



Complexities of learning organizations – addressing key methodological and content issues

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Abstract

Purpose: The purpose of this paper is to highlight challenges regarding methodological approach in studying learning organizations as well as the following content related issues: knowledge harvesting in project work, role of middle managers in creating energized learning environment, structuring individual activities to promote learning, impact of context-related factors (spaces of performance) and content-related factors (storytelling) on learning in higher education, and diverging assessments of learning organizations with regard to hierarchy and organizational size.

Design/methodology/approach: Conclusions and models presented in the paper have been designed based on the systems perspective, critical thinking and critical review of previous contributions.

Findings: Findings refer to suggestions regarding further empirical work based on solid normative contributions in the field of learning organizations in general and its specific topics such as learning in project work, organizational design, role of middle managers, learning organization perceptions and learning challenges in higher education.

Research limitations/implications Conclusions and models provided in the paper need further empirical testing and validation.

Practical implications Implications for practitioners have been identified in terms of recommendations regarding possible methodological approaches in further studies of learning organizations, as well as regarding the following areas: knowledge creation cycle, structuring of individual activities to promote learning, role of middle managers in creating energized learning environment, learning challenges in higher education, and divergent assessments of learning organizations regarding organizational hierarchy and size.

Originality/value: Contributions from previous authors have been systemically and critically reviewed, adapted models have been provided and suggestions for practitioners in this regard have been offered.

Keywords: methodology, organization structure, knowledge harvesting, project work, middle managers, team energy, higher education, storytelling

Introduction – addressing methodological approaches to researching learning organizations

Research of learning organizations and organizational learning has somewhat lost its momentum. The reasons seem to be manifold. Some researchers even question if the learning organization idea is still alive (Pedler and Burgoyne, 2017). Others consider the learning organization idea idealistic, utopian, mystic, and even romantic. Such a conclusion could imply that the research in this field is equally elusive and incoherent, even impossible. This concern is related to the fact that some authors express their doubts regarding the content of

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3 the learning organization concept. There seems to be a vague consensus regarding definition
4 of concepts surrounding the learning organization paradigm, which prompts some authors to
5 question the validity of research findings.
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7 The problem regarding the validity of research conclusions can be related to the specifics of
8 the two major research approaches in social sciences: positive or empirical and normative
9 approach. Positive or empirical approach is concerned with determining what *is* based on
10 certain assumptions chosen by the researcher, which do not have to be inclusive or not even
11 entirely true or true in all circumstances. The idea is to construct a model and test it regarding
12 present conditions and under certain conditions. The model establishes relations between
13 certain variables expressed as hypotheses. However, this approach is not always suitable in
14 management, despite its wide implementation. It is especially not appropriate when
15 investigating novel management concepts which have recently emerged. Management
16 concepts are designed with the purpose to improve certain aspects of organizational
17 performance and are based on strong theoretical background. Their relevance and validity can
18 be tested only if they have been implemented by an expert in the field and with a time lag to
19 have their effects fully manifested.
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22 Grounded theory (Glaser, 1994) is especially used to conduct empirical analyses. It is used to
23 examine a plethora of empirical data and identify underlying concepts among data noise. It is
24 usually implemented in terms of single or multiple case studies. If multiple case studies are
25 considered, researchers look for conceptually similar events and actions that could explain
26 certain happenings. In case grounded theory is applied to study a certain organization or
27 organizations which have not been developed in a certain desired fashion, conclusions would
28 pertain to organizational development of a random nature dependent on certain contingencies,
29 which have been mastered in the way best suited to the parties involved. In addition, if a
30 certain concept has not been implemented in many organizations, a generalized conclusion
31 cannot be reached regarding its benefits and superiority compared to other approaches and
32 concepts. That is why normative approach is more appropriate and necessary when dealing
33 with complex new concepts and perspectives. Normative approach is concerned with
34 designing concepts and providing suggestions on how to implement them. Normative
35 approach is therefore essentially prescriptive. After substantial normative research regarding a
36 concept has been conducted, consensus has been reached and it has been systematically
37 implemented by experts can it be empirically examined, which could lead to valid
38 conclusions regarding its legitimacy.
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43 The concepts of learning organization and organizational learning seem to be especially
44 vulnerable to criticism regarding empirical results due to lack of normative research and
45 consensus regarding the definition of certain concepts and guidelines on how to implement
46 them. To make matters worse, the concept of learning organization is somewhat subtle and
47 defies rigid mechanistic descriptions. Implementation of a learning organization philosophy
48 requires a significant level of flexibility of its members, especially regarding their self-
49 development and willingness to question their own mental models and mental models
50 embedded in organizational routines. In essence, learning organization is aimed at raising the
51 level of individual and collective consciousness, which can result in their transformation
52 toward the states of being that their members truly desire. This description indicates that the
53 creation of a learning organization requires a high level of individual responsibility and
54 commitment for personal growth and development of the organization reflected in the
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3 achievement of goals that resonate with the common vision. It may well be the case that the
4 only subjects who could accurately estimate if and to what extent an organization is being
5 developed as a learning organization are organizational members. However, even the
6 perception of organizational members could significantly differ if unfounded on a good
7 understanding of the concept's ideas.
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9 The way forward with regard to the learning organization studies seems to be in further
10 normative research followed by empirical testing based on carefully designed models and
11 carefully selected respondents. The major assumption of both research perspectives is the fact
12 that the researcher has significant level of understanding of the learning organization concept
13 and its constituents. Following the normative perspective, research should be aimed at
14 scrutinizing previous ideas and providing a more nuanced descriptions, especially regarding
15 their possible implementation. If a certain concept has been thoroughly theoretically
16 elaborated and made clear to practitioners, further empirical research could prove beneficial in
17 terms of determining the validity of the designed models, their practical implications and
18 perspectives for further theoretical and empirical development. Grounded theory approach
19 designed as longitudinal studies with the purpose to detect practical implications of certain
20 models and implementation challenges could serve as especially beneficial for both academics
21 and practitioners. It is especially suggested that researchers focus on outliers or divergent
22 practices besides key research points to elucidate the implementation process more thoroughly
23 and address different contingencies and possible challenges. Iterative approach is especially
24 beneficial. In light of these arguments, practitioners are suggested to use critical thinking
25 when reading research papers and to implement only those models which seem
26 comprehensive and elaborate with solid argumentation regarding their justification. This, as
27 well as previous papers in this series, serve as a contribution in this regard. Only the proposed
28 approach could result not only in research synergies but also in greater level of work
29 satisfaction for both academics and practitioners.
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34 Following previously discussed concerns pertaining to the learning organization concept, in
35 this paper the following issues have been discussed more thoroughly: knowledge harvesting
36 in project work, the role of middle managers in creating energized learning environment,
37 structuring of individual activities to promote learning, the impact of context-related factors
38 (spaces of performance) and content-related factors (storytelling) on learning in higher
39 education and diverging assessments of learning organizations with regard to hierarchy and
40 organizational size that the respondents belong to.
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43 **Project work – source of new knowledge**

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45 Organizational learning can be defined as changes in organizational behavior visible in
46 organizational routines based on the new knowledge that has been acquired individually and
47 used collectively based on the jointly agreed vision. Organizations and their members acquire
48 knowledge from various sources. However, one of the best ways to gain knowledge is to
49 engage in certain activities so that knowledge is gained by experience and harvested for future
50 use. Such knowledge when applied in other circumstances and other organizations and
51 leading to certain expected outcomes is validated and recognized as best practice. Such
52 findings also serve as building blocks for developing a theory from the empirical perspective,
53 usually based on case studies.
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3 Tolsby (2018) has especially focused on knowledge harvesting in terms of describing and
4 interpreting how employees create and use project knowledge. The core of knowledge
5 harvesting is knowledge acquisition or collection. There is a slight distinction between
6 knowledge collection and knowledge acquisition. Knowledge collection refers to lifelong
7 knowledge gaining from various sources, which has a different level of implementation
8 potential in future projects that could not be precisely anticipated in advance. Possible sources
9 of knowledge collection could be:

- 11 • participation in different projects within the organization or in other organizations,
- 12 • participation in “experience groups” (Tolsby, 2018) with peers or with experts,
- 13 • collaboration with stakeholders (suppliers, customers, activists or other social groups).

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16 By engaging in these activities, organizational members gain insight regarding development
17 prospects in their occupational fields as well as in the field of organizational development
18 such as possible technological breakthroughs and developments as well as developments and
19 future prospects on the part of supply and demand. By engaging in knowledge collection,
20 organizational members gain valuable strategic knowledge that could significantly improve
21 organizational viability. It is worth noting that learning should be considered a comprehensive
22 activity that changes individuals in terms of affecting not only their body of knowledge but
23 also their value systems. In this regard, Garratt (2005) understands learning as “the personal
24 acquisition of attitudes, knowledge and skills which changes people’s competences,
25 understanding and ultimately their beliefs”¹. In order for it to be purposeful, learning should
26 be followed by critical reflection, which means the individual should first nourish self-
27 awareness regarding his/her strengths, weaknesses, mental models or filters of perception,
28 personal vision, mission and goals.

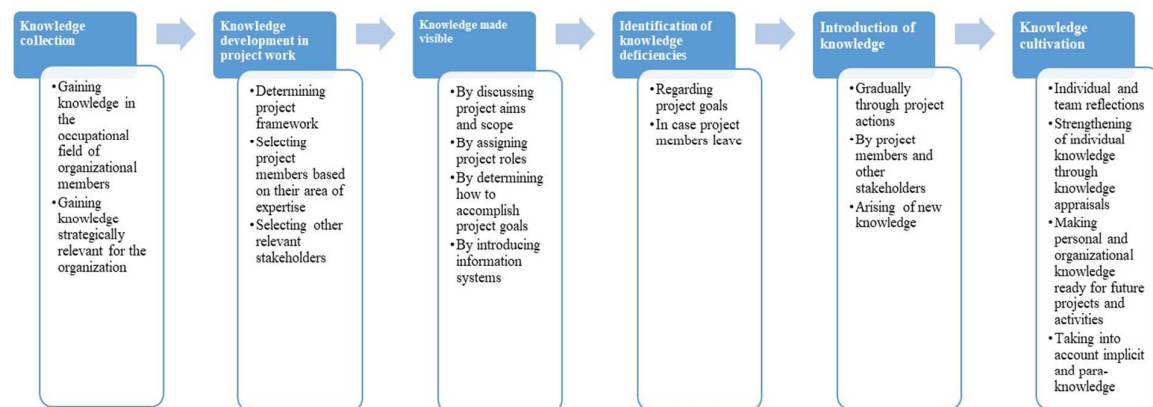
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31 Modern organizational life is predominantly led in projects (activities of known purpose and
32 duration) compared to processes (activities with known purpose and unknown duration).
33 Organizational members with certain expertise are assigned to specific projects and project
34 roles. In the beginning of the project work, existing knowledge of project members becomes
35 visible. In addition, project members become well acquainted with the project’s aims and
36 scope, which enables them to compare existing individual and collective knowledge with
37 project knowledge-related requirements. In this phase, based on accepted project goals,
38 knowledge deficiencies are identified and knowledge is acquired individually. Knowledge
39 acquisition refers to training and gaining specialized knowledge with immediate relation to
40 work operations. Existing project knowledge could be further supported by introducing
41 information systems as needed.

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45 After necessary knowledge is acquired, it is put to use. New knowledge can be introduced and
46 implemented gradually, in collaboration with project members and other stakeholders. After
47 knowledge has been acquired and implemented, new insights arise. This process occurs
48 individually and collectively when individuals alone or in teams reflect on gained
49 experiences. The process resembles action learning or After Action Reviews (AAR)
50 implemented in military operations. New insights are then merged with previous knowledge,
51 resulting not only in new or modified knowledge but also in individual and collective wisdom.
52 Other stakeholders’ input in this process is often beneficial as it could offer a new perspective
53 on the nature of occurred events. As suggested by Garratt (2000), learning requires “joint
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57 ¹ More on Bob Garratt’s ideas in: Sidani, Y., Reese, S.: Bob Garrett, *The Learning Organization*, Vol. 25 No 6, pp.
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ownership and joint responsibility”. Besides following these project work steps, practitioners are suggested to appraise the knowledge that they personally have gained during project work. The process of determining own knowledge inventory can help further strengthen individual insights and serve as a reference for future working assignments. It is especially suggested that practitioners pay attention to the implicit knowledge created in the project work, as well as to the so-called “para-knowledge” (Tolsby, 2018). This knowledge represents a synergy of the individual’s previous knowledge, his/her personality and opinion of a certain task. This kind of knowledge refers to individual and collective feelings and attitude toward certain project activities. It is therefore often difficult to transfer or express to others.

Figure 1. Knowledge creation cycle



Source: adapted from Tolsby (2018)

Structuring individual activities to promote learning

Individual learning is dependent on individual characteristics and contextual factors. Sitar *et al.* (2018) analyzed contextual structural determinants of individual learning in organizations. They tested a model which addressed the influence of structuring of individual activities on learning at work. More precisely, they investigated how components of the organizational structure (formalization, specialization and standardization of work) impact individual knowledge acquisition or sourcing (internal knowledge sourcing or learning vs. external knowledge sourcing or learning), learning style (independent vs. collaborative learning) and organizational learning according to Argyris and Schön (1996) (single- and double-loop organizational learning). This stream of research is especially important for practitioners aiming to stimulate employee learning in their organizational setting. In many organizations organizational design is not favorable for individual learning, which makes efforts in that direction fruitless.

Formalization and standardization of organizational structure strongly determines individuals’ approach to work and learning. When work is significantly formalized and standardized, individuals must follow rules, standard operating procedures (SOPs) and policies, rendering them little or no freedom to be creative. Such organizational design grants stability and predictability but is very dangerous in times of crisis or when any kind of change should be implemented. It is referred to as mechanistic organizational design. In organic organizational settings, work is less structured and formalized and work operations are more broadly defined.

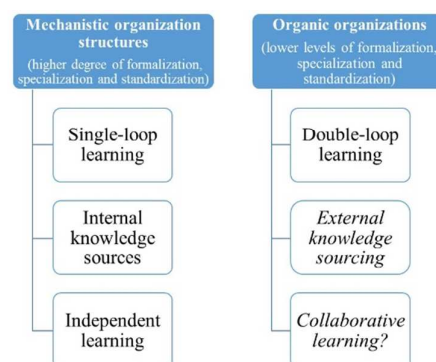
Organizational progress depends on proactiveness and creativity of its members, which should be based on continuous learning and knowledge exchange.

The general assumption regarding knowledge sourcing and organizational structure in terms of mechanistic vs. organic organization is that in an environment characterized by high level of structure (formalization and standardization), employees refer to internal knowledge embedded in policies, SOPs and rules. Learning from internal sources is therefore more pronounced. On the contrary, when the level of structure is low and rules and SOPs are less pronounced, employees tend to look elsewhere for knowledge sources, namely externally, in professional circles and with other stakeholders. On the sample of employees across a large company in Slovenia, Sitar *et al.* (2018) proved that in the organizational context that was more formal employees resorted to individual sources of knowledge more intensely compared to their counterparts in less structured organizations. However, inclination towards external knowledge sources of those employed in less structured organizations was not confirmed.

Regarding preferences toward specific learning styles, it is assumed that in more structured organizational settings individuals are less engaged in social interactions and therefore in knowledge sharing, which means that they are more inclined to employ independent learning. On the other hand, in less structured organizations, both formal and informal interactions are more intense, which could lead to a greater level of collaborative learning. Sitar *et al.* (2018) did, indeed, prove that in more structured organizations independent learning prevails. However, the hypothesis that less structured organizations serve as predictors of collaborative learning was not confirmed. However, it was found that less-structured work design did not support independent learning.

Since double-loop learning refers to the fact that underlying assumptions and established principles are examined and replaced when needed, it could be assumed that less structured or organic organizations would be places in which such learning occurs more frequently and intensely. On the other hand, more structured or mechanistic organizations rely heavily on established principles and practices, which does not render possibilities for their questioning. Employees are therefore expected to rely on the existing knowledge about working practices to solve problems within existing organizational assumptions, which is the content of single-loop learning. It is assumed that the quest for solutions beyond established principles is not allowed. Sitari *et al.* (2018) did, indeed, find that organic organizations are venues in which double loop learning occurs more frequently. Mechanistic organizational structures were found to be more supportive of single-loop learning. The results are summarized in Figure 2.

Figure 2. Contrasting learning in mechanistic and organic organizations



Source: based on results by Sitari *et al.* (2018)

Even though the relation between internal knowledge sourcing and mechanistic organization structures as well as the relation between organic organizations and collaborative learning is theoretically well-founded, practitioners should adopt these assumptions with caution due to the fact that they have not been empirically verified by Sitari *et al.* (2018). However, practitioners should be well aware of the fact that organizational design has a huge impact on employee behavior in general and especially regarding their learning and knowledge exchange habits and routines. In case a higher degree of learning leading to double-loop learning is expected, organizational design should in general be more flexible. In addition, practitioners should keep in mind another finding: higher level of education was found to support employees' greater level of confidence for independent work as well as inclination towards external sources of knowledge. However, in order for double-loop learning to occur on the organizational level, underlying assumptions should be questioned collectively and new ways of working should be designed and implemented organization-wide. That is why practitioners should consider implications of the organizational design and the degree of education of employees jointly in order to reap the highest benefits of individual and organizational learning.

Role of middle managers in creating energized learning environment

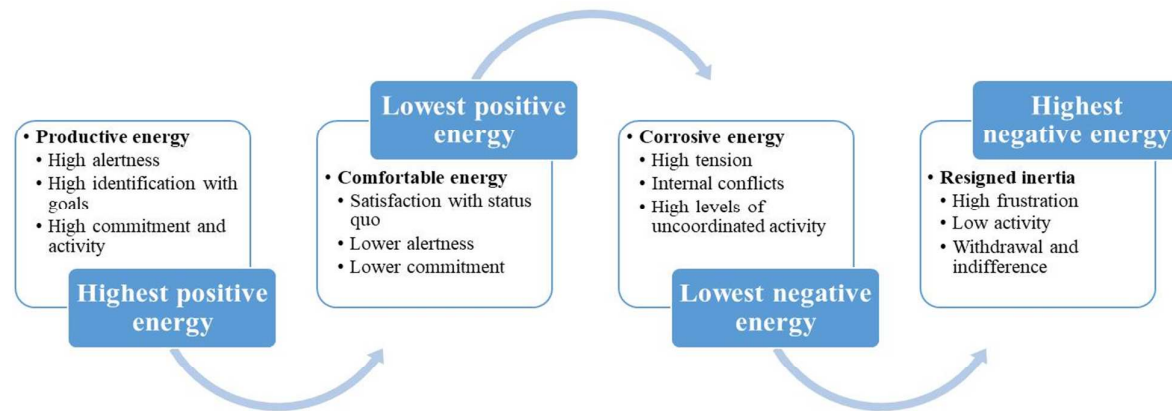
To address challenges in terms of increased competition, demand for diversification and innovation and other challenges from external environment, many organizations adjust their organizational structures, which become more organic, flattened and flexible. One of the main organizational features has become cross-functional collaboration and project work. In this way, organizations try to maintain equilibrium between the quest for increased stability and predictability of operations, which improves productivity and efficiency, and the quest for change and innovation, or increased effectiveness or marketability of the value added. Learning seems to be the only routine that serves as a link between these two seemingly opposing forces and which improves both. In other words, by increasing purposeful learning, organizations can establish efficient routines and change them when needed, which is the result of new learning.

Middle managers seem to bear the greatest pressure in modern organizations. They serve as the key link between top management and employees, as well as between efficiency and effectiveness. In order to do that, they have to assume the entrepreneurial role. Entrepreneurship is their key responsibility and behavioral trait. Entrepreneurship is created in many ways: in cross-functional collaboration and project teamwork that can comprise internal and external stakeholders. By creating momentum for change, which could result in entrepreneurial activities, middle managers in their autonomous or semi-autonomous organizational units have the responsibility to create favorable working conditions for creativity, innovation and synergy of collective action. Their sense-making and sense-giving of current conditions provide key incentives for further work, learning and change. In that way, the degree of their personal commitment strongly determines the employees' involvement and dedication to learning and change.

Tasks of middle managers refer to many challenges: resource allocation, task creation, determination of priorities and responsibilities, balancing of team roles, managing conflicts, creating learning and knowledge harvesting opportunities, managing existing knowledge,

strengthening knowledge implementation enablers etc. However, these activities are impossible without a substantial level of emotional commitment on the part of middle managers and employees, which has been addressed by Varney and McKenzie (2018). They have built their research on team energy categorization provided by Cole *et al.* (2005, 2012), who stated that energy could have two basic states: positive and negative. The continuum between positive and negative energy is shown in Figure 2.

Figure 2. Positive-negative energy continuum



Source: Adapted from Cole *et al.* (2005, 2012)

On the sample of three large organizations, Varney and McKenzie (2018) surveyed 43 middle managers, which resulted in six distinctive energy personas or profile groups relative to specific team energies presented in Table 1. Based on the research by Varney and McKenzie (2018), each type of middle manager was assigned a type name, followed by identified characteristics and concerns. Practitioners could use the information presented in Figure 2 and Table 1 to check the level of energy of their teams and identify which personal changes should be made to reach the stage in which both managers and team members could thrive and achieve best results.

Practitioners should note that groups regarding types 3, 5 and 6 were too small so conclusions could be partially valid. However, based on the findings, it could be concluded that type 3 middle managers serve as team leaders in circumstances not characterized with a high degree of change, who are very familiar with their role, do not find or face many reasons to instigate major changes and who have therefore built strong personal bonds with team members.

It could also be concluded that type 5 middle managers are unsuited for the role of team leader generally or in particular circumstances. Even though issues of concern were not identified, it could be speculated that these managers lack clear guidance from their superiors, which makes them uncertain about the results they are supposed to deliver and leads to them questioning their adequacy for the role. The combination of these problems raises doubts of self-worth and self-confidence. Feelings of self-inadequacy could also result from the fact that they were appointed for the job without their full consent or that they were not well informed about the task before they accepted it.

Type 6 managers could be viewed through the prism of the team as a whole in which they do not feel accepted as leaders. This situation could be caused by numerous factors. For example,

team members could reject the approach, principles and methods suggested by the manager, they could doubt the manager's skills and expertise or they could dislike the manager's personality. All this could contribute to the managers' feeling of detachment from their role.

Concerns described above should be further tested empirically. However, practitioners should carefully examine the identified problem areas if found in the described situations.

Table 1. Distinctive energy personas of middle managers

	Name	Team energy	Characteristics	Concerns
Type 1	Owner of team results	Productive	Positive attitude toward change High level of identification with team goals High level of commitment Positive self-image Keen on learning Possible influence upwards	Resource adequacy Adjustments of details to the "big picture" for better performance
Type 2	Role player	Combination of productive and comfortable energy	Direction towards performance and efficiency Identification with role and assignment Detached motivation Less reflection of self Less motivation for learning	Influence upwards Completion of tasks by others Motivation of employees
Type 3	Comfortable team leader	Comfortable energy	Identified with role Highly affiliated with their team Least reflective	?
Type 4	Self-compelled role player	All four energy types	Direction towards performance Teetering between goal identification and mere responsibility for the team Strong team affiliation Very reflective	Reasons for change Resource adequacy Conflicting priorities Feelings of vulnerability Self-criticism
Type 5	Unsuited for the role	Resigned inertia	Mix of commitment to the role and detachment from it Lack of commitment to change Overwhelmed by demands Reflections regarding capacity-expectations gap	?
Type 6	Detached	Corrosive energy	Detached from the role Positive self-reflection	Approach not accepted by members

Lack of influence
Lack of support

Source: based on the results by Varney and McKenzie (2018)

Learning challenges in higher education

Higher education institutions are perceived by many as places of learning excellence. However, that is not always the case. In recent decades, more emphasis was given to control of the learning process followed by attempts to commercialize or “corporatize” higher education instead of looking for opportunities on how learning could be enabled, stimulated and set free. Challenges of learning in higher education in terms of context-related factors (spaces of performance) and content-related factors (storytelling) have been addressed by Jørgensen (2018). Jørgensen (2018) defines a space of performance as “a collective, discursive, material, and relational space, which frames the conditions of possibility for learning in organizations”. Space of performance is often disregarded as important for learning and greater emphasis is given to content-related factors, such as methods of learning. However, spaces of performance shape organizational relational capital by its material preconditions, certain space energy and other circumstances. Learning performance should be viewed as a synergy of complex “material-discursive practices” (Barad, 2007). Spaces of performance are therefore context related factors, which provide the environment for reflexive discourses. If spaces of performance are regulated and controlled, learning and knowledge creation is less than optimal. Practitioners, especially administrators in higher education are encouraged to examine their administrative practices and consider if and to what extent they hinder learning.

Storytelling as content-related factor contributing to performance in higher education should also be considered by practitioners and administrators. For it to be effective, learning should be accompanied by high motivation, positive energy, playfulness, passion and dedication. Storytelling is one such method. It combines words with emotions and therefore enlivens certain events making them memorable. Storytelling is open to experimenting, creativity and spontaneity, which leads to plurality of expressions. It could therefore be a method that brings participants closer to integrative solutions. It should be supported by free movement of people, which could stimulate curiosity to learn something new from someone new. Practitioners in higher education are encouraged to promote freedom, movement and expression of their members, especially educators, which could stimulate curiosity and learning of their students as new members of the society, which bear the burden of creating new forms of welfare.

Divergent assessments of learning organizations

Organizations’ characteristics are often examined at the executive level because it is assumed that upper echelons have the greatest insight and overview of the organizational behavior. However, that might not always be the case. Filstad *et al.* (2018) examined if assessment of learning organization characteristics differed relative to hierarchical position and organization size by submitting a survey to top managers, middle managers and employees in four local police districts in Norway. They used the questionnaire by Garvin *et al.* (2008, pp. 112-113) and probed into “supportive learning environment”, “concrete learning processes and practices”, and “leadership that reinforces learning”. The respondents have generally rated the surveyed dimensions of the learning organization low. Filstad *et al.* (2018) found differences

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3 in rating learning organizations relative to the hierarchical position of their respondents.
4 Middle managers rated “learning environment” and “learning processes and practices” better
5 than employees, while employees rated “leadership that promotes learning” better than middle
6 managers. However, only one difference among groups (“learning environment”) was found
7 to be statistically significant. It is interesting to note that items such as “time for reflection”,
8 “experimentation” and “information” were rated similarly by both groups. Consistent with
9 previous results, top managers were also found to rate their districts as learning organizations
10 significantly better than middle managers. Regarding organizational size, it was found that
11 respondents in larger police districts rated their organizations as learning organizations better
12 than their colleagues in smaller districts.
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15 It should be concluded that the presented results raise concerns regarding developing and
16 maintaining learning organizations. In general, organizations are transformed into learning
17 organizations by incentives and guidelines from top management followed by efforts of
18 organizational members to change organizational routines. However, the process is rarely
19 based on consensus regarding these efforts. In that sense, certain organizational members
20 could perceive things differently and could draw their own conclusions regarding introduced
21 practices and their implications. It is therefore highly suggested that practitioners, especially
22 top managers regularly conduct surveys and examine perceptions of organizational behavior
23 by organizational members followed by intensive dialogue on introduced initiatives and
24 changes. Such practice could bring organizational members closer together, contribute to
25 organizational cohesion, higher commitment to goals and earlier detection of flaws and
26 erroneous mental models. Ironically, that is exactly the essence of a true learning
27 organization.
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