaking groups. The *shadow side*, though used by communication authors and experts such as Egan (1993) and Kaye (1994), is a term

often used in corporate life to describe and explain the unofficial way that things get done within organisations. This may entail in some cases internal office politics, through cutting corners, to adopting practices that the company may not always sanction, however, in some organisations this is the way workers get things done. It seems evident that the Spanish speaking groups have a definite *shadow side* approach to their adoption of the module and then the further steps of implementation and evaluation. Again this is not so easily traceable, which is why there is a greater ability to modify or curtail the module to suit one's local ends. In many cases, this is not as veiled an act as it sounds with the Spanish speaking groups merely reducing the module's *fat* content to make the message simpler, more straightforward, more easily digestible and transferrable. Could this lead to an alternative explanation as to why the course has greater ability to succeed when redeveloped in a Third Space or was it merely the ability for a second culture to cut the course down to the essence of its instructional meaning? This is a question that would be worthwhile pursuing in further studies.

A final alternative explanation for the module working to whatever degree it does could be put down to the old adage of *education through fatigue*. The module has almost ninety powerpoint slides. The approach taken to explain these slides is pure lecture mode with participants assembled in large groups sitting at group tables being told what to do by their Senior Management colleagues. Any sign of disinterest may cause embarrassment for it could be viewed as lack of knowledge or possibly being seen as confused. The length of the slides and lecture similarly drive home any message or instructions to the point where even those participants who may question the content will possibly eventually be worn down by the amount and mass of content, thus foregoing any resistance as the weight of information is too large to question. It has become simpler to just accept the content in the end, rather than analyse, evaluate and critically question it. Any measure of success that the programme may attain could in itself be a result of the fact that participants will eventually be overwhelmed and succumb to pressures whether peer, organisational, fatigue or other to adopt the doctrine of the module. This raises questions that again are left for others to further study.

Limitations of the Findings

It is important to review the limitations of the findings and to discuss these in relation to the study's aims and from the perspective of a practitioner/researcher who may wish to replicate the approach taken.

The first limitation identified is related to differences between Corporate and National levels. The course was developed at a corporate level with potentially minimal involvement from the country/national levels. The study conducted was at a level of corporate regional trainers educating national country trainers in a train the trainer format approach. Therefore, it becomes clear that the findings identified can only be applied to that level between Corporate and National, as no further deeper analysis or studies were made of further levels.

The second limitation identified in regards to the findings has to do with differences between International and Domestic spheres. Little work it seems was completed on bridging the gap for domestic audiences to comprehend the (International) programme and hence the module that was the focus of this study. This does not discount the ability for local practitioners/researchers to use the findings to conduct further research at a domestic level.

The third limitation identified in regards to the findings has to do with differences that are found from Country to Country. Though the study was a comparative one between English-speaking and Spanish-speaking groups, the findings are limited at deeper levels to only this scenario. Practitioners again should consider this when using this study as a basis for further research.

A fourth limitation is the study's findings showing the reliance on the common work culture setting, which is the linking thread that allowed the module to succeed (not notwithstanding other detractors), is a finding that may be limited to the module that was studied. This finding can in no way be for the whole course as the researcher did not conduct the depth of studies that he took with this module to any other module within the course.

Considering the above it is important to state that no study can provide a panacea for all industries or fields. Though this study is not comprehensive and its findings do provide questions which may need further exploration, it does provide practitioners with a template which may do this using a similar approach to that which was taken by the researcher with this study.

Lessons Learnt

It is important to first recognise that the study's findings from the researcher's perspective did answer the research question posed. The findings alone provided a good and satisfying result from the researcher's perspective, however, there are further lessons learnt that are important to highlight and discuss for practitioners and researchers alike. These are now discussed.

The first lesson learnt was that the smaller the group, the more manageable the research, and the deeper the analysis. Due to circumstances such as the global financial crisis the group with which the study was to be conducted had to be reduced. This does not necessarily diminish the result, as it can allow for a greater depth of analysis to occur given the extra time allowed to work with a smaller group. Which also reminds the researcher of another learning - do not give up on your research - because with disadvantages can come advantages such as the possibility of richer findings from a *thick* as opposed to a *thin* study.

Colonialism still exists across corporate training. Whilst not existing in all corporations or at all levels the unilateral approach that is generally in some cases taken demonstrates that when it comes to *the crunch* the potential mono-culture of corporations overpowers and trumps all other cultures. Corporations could possibly learn from history that there are better ways than the colonialist approach. Unfortunately, corporations in their haste to maximise profits have adopted practices, which prevent more dialectical practices and processes that could serve them better even to the extent of improving bottom line profits, remaining competitive and *alive*. The work of Banerjee and Linstead (2001) in *Globalization, multiculturalism and other fictions: Colonialism for the new millennium?*, have

been identified by the researcher to be closely aligned to his own work in identifying a new type of colonialism as they state:

We argue that, despite its celebratory rhetoric of 'one world, many peoples', notions of globalization are inextricably linked with the continued development of First World economies, creating new forms of colonial control in the so-called 'post-colonial' era. Thus, globalization becomes the new global colonialism, based on the historical structure of capitalism and is a process that executes the objectives of colonialism with greater efficiency and rationalism.

(Banerjee and Linstead, 2001, pp683-722)

Local identities are potentially further eroded due to corporate colonialism. Though pre-20th century physical colonialism may have disappeared, the continual eroding of cultures continues to extents with the corporation wiping local identity and culture through globalization and standardisation. All identities and cultures should have equal access to the educational decision making process. Whether right or wrong from a euro-centric, anglo-centric or any other centric perspective, every identity and culture has their own right to exist, be heard and be included and considered within educational settings.

The adoption of a new approach to corporate education it seems is over-due. The burgeoning global market has become more aware of its own identity across the marketplace, the existing practices for corporate education need to recognise this and work with it. Otherwise organisations can expect an employee group that is ultimately inferior and unable to provide the organisation with not only the answers to the immediate problems and issues that need to be addressed but also the constituency to develop long-term solutions and resolutions. This inability to not only create *the edge* in the marketplace but to also have the in-house knowledge to resolve the deeper long-term issues is imperative not just for corporate survival but, in some cases, industry survival.

It is important to identify other researcher's and practitioners such as the work of Pierce (2007) in her study of *New Approaches to Training*, which identified many elements that corporate training needs to consider such as a focus on better understanding the client's goals to serve them better. The researcher's own work is in sync with Pierce particularly on her concluding comments in the need to constantly look at new approaches to training:

Like life, training and learning are journeys and the end is never reached. Products and methods of operation are changing continuously. Pinched bottom lines require greater productivity from people and more efficient ways of delivering service. New and mixed generations and cultures of workers require different training and leadership tools and 20 techniques. Rapid change requires rapid learning. The race for success belongs to those organizations that can see tomorrow's horizon and prepare for it today.

(Pierce, 2007, pg19-20)

Challenging the status-quo is very difficult without top level support. The researcher throughout his research often came up against issues and roadblocks which occurred at the day to day levels of practice. Yet with the approval from higher levels of management most if not all obstructions can be removed. This is not a revelation in any sense but more a common sense approach that though not minor in any way can be forgotten and as a result potentially create issues for researchers and practitioners. A look at some of the better business practices that have developed over the years such as Six Sigma and the practices that it espouses are in line with the researcher's advice as the Six Sigma master site states:

The biggest six sigma roadblocks are lack of management support and employee resistance. Anything that forces employees to change their mode of working will in most cases be met with resistance. Management needs to use tactical ways to quell employee resistance in order to a change process for the better. ((2013) retrieved from the Six Sigma website

<http://www.sixsigmaonline.org/six-sigma-training-certification-information/articles/employee-resistance-and-lack-of-management-support-are-the-biggest-six-sigma-roadblocks.html>)

This demonstrates that gaining support from management is often one step towards ensuring a smoother path, though involving management with overcoming roadblocks such as employee objections is a greater and more effective step.

Finally, one of the greater impacts of the study in terms of what was learnt is that the approach taken by the researcher hopefully allows other researchers to replicate and use/modify it to suit their own needs. It is hoped that this will allow and encourage practitioners to attain a more relevant level of evaluation regarding their practice that not only encompasses Kirkpatrick's (1994) evaluation ethos but adds a dimension that demonstrates to corporations that greater learning can only be gained through dialectical approaches that provide for various cultural inputs.

Implications

The previous section summarising various conclusions provides a basis for this section on Implications. The implications that can be drawn from the conclusions are not exhaustive, nor is it claimed that what will be presented is definitive. What this section aims to do is to address a brief review of the implications that can be made arising from the conclusions. The implications are presented in the areas of professional practice, scholarly practice, theory development and further research.

Professional Practice

Professional practice is a more comfortable domain for the researcher to discuss implications as his background as a professional trainer gives him greater authority in this area. Therefore, the following implications listed are ones that the researcher has considered not only from the study's perspective but also from the practitioner's perspective in terms of "*is it of practical use in the real world?*".

Corporate colonialism has already been discussed in the previous sections of this and other chapters. The implications though have yet to be fully realised and even though those at a more immediate level have also been discussed (such as companies losing ground and profits) what further implications does this concept have for corporate education? Corporations potential lack of pluralism – by

adopting single corporate head office unilateralism – could possibly see a revolution taking place as participants react against the corporate imposed education and possibly all corporate ethos. This already occurs in some cases in a post colonialist way when trainers at the country level take programmes and modules and unilaterally modify them to better suit their own needs. The further implications of this is that Corporate Head Offices are possibly being seen to be less in touch with what goes on in branches, and possibly less respected for their outputs. This has similarly seen a more unauthorised practice of decentralisation take place within some corporations. The implications of this for corporate education are unfortunate because with a functional corporate training team there was at least some remote chance of attaining true corporate pluralism. With no central team there will be less real pluralism as modules are developed in isolation and opportunities for economies of scales, let alone best practice, are potentially lost. These implications are something that training practitioners need to consider and to present to their decision-makers as these implications will have lasting and possible negative effects not just on corporate education but also on the health of the organisation and possibly the welfare of its employees as a whole.

Another set of implications for professional practice and decision-making largely revolve around the concept of the third space. The realisation by corporate head office that Third Space is a best practice approach, can if handled in a non-colonialist way, provide very positive outcomes for corporate education, the corporation and all its employees. However, if the practice is adopted using what has been in some cases a colonialist unilateral approach then the eventual demise of the space will result. The implications of Third Space when used correctly are among the most promising aspects and potential strengths of corporate education for the future. Practitioners must look to providing appropriate scenarios and to giving sufficient justification if they are to successfully demonstrate the positive aspects of Third Space for corporate education which will influence and guide corporate decision-makers and other stakeholders.

It is important to point out to professional trainers, who elect to take on this model as part of their own practice, that they may demonstrate past programmes and

modules to be possibly ineffective and irrelevant. This has obvious political consequences in unearthing the inability of potentially past or existing programmes and modules to do that which they were intended to do. Similarly, it may also demonstrate the shortcomings of the training department and those who have developed these programmes and modules in the past. It is important to note that at some stage historically, the realisation that the world was not flat was the cause for change by many who had to abandon practices, out-dated maps and so on. There is a similar need by all to let go of past practices (and possibly pride) and move forward with new approaches that have benefits for all. There is a need for organisations to review those practices which may inhibit and restrict improvement within corporate education. This means that before any changes are made there must be time for a trial and error process in developing an understanding of the mechanics and circumstances that allow for models such as a successful Third Space approach to be developed and implemented.

Scholarly Field

It is important to note that the study was not principally designed for any long-term scholarly effects. The professional practice and decision-making effects were always first and foremost in the researcher's mind and intentions. It is equally important to note that as the study progressed it was realised by the researcher that the study could and should be able to be replicated by fellow practitioners. This realisation was strengthened by the fact that the more the researcher followed up and researched other scholars and practitioners, the more obvious it became that there appeared to be little to no similar method or approach that was available to practitioners/researchers to follow. Looking at the study from a scholarly perspective it appears that the degree of attention given to this area by past scholars points not only to a need to address this paucity of effort but also the possibility this study could provide a stepping stone to further work in this area.

The study provides a good example of how knowledge can be potentially fast-tracked by identifying and then working with learner's identity and culture. This has been discussed within previous chapters of this study and needs little explanation here. However, it is important to note that the identity and culture of

the learner is not limited to their present location but also includes at least the following dimensions:

- Gender
- Age
- Marital status
- Language/s spoken at home
- Household size
- Past and Present Occupations
- Current salary range
- Dietary practices
- Social, political, academic and other memberships/affiliations (as many learners may be members of groups that assist, guide and influence them)
- Race
- Religion
- Country of Origin
- Home ownership
- Education levels
- Length of time in role/company
- Location/time in past/current roles
- Family practices

It is only by recognising the impacts that these and further factors have on learners that as scholars (like practitioners) we can come to understand them as true individual learners with their own approach and attitude towards learning.

It is critical that the linking of Third Space with learner identity be examined by scholars in a way that may allow the development of a better template for learning in corporate settings. Scholars are potentially better equipped to look at the mix of Third Space with learner's identity and culture to determine what can be established as a possible best practice for learners. This could take the shape in a guide for working with particular learners on a regular basis or a template that can be prescribed for course development with particular groups of learners or other formats that assist educators. The idea is not to recreate a new one-size fits all, but to develop an approach that allows educators to reliably identify enhancers and detractors when working with particular groups of learner whether they be Madrid city supervisors through to London or Sydney city supervisors.

Theory Building for Future Researcher

There are findings that can be taken from the study that allows for various theoretical proposals to add further to those already discussed in the major findings regarding Third Space, Learner's Identity, Non Related Cultural Specific Terms

and Blending of Cultures. Several other propositions which could also be built further upon, though these are not as well developed or tested as the discussed major findings, they provide another dimension to the study which practitioners and researchers could consider when reviewing this field and are discussed below.

The greater the understanding of the audience the more chance a module and course can be developed to suit the individuals and therefore the greater chance for overall programme success. Which similarly leads to the theory that Third Space will occur to some degree whether facilitated or not, however if facilitated appropriately the benefits can dramatically increase. Another point for consideration is that technological and other learning formats will contribute to the further standardisation of corporate education crossing borders, identities and culture whilst also eliminating aspects of these at the same time. Similarly a key point to also raise is that corporate education will (if not already) develop and possibly move into the domains of primary, secondary and tertiary education making these longstanding sectors part of what may become a unilateral perspective for these traditionally diverse educational fields that is lifelong Vocational Education and Training. Considering this the propositions such as those identified in the study could be developed as a best practice for corporate, primary, secondary and tertiary education to ensure unilateral does not outweigh the current dialectical and pluralistic status.

Possibly minority and diaspora groups will identify the directions education (whether corporate or scholarly) is taking and may possibly be constrained in their ability to limit the effect it will make upon their cultures and identities and potentially powerless to stop or even moderate this process. This process could lead on to one of the following occurring:

- A revolution in corporate education once employees become aware of the loss of power and to some extent elimination of their identity and culture as a result of work homogenisation extending to home and personal life.

OR

- Education as we have currently and traditionally known will be lost to possible corporate manipulation and as a result there will be a deterioration leading to an *Orwellian 1984* model of education in society.

The study potentially provides practitioners, researchers and scholars with cues and ideas that can be further developed or critiqued as the basis for research studies within not only the corporate education sector but possibly within other sectors of education. When looking at the area of possible future research studies the researcher reviewed not only past papers from the field of educational research but he also reviewed themes and ideas from non educational sectors. The more the researcher read the more he identified possibilities for his study branching into other fields of study such as health, politics, sciences and more. Considering the research study's direction and linkage with Third Space, Identity, Culture and Practice there is a strong basis for further research in not only education but across many fields of academic study and of professional practice.

Recommendations

In writing this chapter the researcher challenges his fellow practitioners to review the study's recommendations and to at least consider them within their own practices.

This is done through recommendations for changes in:

- Further Research
- Research Methodology
- Concepts, Knowledge and Practice
- Practical and Theoretical Constructs
- Organisation, Procedures, Practices and Behaviours

The researcher has also identified additional recommendations that are related to his study that are not only for practitioners to consider but also a wider audience to examine. There is also a recommendation that the researcher puts forward to non-educational fields which will also be discussed in this section. It is hoped these recommendations may at best develop proponents and/or critics of the researchers study, nonetheless, this does not matter as the dialogue that this study may create in an area of corporate education is a sufficient enough result (for now).

Further Research

The researcher recognises the limitations of this study and as an over-arching recommendation for future research strongly proposes that a further research study be carried out involving a wider group of participants, identities, cultures, modules, trainers as well as a wider array of facilitating formats, different researcher (not the author) and a replication of the practice used by this researcher. It is only through performing further research using the above (and possibly more as the above is not exhaustive) that an improvement of this initial study can be made eventually honing and sharpening the practice so that it is more reliable, valid and useful.

The first of these further studies is recommended within the field of Third Space, which though studied and researched across many domains from the social to the political, seems yet to be thoroughly researched within the domain of corporate education. Similarly the learner's identity and culture has been in some cases largely ignored within the corporate education field and requires sound investigation if current practices and practitioners are not to be viewed as harming not only their own practice but also that of *our* practice. Also there is an urgent need to redress the linguistic blindness that exists across corporate education. The current anglo-centric approaches that occur in many cases are tarnishing corporate educational practice. The research identified this basic set of enhancers and detractors which ultimately need further research work performed on each to enhance and hone their different perspectives and impacts whilst also developing practice.

An area for further research as identified through the study is how its findings can potentially be translated into other domains. While there is a definite need to complete the previously mentioned research first, there is a need to transcend corporate education with the study's findings so as to possibly affect equally valid issues across the domains of politics, health, science and more. The study in no way claims to resolve *world hunger* as the study is not a panacea for all *ills*. However, it became apparent during the study that the issues faced in corporate education are not solely located within this field. The researcher realised that the unilateral approach adopted by some corporations seems too systemic in the way many institutions across government and business handle affairs. So many issues and

problems exist not just within the corporate education field that could and should be similarly researched to identify a more dialectical and pluralistic approach.

Therefore, if there is an ultimate research area that the researcher may look to work further upon himself it may be the need to extrapolate his studies and promote similar research in domains beyond corporate education, as these have at least equal influence on corporate education over time.

Research Methodology

The researcher being more of a practitioner than a scholar realised early in his research that the mixed method research methodology was a sound way to proceed as it provided a variety of approaches that lent credibility and validity to the study. In adopting his methodologies the researcher identified early on that the content analysis method and Insider/Outsider method provided a good fit to his needs and the study's requirements. Eventually the researcher's discussions with colleagues and scholars allowed him to settle on these as the overall approach to his studies.

In retrospect the researcher can review the study and identify the following changes he would make in regards to the methodology he adopted for the study:

- The global financial crisis meant limited participation by stakeholders, hence the need to increase the group in terms of participating countries, trainers and participants in any future replication.
- The module selected to study was ideal in that it is a good representation of similar modules run in-house across many organisations. However the adoption of another module to study and cross compare with would lend greater weight to the study.
- Finally the other change that the researcher would make would be to try to spend more time involved with observation and interviews in order to gather more data thus providing a greater chance of enhancing the comparison between groups.

In terms of what potentially could be looked at for changes in methodology from the study for the future are highlighted below:

- Researchers who conduct studies on corporate education should outline their approach and reference it for other practitioners so that it can be replicated. This is not always done by researchers yet seems so easy to include.
- Researchers must look to make their methodology basic for practitioners to use in their day to day roles. Adopting a KISS (Keep It Simple and Short) approach may seem devaluing or scaling down research to a lower denominator. However, it does allow for greater application which in time may prove to be more valuable.

Concepts, Knowledge, Practice

There are several changes that the researcher would propose in regards to how concepts, knowledge and practice within his field of study are used. These changes are based on the issues faced by the researcher in his current approach to the study and how current views on these three areas are not always necessarily representative of practitioner views in current practice. Each of these views and proposed changes are covered below.

Concepts

The researcher recommends major changes in the way that two major concepts are used, or more accurately not used within corporate education these are *identity* and *culture*. From the researcher's perspective both of these concepts seem to be shortfall within corporate education. Their absence in some cases from the analysis and development phases raises the question of what are practitioners really working with when they talk about *audience* at these phases. A common practice that seems to be taken when looking at audience is to look at the job description targetted rather than looking at the actual person who fills the role. This current practice of playing the job title rather than playing the person from the researcher's perspective is a misconception which as practitioners we seem to have slipped into as we have possibly fallen short understand just what a learner truly is. Considering this, the researcher recommends that the concept of identity and culture should be emphasised as part of the analysis and development phases of the curriculum development process driving practitioners to look more to the person rather than the role.

Knowledge

Practitioners need to review and reflect on what we think we know against what is truly known. What we as practitioners believe we hold to be true in terms of knowledge may no longer be a valid basis to rely on or rest upon. Practitioners in some cases have rested upon their laurels going through the motions of programme development using the tried and trusted ADDIE model (Analysis, Design, Development, Implementation and Evaluation). What is being missed by some practitioners from the researcher's perspective is that there has been a generational change of learners and their expectations are similarly different. Learners in some cases are more self-directed, oriented to different motivations and no longer driven solely by money or promotion. As the baby boomers exit the workplace, we are seeing the x, y and z generations begin to move through the corporation with different identities, culture and motivations. These, if not tapped into, may result in younger participants moving on to other employers who better understand their identity and culture. A recent report from the United Nations succinctly identifies this issue well:

With the upcoming demographic shift, the organizations trained to bridge the gap between traditionalists/boomers and GenX and GenY, mindful of their different values, will be able to succeed, attract, retain and engage the GenX and GenY, this talented generation of employees.

(United Nations – Joint Staff Report, July 2009, pg 10)

Practitioners therefore need to consider their knowledge regarding training and similarly look at the currency of their ideas and methods so as to be able to deliver programmes that allow individual mobility, self direction, discovery, exploration and command of technology as well as meeting corporate goals. Practitioners need look to not only third space for answers and solutions but beyond that third space to create their own third space, which would allow not only their knowledge to develop but similarly the field of practice to be transformed.

Practice

This more than any of the other items previously discussed is where the researcher views the greatest changes being needed and makes the following recommendations regarding practice in regards to his field as an experienced practitioner and the area of research as an apprentice scholar. Both of these are not exclusive, however, they are dealt with individually below.

Research Practice: Research from this researcher's perspective in terms of practice from a corporate perspective is generally in need. Scholars should look at how they can work with practitioners to develop research in the area of corporate education. Scholars need to also demystify the research process for practitioners so as to allow practitioner access to research practice and its outcomes. The potential advantages of collaboration between scholar and practitioner are too important and fertile to ignore. The researcher's views are in line with other scholars who also see the potential collaboration such as Ospina, Godsoe, Schall and Dodge (2002)

In our view, one of the most promising strategies for addressing the gap between theory and practice is co-production. Co-production refers to the joint inquiry work of practitioners and scholars, which requires the mutual acceptance of each other's points of reference and appreciation of what each party brings to the inquiry. Co-production builds on the expertise of both practitioners and scholars without privileging one set of experiences or skills over the other. One outcome of this kind of work is practice-grounded research, research that is based on data that comes directly from practice and yields findings that can inform practice.

There are certain preconditions to making co-production work. Specifically, scholars must make a commitment to doing research that is based on the needs of practitioners and that is organized to provide knowledge that is relevant to and informs practice. A second precondition for success is for practitioners to suspend any preconceptions about academic research they may have and trust that there is a way of doing research differently. They must also have faith in their own ability to do

research. When these preconditions are in place, practitioners and scholars can come together to use new and creative methodologies to co-produce knowledge about leadership. Often times the first step of this co-production process is aimed at developing mutual trust as the foundation for a productive working partnership.

(Ospina, Godsoe, Schall & Dodge , 2002, pp. 3-4)

Field of Practice: In regards to changes required when it comes to the corporate education field of practice there are three basic changes needed which relate to previously discussed Concepts and Knowledge:

- Practitioners need to reflect on current practices and identify the extent to which their process is corporate driven or learner driven respectively.
- Practitioners need to overhaul practices so that they are more in line with learner's circumstance to ensure that their approaches and implementations meet the learner's needs and not just a role/job description.
- There is a need to re-think the ADDIE (Analysis, Design, Development, Implementation and Evaluation) approach, especially when it comes to module and programme evaluation.

The field of practice needs to take greater responsibility for not only providing the processing skills required for current roles and responsibilities but also for transcending this to create critical thinkers, innovators and paradigm shifters who will *trail-blaze* a new path for not only current business but also re-invent current knowledge and thinking. If we, as practitioners, take on this meta-cognition as a practice we can then begin to reflect, review and create a greater field of practice within corporate education that goes beyond what is in some cases a current rote, didactic and traditional approaches that no longer fit an evolving learner, workplace, and global society.

Practical and Theoretical Constructs

While the constructs discussed below are more related to practice, there are also some scholarly constructs which are also identified within this section as needing modification.

ADDIE (Analysis, Design, Development, Implementation, Evaluation)

Though previously discussed in terms of its usage, it is important to look at it separately as a singular construct. ADDIE has been a model for training practitioners for decades as it embodies the elements that are generally used in the creation of corporate training modules and programmes. Over time this method of training development has proven to work well. The issue we face today though is that current practice requires an updated construct that allows for greater learner depth which practices such as ADDIE do not fully permit. Thought could be given to other models such as Gagne's (1983) nine points of instruction which cover:

- 1) gaining attention*
- 2) informing the learner of the objective*
- 3) stimulate recall of prior knowledge*
- 4) presenting the stimulus material*
- 5) providing learning guidance*
- 6) eliciting performance*
- 7) providing feedback*
- 8) assessing performance; and*
- 9) enhancing retention and transfer*

(Gagne & Dick, 1983, p.261)

Constructivism is another model that can be considered in terms of instructional design. In this model instructional situations are created that are student-centered, student-directed and collaborative with the trainer playing more of a supportive role facilitating the learning process. In this scenario learners/workers are free to determine what and how they learn creating a move from a classroom learning situation with everyone learning at the same time to a more self-direct learning approach where each learner learns at their own pace, level and particular content. This allows learners to take ownership of their own work in real life contexts that provide more meaning to them.

What the researcher does propose though is an inclusion of some of the following elements (namely identity, culture, learner) for further review and analysis within the total ADDIE model.

Identity

This is a construct that from the researcher's perspective seems to be undervalued within current corporate training spheres as it is viewed by some in the corporate sector to have no relation to corporate aims. Identity at an individual level needs to be factored into corporate education because its value holds a potential for training materials and programmes to provide greater impact. The study identified that a level of understanding of identity could create materials that participants could identify with more readily and therefore adopt with better outcomes. Identity at any level from sex, age, culture, role, country, location and more provides something greater than what currently exists in many situations. A clinical module and programme that whilst technically brilliant is lacking any personal or identifying characteristics to which participants can relate, holds a lesser chance of success than one that includes facets of a participant's identity.

Culture

Similar to identity, this construct within the field of practice has become more focussed on corporate culture. The identification of at least the construct of a corporate culture demonstrates that the corporation at least recognises that such an entity exists. This is promising in that the concept can expand beyond corporate culture into other areas, possibly into those discussed by Schein (1997). The work on culture by Schein (1997) identifies four types of culture being macrocultures (nations and global professions), organizational cultures, subcultures (communities in organizations), and microcultures (microsystems within organizations). However, there is currently little evidence that such recognition exists within the context of this study. What has held many modules and programmes together through this study has been the corporate/organizational culture glue. The benefits of working with this construct beyond corporate culture are evident in the success of the efforts which were attained by those countries that localised modules and programmes thus producing greater benefits, in relation to some of those countries that left the programme in the original format. This again has potential links to Schein (2011) who recently commented on the importance of corporations/organizations developing "*cultural islands*" where members from different occupational fields and nationalities could discuss issues

more directly within an environment where controls and regulations could be temporarily suspended. This study demonstrates that this seems to be somewhat occurring across occupations nationally, the next stage is to engineer the potential for this to occur further across nationalities as well.

Learner

This was another construct that from the researcher's perspective needs to be reviewed for a more contemporary application. There has already been discussion on the researcher's view on how some practitioners have unfortunately moved away from what was once the identification of the learner as a person to the identification of the learner as a role occupant. The perception that the researcher sees with this situation is that unfortunately the learner is no longer humanised but rather is seen as a component instead of a person. The researcher believes that there should be a shift of this construct back to the learner being seen as an individual. This shift will allow the construct to identify the learner and the role together ensuring that all skill gaps are identified and addressed. The current role construct from the researcher's perspective fails to look beyond the role dimensions to more personal issues such as literacy, numeracy, experience in field, information systems knowledge, process experience and more. All these learner attributes have an impact that contributes to the role and it is imperative that the construct of learner acknowledge these. This from the researcher's perspective will allow the construct of learner to return to a more centred/grounded space that will similarly ensure that modules and programmes either acknowledge existing knowledge or provide supplements that ensure learners are *on the same page* and nobody gets left behind.

Moving into the scholarly constructs the researcher recognises he is looking at learning more often from a practitioner's perspective, and by acknowledging that he is less able to speak authoritatively about scholarly issues. However, he also identified the below constructs that should be earmarked for review.

Research

There needs to be a dramatic paradigm shift for this construct from both the scholar's and practitioner's perspectives. First from a practitioner's point of view,

this construct is initially daunting and then moves on to become downright confusing. The level of research that some practitioners have dealt with in the past is often only at surface level. As a result, practice is losing ground to corporate pressure as it cannot meaningfully hold its ground against the bottom line argument. What needs to occur is a re-think of the research construct – at least for practitioners – so that it moves away from a confounding theoretical construct to become initially a more meaningful process that is grounded in practice. There is room for research then to develop into more abstract and theoretical levels. The key is to do this in stages and levels so that the practitioners do not become discouraged and walk away at an early stage: then both fields of practice and academia do not lose. The construct needs to be embedded into current corporate education practice so that practitioners are not only comfortable in dealing with it, but also that corporations can appreciate its ultimate value to the corporation well-being.

Research from a scholar's point of view similarly needs to better organise itself so that it provides a more practical pathway for scholars to follow. The researcher found that the lack of such a pathway approach complicated the progress from a Masters level to a Professional Doctorate level. The breadth and depth of knowledge that this Masters to Professional Doctorate movement entails, is similar to moving from an Olympic pool to the Pacific Ocean. The researcher has no hard evidence or facts to support this claim except the personal and the repeated experience of his fellow students who over the years have recounted the same experience.

There seems to be no Professional Doctorate level of curriculum guideline, measured progression or scholarly advice. As Professional Doctorate scholars we seem to have been given an Academic Doctorate or PhD template and told to make do with academics teaching and confounding us with PhD course work rather than professional doctorates guiding us. (Anon – Student from 2009 conference)

The above sentiment from a professional doctorate colleague indicates that what needs to take place is that through the experiences of professional doctorate

students, a curriculum and tiered programme needs to be developed. Such a programme needs to acknowledge previously discussed constructs of identity, culture and learner because if research at the Professional Doctorate level is to succeed then it cannot merely copy and paste in a scholarly PhD programme. Similarly it needs past professional doctorate students involved with the academics to assist in guiding what is commonly a group of practitioners through the mystical and often confounding processes of academia. Suffice to say that the advisor – at least in this researcher’s experience – currently plays a huge role in providing this guidance, however, some of this should also be incorporated within the course work as well.

Research Methodology within the Education Doctorate

The comments made about research, hold similarly for the research methodology within the Education Doctorate programme. Therefore, the main issue that needs to be addressed with methodology is that as a construct within the Professional Doctorate it could be more practitioner based. The current construct taught regarding methodology in the course work stages prior to completing the thesis seems to be all encompassing in some regards but also very exclusive in others. What this researcher found is that while some students and scholars during the course work stage viewed the approach of mixed method using content analysis and an Insider/Outsider perspective as being a sound approach, others found this approach to not be considered as a method at all. The researcher was uncertain on several occasions during his initial early stages within the Education Doctorate whether his approach was valid or not. Overall it is important to acknowledge that the advisor role if anything is crucial. What the researcher recommends in regards to the methodology construct is a review of this for the professional doctorate programme particularly within the early course work stages. Possibly a range of methodology and examples would provide the greatest benefit for Professional Doctorate scholars at the outset of the programme.

Finally it is important to acknowledge that the construct of the Professional Doctorate in itself may need exploring and review as the research and research methodology within the Education Doctorate discussed above demonstrate that

the construct of Professional Doctorate could be viewed as little more than a scaled down PhD, which without the critical input and role of the advisor would (and nearly did) fail in this practitioner's case.

Organisation, Procedures, Practices, Behaviours

The researcher identified via the study several areas for consideration in regards to the organisation, procedures, practices and behaviour; these are consolidated below.

Procedures

There are multiple procedures within organisations that may in some cases prohibit rather than permit a better level of corporate education to occur. Such procedures extend from limits set on communication to demarcation issues of who does what. There are also some procedural limits in regards to resources, time, budget and more which similarly restrain corporate education development. Change needs to occur with a review of all procedures. Organisational procedures are inherently littered with unilateral jargon which has in some cases led to a mindset that rarely goes beyond procedures to charter new domains which may bring greater, more effective results. By overhauling existing procedures in light of new perspectives we can begin to unravel better solutions and results for all learners, stakeholders, practitioners, scholars, organisation and the field of practice itself. This is in synch with other practitioners such as Kelly who state:

An organization's mind-set, culture and procedures can smother inventiveness to the point that fewer and fewer ideas come forward as the creative mind gives up on navigating bureaucratic obstacles and numerous standard operating procedures. (Kelley, 2001).

Practices

What has not been discussed in relation to practice are those practices, similar to procedure, which need to be scrutinised and then overhauled. An example of this is the current practice in some organisations of fast-tracking training by having all staff and cultures trained together in one programme. This situation is fine if there are provisions that allow for learners to not be lost in the mass, proper translation to

increase understanding as well as provisions for saving embarrassment in large groups and a minimising of *losing face* and so on which can be the current situation. What is needed is a practice that incorporates training activities in smaller groups that allow learners to firstly interact and then be heard without fear of reproachment or embarrassment. This study if nothing else highlighted that current good practice requires changes that can only come from the changes that practitioners themselves make in their own day to day practice. Coupled with good research this change in practice can and will provide better results not just for both learners and practitioners but most of all to the standing of the field of practice.

Behaviour

The changes that need to take place in regards to behaviour can be best summed up with a shift in terms of organisational politics. There is not much more that needs to be said about this except that in some cases politics are focussed on a head office adopting and imposing a unilateral approach. A change in behaviour (and possibly power relationships) needs to take place with a more multi-lateral approach that encompasses empowerment of the lower levels being adopted by organisations which in turn can provide a greater level of empowerment to head office staff in terms of the level of their success. Therefore behavioural change is needed with movement from the current top to bottom approach towards including a more bottom to top approach. Whilst challenging and unnerving as this may seem for executives, it will not only promote an overall behavioural change in staff but it will truly empower the organisation. Opening up the organisation and all its elements to a greater level of true understanding, decision-making and freedom that will flow through not only to corporate education but many other corporate domains. Argyris (1998) in his work the *Emperor's New Clothes: Empowerment*, explains importance of empowerment in line with the researcher's views:

If management wants employees to take more responsibility for their own destiny, it must encourage the development of internal commitment. As the name implies, internal commitment comes largely from within. Individuals are committed to a particular project, person, or program based on their

own reasons or motivations. By definition, internal commitment is participatory and very closely allied with empowerment. The more that top management wants internal commitment from its employees, the more it must try to involve employees in defining work objectives, specifying how to achieve them, and setting stretch targets.(Argyris, 1998, pg 100)

Organisation

The greatest change from the researcher's perspective that needs to take place with the organisation is the realisation that their general approach to training related matters (corporate education) often needs credibility with its participants. There is a need for corporations to view their role as not purely money making machines but if they intend to hold on to talented and skilled staff they need to see their organisation more as knowledge incubator designed to develop and enhance staff at a professional as well as personal level. The researcher through his experiences to date has often noticed that corporations that have adopted such approaches, not only view their staff as a whole person but also encourage them to take on a more wholesome approach to their work and life by incorporating health, diet, spirituality into the training cycle creating a positive spirit for all workers. This is in line with Kinjerski and Skrypnek (2005) work on *Creating organizational conditions that foster employee spirit at work*, who state:

Spirit at work, at the personal level, reflects a distinct state that involves profound feelings of wellbeing, a belief that one's work makes a contribution, a sense of connection to others and common purpose, an awareness of a connection to something larger than self, and a sense of perfection and transcendence. Perceived as beneficial to employees, customers, and employers, spirit at work is being promoted by academics and organizational consultants. Organizations are introducing programs to increase spirit at work, however, research identifying organizational characteristics that directly cultivate an individual's experience of spirit at work is lacking. (Kinjerski and Skrypnek, 2005, pp26-42).

These corporations unfortunately are bedded within the more affluent professional roles where talent for particular roles is harder to come by. Yet it is interesting to note that the researcher believes the same results could be equally gained for any vocation if handled in the right way.

The time for change has arrived and similarly change needs to be widespread – not isolated – if it is to have the greatest chance to succeed. This section of the research does not propose to have the solutions to all issues nor does it stake recommendations as a panacea for current issues and problems that organisations may face. The study has identified that current practices, procedures, behaviour and organisation are not always conducive to a wholesome corporate education. The recommendation for changes made are a sample of recommendations which will at least take a first step and achieve greater dialogue on a topic that is long overdue for discussion and changes.

Chapter Summary

The focus of this chapter has been on the conclusions, implications and recommendations resulting from the study as well as how this study has produced more than had been initially expected. The study has not only provided direct answers to the questions posed but has provided a range of conclusions which when converged with varying implications together allowed the researcher to draw out and provide a final set of recommendations for future practice such as the power of the organisational culture and the potential of Third Space in corporate education. The study also identified many other factors such as the role of detractors from training effectiveness including colonialism and the unequal treatment of cultures in some cases that takes place in practice (in a veiled manner that many practitioners may largely be unaware of). These recommendations need to be addressed not only by future practitioners but also by researchers, scholars and other organisational and academic stakeholders as they provide widespread opportunities for the general improvement of corporate education.

6 – Reflections

Objective of this Chapter

This chapter is designed to provide a more personal view of the study. It was never intended as a chapter until the researcher through discussions with his advisor realised that his personal learning was just as much a part of the thesis journey as the thesis itself. Therefore this chapter evolved into something that is not only evidence of the success of the study but also is a critical piece of evidence for practitioners and scholars alike that reflection is an important aspect of their work.

My Identity and Place within the Study

It is important to restate the task that the researcher set out to achieve through the study was to identify:

What is the influence of intercultural factors in corporate education?

The more the researcher delved into the works of Said (1978), Bhabha (1994), Spivak (1988) and others the more he became aware that his feeling of dissatisfaction with the current state of corporate education was more elaborate than the previous issues relating to practice that he had felt as a practitioner. Instead the researcher's dissatisfaction was more related to his identity as an immigrant who had been colonised in a new country setting. The process of colonisation had seen the researcher's previous identity and culture diminish as a result of having to adopt a new culture, which at the time had little place or tolerance for more than its own cultural characteristics. This meant that the researcher's original cultural identity had been *white-washed*. The realisation grew within the researcher that there once had been another identity and culture which had vanished. This realisation was as disappointing as it was alarming. These awakenings led the researcher to delve further into this dissatisfaction to try to unravel other issues that may be related to his identity and practice as an educator.

A further de-layering of issues by the researcher, ultimately saw him realise that the core-root of his dissatisfaction was that he had inadvertently and

unconsciously adopted the colonialist approach in his own role as an educator. This more than anything else is what shocked the researcher as he realised that he had developed into the very being he had discovered that his study was attempting to prevent. In short the colonised had become the next generation of colonisers. Reflecting upon this newly found understanding the researcher was at worst faced with the fact that his practice was at least now out in the open for all to see as a colonialist practice. The positive side of this unravelling situation was that the researcher could move forward with an approach that:

- confirmed he knew what he was talking about in regards to educational practices that were unilateral in their approach (as he had been an inadvertent practitioner);
- demonstrated that the researcher when faced with his worst fears could identify what they were and similarly be honest in recognising his own transgressions as a practitioner;
- allowed the researcher to use his own experiences as a benchmark for further discussions with others in similar situations; and
- provided a step towards the researcher's guide which could be a template for other practitioners and scholars facing similar situations.

That is the researcher, now, knew where he stood in relation to the issues involved. More importantly he could now clearly indicate this to others.

Finally, the ability to progress to the root of the research question for the researcher was a cathartic experience as it provided a release of strongly felt feelings, emotions and pressure. All of these had been originally thought to be practice related, however it had become apparent that these were equally, if not more personal, identity and culture related. The release gained from this reflection was as life changing to the researcher's identity as it was to his practice as both were freed from this previously unknown inhibitor. An inhibitor that could now be understood and dealt with across the researcher's life space and not just in his work as a practitioner.

The Pre-Journey

It is important to provide some reflective comment on what took place prior to the study which led to the study. This, the researcher calls the pre-journey.

The pre-journey has been the long and winding road that has led to this study as it combines the researcher's professional organisational career with his academic studies. This path was initially set by the researcher's first training manager – John to whom he is forever thankful – as he employed the researcher to work as a trainer but then permitted the researcher to attend university for one afternoon every week for two years to attain his Diploma in Adult Education. What grew from this initial education was a realisation by the researcher that vocational education and professional practice provide a win-win situation for both learner and their organisation/employer. What also came from this symbiotic relationship was an enduring love of lifelong and life wide learning.

It is also important to note that the researcher vehemently believes that practitioners must undertake some form of academic education related to their field that will complement and enhance their professional practice. Through academic study, practitioners can explore other colleagues' ideas and opinions, read scholar and practitioner literature and then discuss and debate these in a forum with other practitioners. This allows practitioners to then take these *learning's* and apply them in their professional practice which ultimately leads to improvement and greater learner acquisition. The researcher was able to do this throughout the early stages of his Diploma and Degree which simultaneously permitted him to develop and grow within his role. As the researcher grew academically he also grew professionally moving from organisation to organisation to use his skills in different training environments from energy to finance. When the researcher reached Masters stage the relationship between his academic and professional development strengthened.

Once the researcher entered the academic Masters stage, his professional practice began to exponentially grow as he was introduced to new concepts and theories. Building on these new concepts and theories and merging them with his own professional practice to form hybrid models of practice, he then used these in his day to day operations, greatly benefitting his learners and the organisation. This in turn led to greater levels of professional recognition for the researcher, which ultimately assisted progress and promotion to become a manager within his field.

Finally, it was as the researcher continued to combine his academic knowledge and professional expertise with current marketplace educational trends that he began to consider the possibility of attempting a professional doctorate. Acceptance into the professional doctorate in turn, led the researcher to again expand reading and studying this time in the particular field of those intercultural factors affecting corporate training. He also began attending not only the more usual professional conferences and workshops but also relevant academic conferences to learn and discuss concepts, theories and his ideas with scholars and researchers. Again, it was through combining the professional and academic that the researcher's greatest *learning*'s were achieved.

Therefore, the researcher calls on all practitioners to embark upon their own journey that combines practice and academia. As adult education professionals it is important to adopt similar approaches to those taken by the medical and legal fraternities who are required to continually educate themselves to maintain their own professional currency in their field. Similarly, professional educators should also continue to develop and learn so as to ensure their learners have the benefit of the best possible techniques for knowledge acquisition. Failure to do so not only demonstrates an inability to remain current, but also an inability to demonstrate that learning is a lifelong practice that not only applies to students/learners but also trainers/facilitators/practitioners as well. We as practitioners must truly practice what we preach as teachers we must also be lifelong learners.

Navigating My Journey

This section is a personal account of the situations and experiences encountered by the researcher through the maze of the academia and corporate worlds.

In regards to corporate, the plains that need to be traversed are those that allow the researcher to:

- develop a strategy to conduct the study;
- identify the circumstances and situation towards a sample;

- work with colleagues that are supportive and encouraging.

None of the above come instantly as in some cases it takes years to forge work relationships that will permit the above. There is no doubt that company protocols play a role in this as working with any of the above also entails moving into new fields that are outside your spheres of influence as an employee, practitioner and researcher. Therefore, whether as a researcher, trainer or practitioner one needs to adopt an amiable approach to all you meet in your work-life. This means helping others and going the extra mile or two for internal customers (at above and below your hierarchical level) on a regular basis which will lay a solid foundation for long lasting and valuable relationships.

In regards to academia, the plains that need to be traversed are those that allow you as researcher to:

- work through the doctorate course work programme;
- work through your dissertation proposal;
- work through your ethics requirements;
- work through and provide your doctoral presentation; and
- work through and attain approval for your thesis.

The researcher without any doubt places the success of any aspects of his academia journey down to the guidance of his advisor who explained to the researcher that it was more a case of understanding what academics look for within proposals and ensuring it is included in a detailed yet succinct manner.

There is a personal plain to be traversed that the researcher has not delved into here, however, this will be different for every researcher, suffice to say that if you do not have a supportive and stable home environment then embarking on such a research programme may not be advisable.

There is another area that needs to be explored, which sits in the box called *What Is in It For Me* (WIIFM). This involves the researcher's personal ambitions and aspirations involving his research. Whether the following are viewed as clandestine, egotistical, naive or otherwise it is important that researchers are honest enough

with themselves let alone others about what their *end game* is for their research, this researcher certainly aims to expose all of his below:

- Being a tool for practitioners to improve their own practice (and simultaneously the field of practice overall).
- Being a piece of evidence for scholars to improve their own knowledge of the field.
- Having the researcher's work acknowledged by others within his field (or outside his field) whether proponents or opponents.
- To have others take the researcher's work and develop it further.
- Being identified as a knowledgeable practitioner in the field.
- To obtain a role in a corporation that is looking to forge ahead with similar ambitions and aspirations as the researcher's in regards to education.

The researcher would ultimately like a job/role in an institution where he can make a difference using part or all of the study. In particular, the researcher views institutions like the United Nations, UNESCO, ASEAN, Government or a secondary or tertiary public or private institute where he could work this for the next generation of practitioners and scholars. As ambitious as this may seem the researcher feels there is a need to take the next step with his own future research in this direction as his study is not just another text on a shelf but a catalyst for the change that he initially set out to achieve which is to make a difference.

My “Learning’s”

The researcher is aware that having completed the journey provides a vantage point to look back on what has passed. Some of the passing stages have included situations and outcomes that were foreseen, whilst some stages and situations were learning revelations. Again, it is important that as researchers we highlight these *learning’s* which can serve as a guide for others to see that the study can provide findings that can be enlightening as they are surprising. Considering this it is also important to note that it is the researcher's own biography that has also provided a rich level of information acting as part of the research as well. The following are some of the more stand out *learning’s* the researcher faced from

several perspectives including Practitioner, Researcher, Employee/Trainee, Scholar, Father, Son, Husband and overall as an Adult.

Practitioner

Whilst the research identified issues relating to the harming of personal cultural identity, there are best practices from up-and-coming domains that are potentially identity neutral or even positive and hence not as culturally damaging. Some of these practices include multimedia approaches, internet, blogs, wikis and more. This neutrality led the researcher to also discover past considerations of a universal language practice such as Esperanto, which was developed as a language by L. L. Zamenhof whose goal was:

.....a second language that would allow people who speak different native languages to communicate, yet at the same time retain their own languages and cultural identities. Esperanto doesn't replace anyone's language but simply serves as a common second language.

((1887) Zamenhoff, L.L., (2013) retrieved from Esperanto website at
<http://www.esperanto-usa.org/en/content/esperanto>)

This in essence draws very close ties to what this study's findings demonstrated. Failure to realise that the continual misinterpretations due to the use of a single existing language leads time and again to a general lack of understanding and hence *mis-learning* which detrimentally effects bottom line production. Furthermore, looking at the educational impact of this approach includes loss of programme reputation, along with damaging organisational reputation, which again weighs on participants trust, belief and motivation for their role. The main conclusion that can then be drawn from this is that, as trivial as it may seem, adoption of non-related specific cultural terms erode many facets of the organisation and amounts to practitioner mal-practice, if it is not at least acknowledged by practitioners. While practitioners are in no way responsible for determining all aspects and directions of educational programmes that they implement they as professionals must at least raise awareness among decision-makers of these issues.

Another practitioner learning that has been identified is that the current level of analysis and evaluation as it is conducted in corporate education is very Anglo-centric/Eurocentric in its nature. This harks back to the previous discussion regarding colonialism and particularly the management and control of colonial civil servants. Though colonialism may have ceased (to some extent) in the political sense of countries colonizing other countries, there is still a definite knowledge colonialism in most corporate education. Possibly the more startling aspect of this revelation was that the researcher realised his own unconscious past covert involvement in this corporate colonialist situation. As a final comment, which demonstrates that practice needs to be a continuously improving phenomenon, the researcher will continue to pursue his practice with a spirit of not only a “*do as I say*” approach drawn from this study but also a “*do as I do*” providing the ultimate demonstration that practice is evolutionary.

Researcher

The most significant learning to come from the study in regards to the researcher aspects were the results of the change that took place in the researcher over the path of the journey. This started with the initial realisation by the researcher that there is no absolute right or wrong but rather just different perspectives. This went beyond what the researcher previously expected and ended with him adopting a newer perspective, that for things to change you need to not only implement but also create the change. This point though simple was a surprise for the researcher as it pressed him to challenge himself professionally and also challenge the status quo on educational aspects and other related aspects. The result of which created a more confronting researcher who is not more argumentative but more willing to use his knowledge in a way that assists in educating others. The researcher became someone who opposes subjective hearsay and non-scientific facts preferring objective evidence based scientific information that is firmly grounded in study and research. In short, he became a person who is willing to challenge others who pass opinion based on fashion rather than what is factual which has led to many lively and interesting debates with family, friends and work colleagues. The researcher hopes this will arouse others to consider basing their knowledge on facts rather than *what feels right at the time*, hearsay or tabloid journalism.

Employee/Trainee (Learner)

In terms of the researcher's *learning*'s gained as an employee and a trainee they are one and the same. Such lessons learnt included not allowing your identity as an employee and trainee to be over-ridden by the organisation, but instead looking to incorporate it into the potential Third Space practice. Too often across organisations, the pressure to disseminate the skills and knowledge to the participants means identity is lost in the rush. The inability of organisations to first recognise the identity of their participants and then use this to assist with the learning has probably been the greatest disappointment and loss that the researcher feels he has recognised through the study. However, once employees and trainees are recognised and acknowledged for who they are, instead of being regarded as just a role within the organisation, then the greatest educational benefits can and are gained (see the next section Scholars on this matter). In those organisations where identity has been recognised and worked with the rewards have been beneficial for both employee and organisation.

The researcher looks back on his own time as an employee and trainee and realises that his identity and style of learning have vanished not only in the workplace but also dating back to his time as a school child. This study is not intended to provide a psycho-analysis for the researcher. However, it did provide a crucial insight into a question that has been bothering the researcher for decades which is why as a learner did he initially fail Grade One at school suffering the embarrassment of repeating it (and creating lasting memories of learner inadequacy and constant analysis of what did I do that year to make myself fail) and then subsequently fail certain subjects in later grades. The answer to this comes in the realisation that the researcher was never able to be himself in Grade One as a learner, as his approach to learning differed completely from the way he was taught at the time. As hard as this may seem to believe, the researcher can remember how Grade One was all about rote learning which in short is remembering what you have been taught but not necessarily understanding what or why you have been taught it in context. The researcher can recollect how over the years at school and in the workplace his identity and hence learning style has always been about discovery in terms of context. Therefore, when tested at the end of Grade One by his teacher to spell a word on the chalkboard in class and

told that if he misspelt it he would repeat Grade One, the researcher was never going to be correct as he asked the teacher what the word meant. So the researcher repeated and stayed back a grade watching his class-mates progress at the end of 1973 and never understanding as a learner what he did wrong besides spell the word incorrectly.

Reflection provides not only a cathartic relief for the researcher but more importantly comprehension and understanding of the importance of the practice to respect the identity and learning styles of not only students but anyone especially employees and trainees. Paramount to this is the importance of ensuring this practice is promoted and used within organisations which is why it is the responsibility of employees and trainees alike to demand it be used as no lesser a right than a form of acknowledging educational equality. Similarly Scholars need to also be aware of this which we shall discuss in the next section.

Scholars

The scholars referred to here are the academic teachers the researcher was privileged to work with at the University of Technology Sydney (UTS). The scholarly domain not only taught the researcher how to become a better font of knowledge for others to turn to, but also provided a dotted line between that of practitioner and scholar where the two often merged. As the researcher learnt and watched the lecturers and facilitators at the University of Technology Sydney (UTS) it became apparent to him that the best approaches taken by these scholars was to allow their learners to interact and facilitate themselves in whatever direction and approach they took within the parameter set by the subject under consideration. The maturity of adult learners naturally contributed to this as the learners ensured the topic was pursued within an environment of trust and freedom that allowed learning to take place. The researcher noticed, that by the scholars adopting such a practice the learners were able to bring their own approach to learning as some learners took notes and never spoke, some spoke and never wrote, some did both whilst others interjected with points and questions as they felt the need. Similarly the classes involved discussion, debate, lively demonstrations, white-board displays and more. Over many years, the researcher

also saw hostile learners walk out of these classrooms never to return, as well as those, like him, who returned again and again with an appetite for more. Either way the scholars let the discussions run and similarly provided a freedom and space for the learners to be themselves and learn in their own way.

The scholars were accused by some of not really doing much, as the students often taught or learnt from each other, however, it was the scholarly use of a subtle question now and then that guided the researcher and his classmates to curriculum completion. Similarly, it was with humility and composure that the scholars also took on the challenging questions and remarks from students who often posed difficult and confronting issues that allowed the researcher to see that being a scholar is more than just about being a font of knowledge. The scholars in turn posed their own questions to students which often needed unwrapping and de-layering before being understood. It was this type of practice that the researcher found rewarding as though it sometimes felt like a waste of time in terms of question deconstruction. However, it was this process that eventually rewarded the researcher as through the de-layering process, learning was achieved.

As a scholar the researcher has not necessarily adopted such a complex de-layering practice as the time constraints of corporate training does not permit such practice. What the researcher has been able to do as a scholar is use his knowledge in a way that is not so much pontificating wisdom, imposing it onto others but more along the lines of the university scholar posing a sense of question. This posing question practice has for some reason tapped into an uncertainty of facts and insecurity in many people, which the researcher uses as a means of getting them to consider their view as being not always as comprehensive as it could be. In short there is no easy route to being a scholar when dealing with any subject. What the researcher has achieved however is that as a scholar it is his responsibility to provide not so much answers but facilitate the path for those who are asking the question to unravel their own answers in their own way. This also shows the educational equality the researcher previously discussed in having respect for identity and the way individuals learn. This has not always been easy to do particularly with mature adults facing corporate and time pressures (though

the researcher has persisted), however, as a scholar to his own sons the researcher has been able to use this to a great extent which is discussed further within his role as a father.

Father

There is no doubting the huge influence the study has had on this role in terms of being a father who also plays scholar, mentor, practitioner and adult carer to two developing boys of 11 and 13 years. This role is closely tied to the idea of a subtle guide as previously discussed under the scholar heading. The greatest take-away the researcher has managed to determine from his study in terms of being a father is that of being a responsible mentor. Over the years in completing his study the researcher mentored his sons teaching them the art of research and then adding to this further through topical discussions on a range of areas including:

- objectivity vs subjectivity;
- is maths truly the only objective science;
- what is science and what is media vs science;
- identity, culture, respect and tolerance; and
- ongoing learning.

This led the researcher to physically take his sons to visit and experience situations such as:

- countries to explore different identities, histories and cultures;
- sciences like the arts to comprehend art, theatre, music and more;
- people to see debaters, poets, politicians and more; and
- community through church, community work and more to comprehend the importance that spiritual growth is critical.

The researcher is hopeful he has instilled in his sons the Socratic concept:

The more I learn, the more I learn how little I know.

(Socrates - 470 BC – 399 BC)

Though previously never seeing his children as being educational practitioners, the researcher's study gave him a new lens to realise that to a great extent everyone in

society is an educational practitioner to some degree. This became more evident in the way that the researcher saw his sons teach other people from as young as their little cousin to as old as their grandparents. The researcher noticed a healthy respect that his sons have in being able to listen and take in another person's perspective and then to use this in the learning they are providing. The researcher's realisation that his sons are practitioners was even more evident in the way they worked with others in their school project based teams where they needed to motivate others to work and do well as a group. This allowed the researcher to realise that through osmosis from father to son, his son's roles as practitioners' stems from his own.

The researcher realises that the study has also demonstrated to his boys that education is an ongoing lifelong and life wide practice. Just as importantly, his boys have learnt something about education which the researcher still grapples with which is that it is "*OK*" to take time off from work to devote yourself to something as important as study, as they have seen the researcher resign from work and similarly take up studying at the library and at home seven days a week to complete the last part of his doctoral studies.

Son

There is little doubt that the researchers role as a son as a result of this study has considerably changed. The view the researcher had of his parents prior to the study was that of immigrants, who no doubt gave up much to come to Australia. What the researcher did not understand is how much his parents gave up once they arrived in Australia.

Amid the racial hardship of being a dark man in a white land in Australia in the late 1960s as well as the social intolerance of being married to a white woman, the researcher realises now that both his father and mother gave up more in Australia than they gave up to initially come here. Whilst both the researcher's parent's identities and cultures were forsaken, one could think they could maintain some of their traditions and practices in the privacy of their home. However, both the researcher's parents not only faced rejection of their identities by the new world they faced outside but also by their sons inside their own home who were not going

to take part or tolerate what they incorrectly and immaturely saw as old-world archaic and alien practices. The immaturity of youth saw the researcher and his brother, disown their heritage and as a result extinguish the final embers of identity and culture that the researcher's parents had tried to hold on to and maintain in a new land. By doing so the researcher's parents adopted the ways of the new Australian world and in so doing – not through any fault of their own – whitewashed their own culture and heritage.

The realisation of this *whitewash* stirred the researcher to write a letter to his parents to thank them for all that they had done as immigrants and moved him to provide a place in history for his parents by engraving their names on a Welcome Wall at a ceremony in their hometown of Sydney. Such small acts of thanks will never make up for the inability of children who were too immature to accept even a little of their parent's past identity and culture. The remaining question to this day which as a son the researcher will not raise for fear of *awakening sleeping dogs* is whether his parents realise how much they gave up of themselves in Australia because of their sons. The researcher's appetite to discover these findings is great, but not as great as his role as a son not to distress his parents.

Husband

The study has highlighted for the researcher that there can be equilibrium to the role that not only shares the load of parenting but also provides a greater level of support as a partner. As can be seen through the previously discussed father role, this has seen the researcher become more involved as a parent, but similarly there is more to being a husband than this.

The study has given the researcher a greater appreciation of understanding why his wife thinks differently – being from a different culture – but also for realising that her identity has no reason and need to not have one either. As the researcher has come to realise that there is nothing to be understood (as previously mentioned there are no absolute right and wrongs only perceptions) similarly he has achieved a higher level of marital harmony. This also comes through a healthy respect and appreciation of the differences he shares with his wife which allows

him to view the world from a perspective beyond his own set of lenses. The researcher has drawn upon these lenses to try and comprehend how others may also see and view the world of his area of study. In asking questions and seeking clarity on his wife's views the researcher has gained a much greater insight into the meaning of multi-cultures and multi-identities. This has led the researcher to copying similar practices for his study which was again of great help in comprehending identity and culture with his work participants and colleagues.

The study has in-turn provided a greater level of tolerance for the researcher which has flowed on to make for a more stable relationship as a husband with his wife. Similarly, and in no way being derogatory, with his partner approaching the mid 40s the researcher has also gained a greater insight into mid-life change and other stages that a change of life brings on with some people and so has similarly learnt tolerance and understanding along with the support that is needed to help partners cope. The study has provided not only a level of support and understanding to the researcher's wife, but possibly more importantly a greater level of coping mechanisms to the husband that assists him to respect a partner's identity which is susceptible to change through different stages of life.

As an Adult

This study has exposed traits and characteristics about the researcher's own knowledge – or lack of – that hopefully demonstrates to other researcher's that their own research study may not only provide *learning*'s regarding their operational domain but also *learning*'s about themselves which they will need to face and deal with. To set out the solutions for such revelations as described within this section is not within the scope of this study. What can be stated though is that the researcher's original hunch has been far exceeded by the research findings. It is hoped others replicate the study (and improve on it) to uncover further revelations regarding corporate education, practice and perhaps themselves whether as practitioner, scholar, researcher or hopefully a combination of all thereby perhaps most importantly becoming a better adult.

My Growth - Hopes and Dreams

The researcher at the outset of his research had many hopes and dreams with the underpinning one being to make a difference to adult education practice within corporate education. Little more than this was ever expected nor ever investigated until the literature review began raising more and more questions in the researchers mind and similarly led him to explore various avenues within his own field but also avenues that linked to other non educational fields. It was through these literature reviews and then by attending conferences and workshops that the researcher was able to broaden his world and widen the opportunity for his research which he hopes can be of use in assisting other scholars and practitioners. The researcher has divided what he hopes and dreams others may get from the study into Reflecting on Practice; and Reflecting beyond Practice.

Reflecting on Practice

Reflections on practice at both a research level and field level will hopefully assist fellow researchers to move forward by again providing a template to follow.

In regards to practice at a research level the researcher found through first-hand experience just how difficult it is to move into research practices as there is in some cases confusion within the research community on what constitutes appropriate methodology when conducting research. Fortunately this researcher had a helpful advisor who assisted in the demystification of methodology, however, this does not excuse the need for scholars to make it simpler for practitioners looking to embark upon research. Furthermore, it is important for scholars to engage with practitioners on research as failure to do so may see both end up working separately and possibly eventually parting ways. If there was such a parting of ways the effects to both would be devastating – loss of new ideas, methods, approaches, practices and more. This in turn would also lead to the greatest loss of all which would ultimately be to the learners.

In regards to practice at a field level the researcher found that the evaluation process within the field of practice needs to be able to look at a wider sphere of results. A wealth of advancement is taking place within other fields that are

broadening their evaluations to identify not only the direct relevance of outputs but also the indirect offshoots that may occur. Benchmarking and best practicing from other fields may be a first step towards developing a wider sphere of research in this area.

Reflecting Beyond Practice

When looking within the field of his study, the researcher reviewed not only past papers from the field of educational research but he also reviewed themes and ideas from non educational sectors. The more the researcher identified the value of this study in his own realm of personal expertise the more he also identified possibilities for his study branching into other fields of study.

A trip to the United Nations (UN) in New York provided the ultimate impetus for the researcher to recognise that his studies had the potential to not only provide opportunity for future research studies in the corporate and other education sectors but also across such areas as health, politics, science, peace negotiations and indeed any situation where more than one identity or culture interacts with another. It is not suffice to state that Third Space alone provides this, as the researcher realised in reading papers from the United Nations that there is more to success than the potential that the Third Space has to offer. What the researcher did identify whilst at the United Nations, and later reading United Nations documents, is the need for greater preparation and explanation when it comes to understanding identities and cultures. Tolerance alone is not enough to ensure progress, but a greater comprehension of identity and culture coupled with tolerance, Third Space and more perhaps is.

What must be done in terms of future research studies is to make education an example of how a model can work across identities and cultures and then replicate this to an extent where it becomes recognised as best practice across the education realm. Once this is completed it is then important to take the next step with further future research studies extrapolating the items that can be transferred beyond education and across to other fields such as politics and negotiations. Once this is done we can begin to conduct more research studies across identities and cultures

in each field to identify guidelines and templates that make today's issues in politics, negotiations and other sectors not necessarily easier to work within but at least taking a more pluralistic approach.

It is only through a rigorous dialectical approach that we can hope to go beyond the realms of education – to other fields which directly impact education – to be able to move away from the current unilateral decisions and imperialistic approaches that still govern many aspects of education, politics, international negotiations, health, science and more. Considering the path taken to date has not always been successful, it could be said that failure to explore options that adopt a more encompassing approach may in the future not be seen by the worldly and technologically savvy masses to be sufficient. They may even lead (as previously mentioned) to revolutions not only in education but possibly in other fields. There is a need to move towards building more encompassing solutions. The researcher through this document has taken a step towards this with his research question and secondly by constructing his thesis document in a format that other scholars and practitioners can review and possibly use as a guide.

Chapter Summary

This section provides a review of the chapter but also draws the chapter and the study to a close. The findings and conclusions from this study needs to be reviewed through the lens of similar studies, which researchers can now approach using the current study as a template. This will not only possibly assist in validating this research study but should also improve practice and develop further sets of conclusions for practitioners to consider. The implication is that the study gives the researcher a platform to demonstrate further inferences, which practitioners cannot afford to ignore. In particular, the existing lack of pluralism, that some corporations practice, may well see their executive head office relevance diminish and possibly vanish due to the irrelevancy of the corporate message at national and local levels. Similarly, the power distance relationships also highlight the lack of empowerment that some sectors of organisations are given or indeed take.

There were two defining points that the researcher was not only amazed to unravel but equally enthused to discover. The first of these revelations was the realisation that a revolution in education will likely occur as learners become fully aware of the loss of their identity through work homogenisation expanding to fill their home and personal life and as they call upon corporations to change or, as a result of not doing so, lose valuable talent. The second of these was how the study's outcomes and conclusions potentially lend themselves to the broader fields of health, politics, science and so on thereby transcending the researcher's original aims and providing a greater set of possibilities for future research. The researcher is equally motivated and enthused to open a new chapter of study – post this professional doctorate – to begin to work on such implications.

Upon further reflection it is clearly highlighted that the researcher needs to replicate his study using further modules and programmes to compare, contrast and identify common items and elements that may not only validate existing claims but also improve the standard of the guide/template which practitioners can follow and use in their own practice based research. The researcher also calls for a review of constructs, particularly by corporations as their current practices, procedures and behaviour is in some cases detrimental not only to their prime aim – making profits – but also to their survival. Similarly, the researcher recommends that practitioners look to their approach to practice as they are also potentially losing ground with learners (and with their own integrity) by focussing on roles rather than learners.

There are a number of recommendations relating to research, scholars and the current state of the Professional Doctorate stressing the need to establish a better educational practice that is not merely a scaled down version of the PhD format. In saying this, the researcher equally appreciates the strengths of the current format including the critical role that the advisor plays in assisting and guiding the researcher. This cannot be undervalued.

A Final Note

How the researcher started with the hope of solving a problem is how he also finishes. The researcher ends his current research with a hope of providing some

solutions through his study but more so with raising questions and aspirations based on his example so that others will use his work to solve and hope for developments in their own work. The only remaining comments to be made as a researcher are in regards to the study and the change it produced in his practice along with the journey it took him through and the next steps he aims to take.

The journey that the researcher has taken with this study is not to be undervalued as it has been through the journey that the researcher has been able to transform and view his practice through various lenses and hence been able to correct his own lens. The lens that the researcher now uses is not complete in any way, but it has been not only widened but deepened in a way that will impact his practice. The journey has shown the researcher that whilst there is no right or wrong or truth in practice there must be an evolution that allows practitioners to ever look for greater comprehension and understanding of difference and to seek a pluralism that can come from a dialectical approach. Such a process can only improve practice. Similarly it is also important to state that whilst this study has come to an end for the case of this professional doctorate document the researcher has further steps which he aims to take in refining the study for other educational fields, to adopt and use and examine best practices from other fields, and return to his field to further improve his own field of practice.

The researcher understands there is no panacea but also believes it is only through a dialectical approach – working with other practitioners in other fields – that he can similarly return to his field having shared what he believes is educational best practice with others and returning with new methods that he has gained similarly from their perspectives and practices. This view was gained in the researcher's doctoral course sessions where it was explained that completing a professional doctorate was often about "*standing on the shoulders of others*". The researcher hopes his study may be something that in time others can "*stand upon*" as well.

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APPENDICES

Appendix A – Letter of Introduction to Subjects

Appendix B – Consent Forms

Appendix C – Observation Sheet

Appendix D - Questionnaire/Focus Group Questions

Appendix E – Content Analysis Approach

Appendix F – List of Diagrams and Tables

Appendix A – Letter of Introduction to Subjects

University of Technology Sydney INVITATION TO PARTICIPATE LETTER

Dear _____

My name is Brian Cooper and I am a doctoral candidate in the Faculty of Arts and Social Sciences, University of Technology Sydney. I am conducting a research study as part of the requirements for my degree in Education, and I would like to invite you to participate.

This study is supported by the (Company Name). My study will investigate the (Company Name) technical leadership education programme where global corporate identity and local organisational culture blend with country specific cultures and individual employee identity.

If you decide to participate, you will be asked to meet with me for an interview about the (Course Name), which you recently attended. In particular, we will discuss the course, topics and approach used during the course and whether they were suited to your working, learning and cultural style.

The meeting will take place at a mutually agreed upon time and place, and should last about 60 minutes. The session will be audio taped so that I can accurately reflect on what is discussed. The tapes will only be heard by the researcher (i.e. me) who will then transcribe and analyze them in an anonymous way so as not to identify any individual. Finally the audio will be destroyed and the transcripts of the interview will be securely archived as part of the research process.

You do not have to answer any questions that you do not wish to answer. Although you probably won't benefit directly from participating in this study, we hope that others who will take part in future training programmes will benefit.

Participation is confidential. Research information will be kept in a secure location. The results of the study may be published or presented at professional meetings, but your identity will not be known (as transcripts will be made anonymously) or revealed.

Confidentiality of your responses will be maintained as no one except you and I will know what your answers are.

Choosing to take part in the study is your decision. You do not have to participate in this study if you do not want to be involved. You may also withdraw from the study at any time or decide not to answer any question that you are not comfortable answering.

Thank you for your consideration and I am happy to answer any questions you have about the study. If you do have questions or would like to participate, please contact me directly at brian.cooper@student.uts.edu.au

Best Regards,
Brian Cooper

NOTE:

This study has been approved by the University of Technology, Sydney Human Research Ethics Committee. If you have any complaints or reservations about any aspect of your participation in this research which you cannot resolve with the researcher, you may contact the Ethics Committee through the Research Ethics Officer (ph: 02 9514 9615, Research.Ethics@uts.edu.au) and quote the UTS HREC reference number. Any complaint you make will be treated in confidence and investigated fully and you will be informed of the outcome

Appendix B – Consent Forms

Once the “Letter of Introduction to Subjects” were sent out then “Consent Forms” were similarly issued, signed and received. These consent forms have been *withheld so as not to identify any company or individuals. Please refer to below footnote for further information.

Footnote:

* When the researcher commenced his study and investigation he was employed by Company X which was supportive. Unfortunately later, largely as a result of the Global Financial Crisis the researcher’s role was declared redundant and as a result the researcher was retrenched. Therefore, the researcher believes that it is no longer appropriate to identify the company or any individuals involved and has applied a de-identification process and generic naming approach to the study.

Appendix C – Observation Sheet

This template is to be used as a guide when performing observations for research study. It can be updated to include further points that the observer may identify as relevant and therefore should be included for the research. Though the word “describe” is used below, as an observer we are not looking for a recount or retelling of what went on but more a description of what worked, did not work, what were highlights and low-lights as well as any other noticeable moments which you as a practitioner-researcher felt should be described.

Pre-Cursor

- Is the observed person ready for the events about to occur?
- Describe the preparation that is evident?
- Describe what further preparation looks noticeably missing?

General Opening

- Describe the opening/start of the event?
- Was there sufficient introduction to the event/topic?
- How many people were involved overall?
- Describe what the people involved reactions to the opening was like?

Research Points

- Describe the reaction people had to the items identified covering :
 - Key Concepts
 - Relationships
 - Networks
 - Ideas
 - Themes
- Describe the trainers approach and reactions as he taught the items to participants?
- Describe the types of questions that arose from the items?
- Was there adequate time and space given for participants to review and check meanings and/or ask questions?

- What was the participant's reaction to the items? (resistance, uncertainty, support etc)

Cultural Effects

- Describe any national, local, occupational or other cultural issues which may have arisen whilst the trainer was working through the module?
 - Were there any issues in relation to:
 - Power Distance
 - Individualism vs. Collectivism
 - Masculinity vs. Femininity
 - Uncertainty Avoidance
 - Long Term Orientation
- (Note: The above were previously explained to you at the research session)

Summary

- How would you best summarise the event?
- Are there any further comments or remarks and if so please include?

Appendix D – Questionnaire/Focus Group Questions

This template is to be used in discussion with the researcher and the group through a semi-structured interview process.

- What are your initial interpretations of the course?
- What are your initial interpretations of the particular course module?
- What do you feel was the objective of the module?
- What terms/processes within the module make sense?
- What terms/processes within the module did not make sense?
- What terms/processes or parts of the module would not work within a facility in a Spanish setting? In an English-speaking facility setting?

(Note: For Questions 4-6 allow participant to answer and then link in the items drawn from the content analysis stage covering Key Concepts, Relationships, Networks, Ideas and Themes.)

- If you were to train this module in its current format would you modify it?
- What parts would you leave in and what parts would you take out?
- How much consultation do you normally receive and what level of involvement are you given in developing modules and courses such as this?
- What cultural issues does a module/course like this present?
- Did the module provide any benefit or usefulness in improving your knowledge, skills or competence as a practitioner? If so how?
- Any other comments you would like to make?

Appendix E – Content Analysis Approach

Data collected for Content Analysis was collected using both a conceptual and a relational process, as described below.

Conceptual/Manifest Process

A conceptual process will initially be taken to identify existence and frequency of Concepts (Explicit and Implicit) through the following actions.

- 1.) Ensure the research questions and ensuing questions are defined.
- 2.) Select the sample group from the universe to be sampled from using a purposive/judgmental stratified sampling approach. As I may decide to also study a course through observation I will need to identify what will be the period, number of days that this will take. Based on all of these criteria I will then create the sample framework.
- 3.) As my research will need to be not only understood but duplicated by others I will need to develop a set of explicit “Conceptual Data Coding and Recording Instructions”. These instructions will then allow outside coders to be trained – as part of my train the research trainer – so that reliability, stability and reproducibility requirements are met. (There is a need to consider using Jacob Cohen’s Kappa scale (1960).)
- 4.) I need to determine if I code for single words or sets of words. When coding consideration also needs to be made as to whether I will frame this as physical in terms of course and programme and/or as referential in terms of attitudes, values and preferences that I am aiming to attain.
- 5.) My plan is to then code the text using the Interactive/Emergent process. If a relevant “Priori code” exists then I shall also draw upon this.
- 6.) The process of coding will consist of two reviews.
 - a. 1st Review of the text will be for Existence.
 - b. 2nd Review of the text will be for Frequency and for a Key Word In Context (KWIC) search to test for the consistency of usage of words.

- 7.) When coding, any generalisations I come across need to be coded appropriately and guidelines for doing this added to the “Coding and Recording Instructions”.
- 8.) When coding there will be a need to develop translation rules to code with for consistency and again these need to be added to the “Coding and Recording Instructions”.
- 9.) At this stage I plan to ignore any irrelevant/left over text.
- 10.) I will need to determine whether I will manually or computer code the text.
 - a. If manually I need to allow plenty of time.
 - b. If computer then I need to ensure thorough category preparation and watch out for synonyms and homonyms.
- 11.) Finally I need to analyse the findings.
 - a. Draw conclusions and generalisations
 - b. Identify Trends

Once this conceptual process has been completed to collect data in an initial primary stage I plan to perform a similar relational process to collect data and transform it into a final format ready to be used for analysis.

Relational/Latent Process

The relational process continues on from the conceptual process, and is specifically brought in to identify a further set of data by recognising relationships through the following actions:

- 12.) Employ the same questions and sample from the Conceptual Process.
- 13.) As my research will need to be not only understood but duplicated by others I will need to develop a set of explicit “Relational Data Coding and Recording Instructions”. These instructions will then allow outside coders to be trained – as part of my train the research trainer – so that reliability, stability and reproducibility requirements are met.
- 14.) I then need to identify the types of data relationships that I want to examine for my research
 - a. Aiming to use a Cognitive Science Approach

- b. Aiming to use a Mental Model Approach
- 15.) The Level of Analysis needs to be determined with single words or sets of words (as per Stage 1 Conceptual the same words can be used)
- 16.) Reduce the texts to categories (Variables used to study the text) and code for:
 - a. Existence
 - b. Frequency

"A category is a group of words with similar meaning or connotations"
 (Weber, 1990, p. 37)

I may create the categories of “organisational” and “local” for characterising training course/programme data. When assigning values to these I need to ensure I set up a system that demonstrates my coding decision numerically example 1= very organisational, 2 = moderately organisational, 3= in between, 4 = moderately local and 5= very local.

When coding, it is also imperative to identify the operational base. So identifying the number in total – whether organisational, local or no apparent orientation – the full number of items acting as the base are important to declare.

"Categories must be mutually exclusive and exhaustive"
 (General Accounting Office, 1989, p. 20)

“Mutually exclusive categories exist when no unit falls between two data points, and each unit is represented by only one data point. The requirement of exhaustive categories is met when the data language represents all recording units without exception”. (Stemler,2001,p.3)

As the above points indicate I need to ensure I take a mutually exclusive and exhaustive approach with my data categorisation.

- 17.) Exploring the relationships between the concepts in terms of:
 - a. Strength of Relationship – degree of word relationship e.g. Use of “maybe”
 - b. Sign of Relationship – identifying concepts both positive and negative e.g. Bull and Market is Positive whilst Bear and Market is Negative
 - c. Direction of the Relationship – recognising the type of relationship categories display e.g. X and Y or X because of Y or if X then no Y
- 18.) Code the actual relationships – This is the action time to code the actual data relationships.
- 19.) Perform statistical analysis of the data that has been coded looking for
 - a. Relationships for the variables I have identified
 - b. Differences for the variables I have identified
- 20.) Map the representations of the concepts and their associations.

Appendix F – List of Diagrams and Tables

Diagram A – The Study’s Location.....	31
Table 1 – Key References.....	38
Diagram B - Situating the Research	57
Diagram C – The Approach	77
Diagram D – Method Diagram.....	80
Table 2 – Key Word in Context.....	99
Table 3 – Categorising, Coding and Valuing	105
Diagram E - Coding and Mapping Relationships (for Variations and Differences).....	108
Table 4 – Trainer Uncertainty.....	118
Table 5 – Content Analysis Stage 2	123