Learning in-between, across and beyond workplace boundaries

Mary C. Johnsson*, David Boud and Nicky Solomon

Faculty of Arts and Social Sciences
University of Technology, Sydney
P.O. Box 123
Broadway, NSW 2007
Australia
E-mail: mary.johnsson@uts.edu.au
E-mail: david.boud@uts.edu.au
E-mail: nicky.solomon@uts.edu.au
*Corresponding author

Abstract: In this paper, we challenge conventional theories underpinning the practice of human resource development (HRD) that typically focus on the objects of learning – individuals, skills, jobs – or separate the contexts of work (performance) from learning (training). Using case study research from a public utility and a winery, we found similarities in workers' experience of various organisational practices despite different objects of learning. These practices were, firstly, temporarily occupying (acting up) in a more senior position and, secondly, collaborating across functions. Unlike notions of boundary-crossing or job rotation, we argue that learning 'in-between' develops interactional competence that is grounded within the work practices of interacting individuals. This relational view opens up possibilities for redirecting the focus of HRD practice towards integrating work and learning in ways that develop the potential for learning in-between, across and beyond the boundaries of work.

Keywords: workplace learning; job boundaries; functional boundaries; boundary crossing; acting up; human resource development; HRD practice; learning spaces; organisational practices; relational interactions.


Biographical notes: Mary Johnsson is an early career researcher, previously a manager and consultant with several multinational organisations. David Boud is Professor of Adult Education and Senior Fellow at the Australian Learning and Teaching Council. Nicky Solomon is Professor of Education and currently Dean of the University Graduate School.

1 Introduction

A common definition of ‘boundary’ is the demarcation of a place, domain or territory within which the subject of focus can be said to be contained or connected. Boundaries usefully delimit what is of interest, but they can also restrain and constrain in literal and conceptual ways. In the domain of workplace learning research, the notion of the workplace as a spatial and particular context for learning has led to the useful development of situated theories of learning (Lave and Wenger, 1991; Rainbird, Fuller and Munro, 2004). These theories recognise the workplace as a
distinct learning site separate in characteristics and influences from familiar educational contexts. One implication is that human resource development (HRD) practice in workplaces is evolving from education and skills-based approaches grounded in training to striving for more strategic impact across the entire organisation (Garavan, 2007; Keefer and Yap, 2007).

A contemporary focus in workplace learning research is to theorise the notion of ‘boundary-crossing’ as a mechanism to exploit learning opportunities for innovation, managing diversity or identity formation (Raven and Verbong, 2009; Tanggaard, 2007; Weber, 2003). We suggest that despite using a label that infers change through movement, boundary-crossing research continues to reinforce existing conceptual boundaries. This is often the case particularly when the focus is on the objects of learning – such as, for example, individuals, jobs, activities, outcomes – rather than the relations and the spaces that construct learning as an emergent and relational phenomenon. Through the empirical lens of recent Australian research conducted at two organisations, Utility and Winery, we discuss some new understandings of learning at work that are illustrated by these investigations. We draw implications for how these understandings of learning may offer new possibilities for how HRD practice can facilitate learning. We conclude by suggesting that the notion of boundaries is a metaphoric device that restricts expansive understandings of workplace learning and inhibits creative ways of considering other possibilities.

2 Reinforcing boundaries to workplace learning research or bounding ahead?

2.1 Replicating the binds of educational transfer
The impact of workplace learning research is complicated by continuing debate about what constitutes learning; that is, who learns and in what ways learning can be recognised or fostered. Learning is ambiguously and ‘commonly employed in both a task sense and an achievement sense’ (Hager, 2001, p.352) covering both processes and outcomes of learning. As we see it, an early concern has been the difficulty in theorising the situated nature of the workplace and what it means to acknowledge the workplace as an authentic site of learning in its own right. Learning has been associated with forms of knowledge originating in educational contexts, not with what is required for work. This has simultaneously highlighted the separation yet linkage between education and work through a shared, but ambiguous, notion of learning. This connection has been used by researchers to bridge the two contexts using terminological and conceptual means. For example, Billett (2001a, 2002, 2006) uses familiar educational terms to identify the value of workplace pedagogy, workplace curricula and ‘learning guides that can result in improved workplace learning’ (Billett, 2001a, p.213).

Under the banner of learning, connecting what is learned in places of education to places of work, has generated a significant volume of research focusing on how the instrumental value of knowledge (what is learned) can be cognitively acquired or transferred (how it is learned) by people (individuals who learn) to and for organisational settings (Davenport and Prusak, 2000; Eraut, 2004; Tuomi-Gröhn and Engeström, 2003). This particular view of learning privileges the individual learner who acquires propositional or skill-based knowledge, a view still considered to be the ‘standard paradigm of learning’ (Beckett and Hager, 2002, p.96). This orientation continues to pervade outcome-based understandings of competency-based education
(Hager, 2004), competency-based training (Mulcahy and James, 2000) and it challenges whether the field of HRD is ‘synonymous with or different from training’ (Ruona, Lynham and Chermack, 2003, p.279).

At the same time, over the last several decades, research on the various forms and appearances of workplace learning has expanded to include informal, context-sensitive manifestations of learning such as everyday practices (Beckett and Hager, 2002; Colley, Hodkinson and Malcolm, 2003; Hager and Halliday, 2006; Solomon, Boud and Rooney, 2006), incidental and tacit learning (Marsick and Watkins, 1990; Winch, 1998), working with others (Boud, Cressey and Docherty, 2006; Garavan and McCarthy, 2008; Sessa and London, 2008) and working in communities of practice (Boud and Middleton, 2003; Handley et al., 2006; Lave and Wenger, 1991). In particular, research literature on communities of practice has positioned learning as a social participatory process that challenges cognitive views of learning as knowledge embedded in individual minds. Usefully, contemporary organisations are being recognised as particular sites of learning that are shaped by local social, cultural and discursive factors that condition affordances for individuals, groups and organisations to learn (Billett, 2001b; Sandberg and Targama, 2007). In other words, workplaces are not only experienced as sites of learning but are also understood as complex combinations of local circumstances where workers must adapt and coordinate numerous practices to achieve everyday organisational outcomes (Schatzki, 2006).

These developments have resulted in very different understandings of learning that Hager and Hodkinson (2009, pp.622–627) call different conceptual lenses. For example, the propositional or skill lens conceptualises learning as a knowledge product or skill that is transferred from one place to another or from an earlier time to a later time independent of the individual learner and the particularities of the local context. Another lens is the participatory lens that conceptualises learning as a socially constructed and context-sensitive phenomenon that subsumes the individual so that learning and learners change as contexts change. We characterise current boundary-crossing research as attempting to straddle aspects of both the product-oriented and process-oriented lenses in ways that reinforce the limitations of original conceptual boundaries.

2.2 Boundary-crossing: The new transfer?

In many work contexts, the term ‘transfer’ has been replaced by another metaphor, ‘boundary-crossing’ (Kerosuo and Engeström, 2003; Nielsen, 2009; Tanggaard, 2007; Tuomi-Gröhn and Engeström, 2003). In research literature, there are various interpretations of what boundary crossing means for theories of workplace learning. First, boundary-crossing is literally described as a way to traverse from one context (school) to another (work) as a metaphor for newly-entering practitioners (e.g. Tanggaard, 2007) in similar ways to Lave and Wenger’s (1991) original communities of practice research. This view tends to reinforce learning as a linear progressive process of replicating knowledge through guided support from experts. As Bransford and Schwartz (1999) have previously argued, learning should not be understood as primarily a process of replicative transfer. Rather theorisations of learning need to account for how people are able to build upon their prior experiences or knowledge to act in new ways that are individually and collectively interpreted as relevant to their current contexts.

Second, boundary-crossing is also described as a process of ‘encountering difference … [requiring] significant cognitive retooling’ (Tuomi-Gröhn, Engeström and Young, 2003, p.4). This suggests that during work encounters, there may be
‘ruptures emerging in inter-subjective interaction’ (Engeström, cited in Kerosuo and Engeström, 2003, p.349). These ruptures are differences in perspectives or ways of working that continually throw up considerations for negotiating or changing work practices. The conceptual framework from which the majority of empirical boundary crossing research derives is cultural-historical activity theory (Vygotsky, 1978). Under this framework, an activity system comprises subjects, objects, rules and relations where there is an assumption of internal coherence and desired alignment among components of the system (Engeström, 2001). When tensions or contradictions arise within an activity system or across competing activity systems, there is the need for subjects to cognitively cross the boundaries of activity systems to resolve these tensions from which learning emerges.

We believe that current boundary-crossing literature highlights the importance of encountering difference and starts to unpack the complexity of learning in ways that have implications for changing HRD practice (Lee, 2003). However the strength of this theoretical gain in some ways needs to be qualified by the conceptual limitations of the borders it attempts to cross. This literature draws from assumptions of movement in recognising the dynamics of learning but not from assumptions of ongoing change. For example, transfer theories often attempt to redress a deficit view of learning where to be named a learner at work is to admit to less than the desirable target level of competence (Boud and Solomon, 2003), for example, in standard notions of novices becoming competent or expert practitioners. In analogous ways, a boundary-crossing view assumes that tensions and contradictions in institutional activity systems are undesirable and should be resolved towards a goal of stability or coherence. We join other researchers (e.g. Schatzki, 2006; Tsoukas and Chia, 2002) who consider change in organisations as an ongoing unfolding process of organising in which periods of stability are fleeting and provisional phenomena rather than the norm for organisational work. This alternative conceptualisation suggests that learning might be better understood as embedded in becoming (Clegg, Kornberger and Rhodes, 2005; Tsoukas and Chia, 2002) or transforming during transition (Hager and Hodkinson, 2009, pp.627–629). Both views embrace learning as irrevocable change and identity transformation that is not captured in conventional notions of practitioners socially participating in a community or activity system.

This alternative conceptualisation suggests learning as a dynamic and complex phenomenon that requires attention to the holistic and relational aspects of human processes (Lee, 2007). It cannot be simply explained as developing additional individual learner capabilities to ‘cognitively retool’ (Tuomi-Gröhn, Engeström and Young, 2003, p.4) as if such acts can function like mental on/off switches. We believe this phenomenon is interactively constructed using a complex combination of social, discursive and contextual factors that cannot be predicted in advance nor explained in terms of individual motivations or agency. We illustrate our assertions by discussing research findings from two organisations in the next section.

3 Hard hats and wine bottles: Researching learning in two diverse organisations

3.1 Methodology and research sites
As part of a project researching new manifestations of workplace learning, we have investigated how learning is often unaccredited, and sometimes unacknowledged,
when it is embedded and integrated within work. Specifically, we have analysed the characteristics and conditions under which organisational practices designed for work and performed for the achievement of organisational goals can also provide opportunities for the learning and development of individuals and the organisation. Such organisational practices typically include induction processes, performance appraisals, work continuity practices and safety practices that are common across many different organisations. Our project targeted Australian organisations where the performance of work and outcomes was supported by the existence of a rich, diverse and often documented set of organisational practices. In contrast to a direct focus on learning or learners, this orientation allowed us to first, surface worker and organisational understandings of work and work practices; and second, to probe how these understandings influence the ways workers perform their work practices, describe their work roles and identities or lead to the ways they learn.

We utilised case study methodology (Yin, 2003) to generate in-depth understandings of workers’ experiences of organisational practices. These experiences were constructed by combining various qualitative data collection methods. First, we observed workers performing their daily jobs as individuals or members of work teams and documented these observations through researcher field notes. Second, we gathered workers’ stories about their experiences of work and learning through semi-structured interviews and took particular note of how workers described and contextualised what was relevant in these experiences. Third, we reviewed how work policies were instantiated in material ways through various organisational documents, for example, job descriptions, performance appraisal forms and safety compliance forms. We noted how these documents were used ‘in practice’ during our observations and probed their purpose and use during interviews with participants. This triangulation and combination of research methods allowed us to investigate how organisational practices are practically ‘lived and experienced’ through the everyday actions and talk of workers and supported by the material instantiations of organisational policies and goals.

Managers in our case organisations authorised access to work sites where work performance could be observed by the researchers. Participants volunteered to share their perspectives through a process of informed consent with each participant interviewed by a team of at least two researchers. All interviews were digitally recorded, professionally transcribed and reviewed by the interviewing researchers as well as others in the research team. For each case study organisation, we generated a written research report that provided an additional opportunity to confirm and refine our inductive analyses and findings. All names of organisations and participants used in this paper are pseudonyms.

The first case organisation, *Utility*, is a state-owned public utility that provides energy infrastructure and customer services for the outer suburbs of a major city and neighbouring regional areas. The organisation employs over 2,500 employees across three regions. We focused on one of these regions and researched the work and learning practices of a cross-section of two operational and three support units. Each unit performed distinct functions that coordinate to provide integrated services to customers. These functions included construction and maintenance, project management, administration, depot support and customer relations. At *Utility*, we conducted 20 hours of site observations and researched the experiences of 36 workers across various hierarchical levels and functions.

The second case organisation, *Winery*, is a privately held medium-size boutique winery that produces a range of premium red and white wines for the upper-
end of the consumer market. It has fifty employees who work full-time, part-time or on a casual basis, performing functions in the vineyard (vine maintenance and soil science), winemaking, bottling and distribution, cellar door sales and administrative support. Grape picking is a seasonal activity during yearly harvest time and is contracted out to labourers but supervised by Winery staff. At Winery, we conducted 10 hours of site observations and researched the experiences of 17 workers across all winery functions and at management, supervisor and worker levels.

3.2 Findings: Learning in-between job and role boundaries

Most organisations, including Utility and Winery, depend upon work progressing effectively even when responsible individuals take leave, resign or become unavailable. A commonly-used option is to ask a worker to temporarily assume his or her manager’s job; in Australia, this is termed ‘acting up’. This activity is different from job rotation where the worker spends specific, often longer periods of time performing different jobs to achieve broader multiskilling capabilities as part of an individual career development plan or to improve firm performance (Richardson and Teese, 2008). Compare the perspectives of Sam and Owen who perform similar operational jobs in how they perceive the purpose of acting up:

That’s only a caretaker … role so you try and do as good a job as you can, but … you’ve got to hand that back in a week or two or three weeks’ time, so you tend not to get that involved in it because it’s not your baby – Sam, Utility.

They’re going to have to look at what’s happening, go out there and talk to the staff, and do all those other things … because you [are] taken out of your comfort zone … You have to perform, you have to ask the questions, you have to go out and find the things that you need to do. Like, when I turned up in [a depot], [the other person] was still there at the time, but on the first day when I turned up there, one of his kids was sick … so I was there to act up in his role. Didn’t know what I was supposed to be doing; I didn’t even know where his office was. So I was put right out the first day, and then: “Okay, what am I doing here, what am I supposed to be doing?” But you know [it worked out – ] it’s okay – Owen, Utility.

Both Sam and Owen work within the same organisational context and have the same jobs before and after being given the opportunity to act up. Sam is more concerned about acting up so as not to disrupt the incumbent’s prevailing practice upon return. Owen sees the task as initially daunting, but an opportunity to apply existing capabilities within an unfamiliar role context where relationships with other workers already exist (i.e. peer-to-peer) but now need to operate in new and different ways (i.e. manager-to-peer). Through this temporary mantle of authority, their perspectives are altered, guiding how they choose to interpret their manager’s role as well as their own intended and actual impact (e.g. Owen’s comments about ‘you have to go out and find out the things you need to do’). They therefore learn to act, perform and interact with others differently, drawing upon their past experiences and applying judgement to assess what is required for the local circumstances to assure work continuity. Interestingly, neither Sam nor Owen mentioned consulting their managers’ job descriptions to provide guidance as to how to act up in another’s role. Their focus is on talking with, finding out, working with and interacting in practical ways that deliver outcomes – relational mechanisms supported by our separate researcher observations.

Even after the temporary role is terminated, individual experiences and understandings are reshaped in irrevocable ways. For example, Owen goes on to
recount how a prior acting up experience of one of his subordinates continues to affect their interpersonal working relationship:

That’s why one of the guys won’t go in there, won’t act up for me anymore, because he just didn’t like: one, the office environment, and he just didn’t handle the stress and the pressures of it all … He … saw what I actually did … [rather than his perceptions of me sitting] around drinking coffee all day … But when they’re actually in my job, they’d go … how do you end up trying to do this? – Owen, Utility.

Providing the opportunity for a subordinate to act up from a manager’s perspective can also change the manager’s own perceptions about what it is now possible to consider from an individual development perspective as well as for the broader benefit of the organisation. For example, Jeff and Mitch from Winery observe:

If I give Sue [the opportunity and information to act up], that gives me an opportunity to go and find more information for myself. So by handing over understanding, it frees me up to understand more. So that’s a really critical thing. Obviously as that person grows, I grow as well so that frees me up. So at some stage or another [we discuss] what is the next step for her – Jeff, Winery.

Well, I think now that … Carol’s more involved in other things … as part of the learning process … [and she] has been here for more than a year [she’s] taking on more of the day-to-day stuff. I feel that probably for the first time now, I’m actually been able to take a step back and think more like a [senior manager] now, rather than just remain buried in the detail all the time … So yes, we’re now actually [considering] more developmental type things … [that have been] on the ‘to do’ list for ages but haven’t been urgent … such as the touch screen function for Cellar Door or changing our budgeting process – Mitch, Winery.

How Jeff and Mitch talk about the role and impact of ‘acting up’ does not focus on the value of work continuing without disruption (desirable business outcomes), or even that this is a useful method of training subordinates (skills development). They are commenting more about a notion of relational dependence (MacIntyre, 1999) and the reciprocal development opportunities that this particular activity surfaces for Jeff/Sue and Mitch/Carol as interconnected workers. The focus shifts from typical objects of learning (e.g. what the job is and does to ensure work continuity) to the relations of learning (e.g. how each as individuals who are connected together can see the possibilities for acting individually and collectively).

These organisational examples show that the performance of acting up as an organisational practice can achieve the organisational purpose of work continuity, but the experience of acting up also generates unintended learning effects. Not only is the individual who acts up changed in the process, but interpersonal relations are altered as well as the people or artefacts affected by the change in relations (e.g. power differentials, affective implications or the impact of decisions made on future policies or procedures based on the interactions that occurred). It is the unique combination of the situated context and the irrevocable changes caused by action or decision consequences that distinguishes acting up as a work-as-learning practice (Felstead et al., 2009) in contrast to training programs that focus on learning-work practice.

Acting up is a kind of learning ‘in-between’ because workers are ‘not quite’ in their regular roles and ‘not quite’ in their manager’s roles. They must ensure the designated jobs and activities are performed, yet whilst acting up, workers naturally draw upon their own experiences to interpret situations and to make decisions in ways
that are likely to be different from that of their managers. Creative possibilities emerge through new patterns of relations that are crafted and negotiated (e.g. relating to existing colleagues in new ways during the period of acting up and continuing to interact with others using these new perspectives upon return to original jobs). These resultant changes to the organisation’s contextual configurations create new ‘in-between’ learning spaces (Solomon, Boud and Rooney, 2006) for future development discussions (for example, between Jeff and Sue or between Mitch and Carol) that underlie the more visible everyday organisational objects (e.g. people, jobs, practices, activities) that are explicitly in view.

3.3 Findings: Learning across functional boundaries

Most organisational work involves worker interaction across functions. This is due to the pervasiveness of subject disciplines as the basis for domains of expertise (e.g. commonly in organisations: customer service, marketing, finance, manufacturing, information technology) and the dominance of Weberian organising concepts of bureaucracy valuing specialisation of labour (Weber, 1964). Working cross-functionally can occur by participating in cross-functional teams, for example, performing functional activities that are pre-informed by, and coordinated with, other functional views to achieve a common organisational goal. But whether structured within teams or not, common cross-functional work is often driven by instrumental requirements and self-interests. For example, worker A needs information or action that is the responsibility of worker B in another function because that information or action has some impact on the conditions of worker A’s actions, job, role or responsibility.

In Winery, Mitch needed to learn across functional boundaries when he has to develop an activity-based product costing methodology to allocate operating costs to existing wines. Mitch understands business finance and product costing methods. He does not know winemaking: how wine is produced, fermented or aged. He needs to consult with Jeff, the winemaker, to understand enough about winemaking activities to have a justifiable basis to allocate costs to Winery’s range of products. In his interview, Mitch talks about how his interactions with Jeff helped him to achieve his instrumental requirements and also provided subsequent ways to understand another business function from a changed perspective:

I … spent time talking with [Jeff] about the different processes that were involved because I had to work out on what basis we were going to allocate the costs… it took a while [and consisted of] more informal discussions really … [I got] him to run me through various things and it’d be a matter of going back and forth … to clarify my thinking … so it was part of those discussions and also part of the induction of going around seeing the things … [during] vintage, they often will do a-day-in-the-winery kind of thing.

Researcher: What did you learn about the winemaking process that you wouldn’t have known beforehand?

That I didn’t want to do it [laughs] … there’s an awful lot of cleaning to do with winemaking because you’re always cleaning the pipes once you’ve put the wine through … but I guess I learned that’s the important part of it … the cleanliness and hygiene … because it can affect the wines [and] when you add yeast to the wines for the fermenting process … so that just helps you understand it a bit better [when] you see the costs comes through for the chemicals – it helps you understand what that physically means.

When you’re talking to the winemakers … you can … discuss things with them … you
can explain it in a better way, I guess, rather than just from [your own] point of view. It allows you to ... interact with them more because you can understand a bit more from their perspective.

Here, Mitch is still performing his own job, not Jeff the winemaker’s job, yet he is ‘learning across’ to understand the connections of his job to Jeff’s. Through an iterative process of observations, actions and talk, he learns the necessary instrumental knowledge needed to design his product costing methodology. Importantly, Mitch gains an understanding of the association between the material (yeast) and activity (fermenting process), which are Jeff’s responsibilities, and its costs (e.g. chemical costs on purchase orders), which are his own responsibility. In later interactions with Jeff and the winemaking staff, Mitch’s prior learning experience enhances his communicative capabilities and cross-functional relationships, or as he says: ‘you can explain it in a better way [because] you can understand a bit more from their perspective’.

Objects such as physical materials (e.g. yeast) or abstracts (e.g. product costs) are important indicators in organisations but can often direct the focus of learning attention only on their attainment (e.g. having an accurate process to show that different wines incur higher or lower costs to make), masking other forms of relationally-constructed learning (e.g. appreciation of the standards of excellence in related professions). This could have been a similar situation with safety, a critical organisational practice at Utility. Given the hazardous nature of Utility’s core asset of energy, developing a safety culture and institutionalising safety practices were considered to be corporate priorities when the company lagged against industry benchmarks and existing practices generated a number of serious accidents.

Over a three-year period, Utility implemented a new organisational practice called safety observations – that involved training staff, developing procedures, creating compliance forms, identifying key performance indicators (KPIs) and reporting statistics on activity performance. These safety observations could be conducted on any work activity at random times with results and recommendations recorded on safety compliance forms and shared with the workers. In addition to seeing safety observations ‘in action’, we also observed how workers institutionalised safety observations through various organisational rituals such as safety days (all-day divisional meetings that included equipment safety checks and discussion of safety performance), toolbox talks (opportunities for workers to raise safety issues and preventive procedures) and postings of safety alerts through the company bulletin board and daily emails.

The importance of safety to Utility’s business was reinforced in our site observations and always mentioned without exception in each of our thirty-six participant interviews. In observing the conduct of safety observations in the field, we saw how completion of the official paperwork became less important (often left in the observer’s work folder or in the car to be completed later) than the conversations that subsequently occurred between the observer and those workers being observed. When we probed for the benefit of safety observations during our interviews, the participants talked less about how safety observations helped to achieve target safety KPIs or safety compliance and more about their value in achieving useful cross-functional dialogue. For example, Barry and Steve as project officers are responsible for improving the ways projects are implemented by field staff in another organisational unit:
I believe if you talk about an issue … and if something else isn’t in the back of your mind, you’ll bring it forward and have a chat about it, so it’s making opportunities here … if a designer’s out there doing a safety observation and the guy doesn’t like something about the design, he’ll certainly tell him then, whereas the guy, 1) wouldn’t have been out there [if we weren’t doing safety observations, and 2) wouldn’t have the conversation if he did go out there with them. But now he’s having those conversations and he’s picking up information – Barry, Project Officer.

These days I’m supposed to do safety observations … whether I do them correctly or not for all the right reasons, it gives me an excuse to go and interact with people in the field and you need to do it because sometimes you’re going to need something off them as they do off you … if you don’t have the respect of people, then you’re not going to get as much out of them … I think it’s important … it’s something we lose focus on … that the problem with project managers often becoming process managers … they look too much at figures and reporting, rather than actual jobs and what’s happening on jobs … who’s doing jobs and how they’re doing it – Steve, Project Officer (emphasis by participant).

These comments are influenced by the particular ways regional management has chosen to organise workers and functions. Project officers ensure that project work complies with design standards and is implemented within the resources allocated. They plan the work. Operations staff located in a separate organisational unit perform the work. By specialising and separating these roles across several individuals and functions (a common form of organising), more in-depth analysis and rigour can be incorporated into work activities or workers’ jobs and roles. However, this also means that a field person is typically not involved in the design, costing and reporting and a designer is typically not involved in what is called the operational build at Utility.

Barry and Steve’s comments illustrate how they essentially ‘learn across’ organisational boundaries mediated by the opportunity, event and forum that the object of a safety observation provides. Learning for these workers is not so much about helping the company achieving its safety goals but about other relational outcomes that extend the meaningfulness of safety goal achievements. For Barry, it provides the opportunity to pick up information about what is happening in other locations; he feels more informed about the daily organisational life of the larger entity that exists beyond his job responsibilities and contributions. For both Barry and Steve, they see how their design work is accepted or not by operational field staff and where their designs could be improved (i.e. they are learning to see new possibilities for their own work). Both project officers see benefit in building relationships between their regional support unit and the field staff, partly because: ‘you do something for me, I do something for you’ is a fundamental principle in exchange theory (Blau, 1964). Steve also gains a deeper understanding about the practical impact of his work. It is no longer just a plan or design but a living operational practice performed by others and whose outcomes have consequences for company performance (e.g. ‘what’s happening on jobs [and] how they’re doing it’).

4 Discussion: Possibilities for working in learning spaces

Our illustrative examples from Utility and Winery have focused on identifying manifestations of learning that result from relations constructed between people. This orientation shifts the common focus of workplace learning research from the objects of learning – who learns, what is learned and the outcomes of learning – to the complex patterns of contextual, interactive and discursive factors that influence how
relations are constructed in workplaces to achieve both work and learning. This relational view of learning challenges the separation effect implied by the notion of rigid boundaries in three significant ways.

First, the separation implied by labels of ‘individual learning’ or ‘collective learning’ is troubled. Although our findings section highlighted the learning of various individuals (e.g. Owen, Jeff, Mitch, Barry), our lens on organisational practices (e.g. acting up, product costing, safety) suggests that practice is inherently socially produced and has multiple and sometimes unanticipated learning effects. The learning of groups or the organisation is not a simple matter of summing up the collective efforts of individual learners (Kim, 1993). For example, how Owen learned to learn while acting up was created through his interactions with other workers in the contextual environment operationally relevant at that time. It is the interactive relationships that provide the momentum and conditions for change. Owen and his colleagues were not only influenced by prevailing social cultural parameters at Utility but changed their work environment and their interpersonal relationships as a result of these interactions. As Shotter (1993, p.8) observes: ‘It is the joint activity between [people] and their socially (and linguistically) constituted situation that ‘structures’ what they do or say, not wholly they themselves’. In particular, the role of talk in negotiating organisational change is often under-theorised and undervalued in practice. Tsoukas (2005, pp.102–103) suggests that ‘change is produced through the ways people talk, communicate and converse in the context of practical activities’. In our research at Utility, we believe that as workers ‘talk’ safety observations together, they are enacting change in productive and practical ways that go beyond adhering to safety process boundaries.

Second, the notion of context as statically defining the spatial boundary of an organisation, as if it is uniform or unvarying in characteristics, is challenged. Van Oers (1998, p.475, original italics) identifies context as providing two essential processes: ‘it supports the particularization of meanings by constraining the cognitive process of meaning construction … and it prevents this particularized meaning from being isolated as it brings about coherence with the larger whole’. Situated theories of learning have tended to discuss particularisation and coherence with reference to an organisation’s overall strategy, performance outcomes and cultural norms as if a roadmap for best practice is possible (Moingeon and Edmondson, 1996; Schwandt and Marquardt, 1999). Our examples of Mitch ‘learning across’ with Jeff to understand how to allocate wine product costs or Steve and Barry using safety observations to learn other information from field workers are more aligned with Van Oers’ (1998, p.482) notion of (re)contextualising at the activity level. Meanings are dynamically constructed and mediated through the performance of activities that are relationally constructed. Further, multiple meanings can be interpreted from the same activity, that is, they are able to achieve the original purpose (e.g. safety observation compliance) and can be simultaneously or later recontextualised to influence other learning or actions (e.g. knowledge about other organisational happenings or how the project design is being implemented).

Third, the separation of work from learning, and indeed, learning from work, is challenged. Work that is integrated with learning helps workers to understand the consequences of actions in ways that a dedicated focus on learning separated from work, such as training, cannot. Work is constructively productive due to the complex and dynamic nature of what can be considered relevant at any one point in organisational life. It requires human judgement that is socially produced to determine how to take the next collective step from a myriad of potential options. Attempts to
isolate learning may serve to mask or misrepresent the interdependent effects and drivers that structure their contributions to work and the workplace. Work as learning (Felstead et al., 2009) is created through the productive use of work environments and learning environments as co-dependent spaces. These spaces enable work outcomes and development processes to co-occur and mutually influence each other, allowing the crafting of new organisational possibilities (e.g. Mitch and Carol co-create the productive possibility of changing Winery’s budgeting process while also enhancing Mitch and Carol’s individual development capabilities).

Positioned from an integrated work and learning perspective, our research engages with the complexities and changing character of organisational life. In doing so, it draws attention to the developmental modes of workplace learning and supports other researchers (e.g. Lee, 2007; Schatzki, 2006; Tsoukas and Chia, 2002) who resist simplified and objectified representations of learning. Our paper focuses on the significance of the ‘in-between’ spaces as sites for learning interactional competence that grounds learning within work practices and within relationships among interacting individuals. These relational forms of learning are, by their very nature, less visible. This raises an existing limitation to our approach that others (e.g. Bradbury and Lichtenstein, 2000) have flagged in conducting similar relational research: how to adequately represent the complex character of relations while still drawing from commonly-used research methods. We believe a practice orientation goes some way in decentring the attention on components such as individuals and objects, but argue we still need better holistic ways to represent the dynamics of practice change and practice-based learning.

A practice orientation also raises the opportunity to look at manifestations of collective learning in new ways. Although we observed groups in action, we did not particularly focus our analysis on the complex relations that shape collective learning, a focus that would represent an extension to our existing research and therefore remains outside the scope for this paper. Recent research in this area suggests the need for new typologies of collective learning (Garavan and McCarthy, 2008) with approaches such as team metacognition (McCarthy and Garavan, 2008), productive group reflection (Boud, Cressey and Docherty, 2006) and organisational sensemaking (Maitlis, 2005; Weick, Sutcliffe and Obstfeld, 2005).

5 Implications for HRD practice

In identifying these benefits and challenges for workplace learning research, what do they imply for future HRD practice? HRD has its own difficulties in defining its boundaries as a discipline and claiming usable HRD research impact for practice (Keefer and Yap, 2007; Ruona, Lynham and Chermack, 2003; Short, Keefer and Stone, 2009; Streumer and Kommers, 2002). In two surveys completed in 2001 by a cross-section of HRD professionals and HRD practitioners, ‘learning was held up as the most powerful differentiator and competitive advantage that HRD has … [yet] training issues dominate[, suggesting the needed] obsolescence of the traditional HRD tripartite (training, organization development and career development)’ (Ruona, Lyman and Chermack, 2003, p.279).

Rather than continuing to frame HRD practice as learning to improve performance outcomes, we see many opportunities to unpack the intimate relationship between individual development and organisational development in dynamic ways. One way to engage in this ‘unpacking’ is to ask different kinds of questions and to redesign the objects of learning based on the implications raised by their answers. One
example is to ask to what extent are jobs already being re-made in organisations and why? (Price, Scheeres and Boud, 2009) or ‘how can HR negotiate different forms of job description that allow flexibility in the timing, location and nature of the work being undertaken?’ (Lee, 2007, p.106). At Utility and Winery, the opportunity to act up was initiated by an existing organisational practice with a work continuity purpose that generated learning as an unintended benefit. The opportunity to act up in other organisations may be conditioned by various risk factors such as any consequences of making decisions differently from the original manager, or the availability of support or scaffolding that the worker could receive from mentors during the period of acting up. Further, the experience of acting up can provide a productive source of reflection and feedback between the worker and manager as specific examples of developing interactional competence. More broadly, there may be other opportunities to re-view organisational practices as potential development opportunities that have implications, for example, for more open-ended job/role practices rather than rigid job specifications.

Another different question might be to what extent are identities being transformed (Chappell et al., 2003) in ways that also contribute to organisational development? Can we re-view ‘development’ through experiential opportunities rather than calibrating development to linear stages of career planning or job progression? What does it mean to ‘become’ a worker in a particular organisation? How can the organisation make use of workers’ interpretations of their prior work experience? This last question connects with the notion of the lifelong learner at work and the practical implications of social capital (Field, 2005). This notion allows us to generate possible consequences for a different kind of networked facilitator role for the HRD practitioner that is not limited to remaining within organisational boundaries.

These provocative questions ‘complicate’ learning in a productive sense. They locate learning not only as conventional objects and entities that are already in clear organisational view. Rather, they make more visible the learning that emerges from the in-between spaces where relations are constructed, negotiated and understood – where development can work with blurriness rather than against it.

Acknowledgements

The Australian Research Council provided funding support for our empirical work. The authors acknowledge helpful comments from the special issue editors on an earlier draft of this paper.

References


