Complexities of learning organizations – addressing key methodological and content issues

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<td>Manuscript ID</td>
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<td>Implications for Practitioners</td>
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Complexities of learning organizations – addressing key methodological and content issues

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
the learning organization concept. There seems to be a vague consensus regarding definition of concepts surrounding the learning organization paradigm, which prompts some authors to question the validity of research findings.

The problem regarding the validity of research conclusions can be related to the specifics of the two major research approaches in social sciences: positive or empirical and normative approach. Positive or empirical approach is concerned with determining what is based on certain assumptions chosen by the researcher, which do not have to be inclusive or not even entirely true or true in all circumstances. The idea is to construct a model and test it regarding present conditions and under certain conditions. The model establishes relations between certain variables expressed as hypotheses. However, this approach is not always suitable in management, despite its wide implementation. It is especially not appropriate when investigating novel management concepts which have recently emerged. Management concepts are designed with the purpose to improve certain aspects of organizational performance and are based on strong theoretical background. Their relevance and validity can be tested only if they have been implemented by an expert in the field and with a time lag to have their effects fully manifested.

Grounded theory (Glaser, 1994) is especially used to conduct empirical analyses. It is used to examine a plethora of empirical data and identify underlying concepts among data noise. It is usually implemented in terms of single or multiple case studies. If multiple case studies are considered, researchers look for conceptually similar events and actions that could explain certain happenings. In case grounded theory is applied to study a certain organization or organizations which have not been developed in a certain desired fashion, conclusions would pertain to organizational development of a random nature dependent on certain contingencies, which have been mastered in the way best suited to the parties involved. In addition, if a certain concept has not been implemented in many organizations, a generalized conclusion cannot be reached regarding its benefits and superiority compared to other approaches and concepts. That is why normative approach is more appropriate and necessary when dealing with complex new concepts and perspectives. Normative approach is concerned with designing concepts and providing suggestions on how to implement them. Normative approach is therefore essentially prescriptive. After substantial normative research regarding a concept has been conducted, consensus has been reached and it has been systematically implemented by experts can it be empirically examined, which could lead to valid conclusions regarding its legitimacy.

The concepts of learning organization and organizational learning seem to be especially vulnerable to criticism regarding empirical results due to lack of normative research and consensus regarding the definition of certain concepts and guidelines on how to implement them. To make matters worse, the concept of learning organization is somewhat subtle and defies rigid mechanistic descriptions. Implementation of a learning organization philosophy requires a significant level of flexibility of its members, especially regarding their self-development and willingness to question their own mental models and mental models embedded in organizational routines. In essence, learning organization is aimed at raising the level of individual and collective consciousness, which can result in their transformation toward the states of being that their members truly desire. This description indicates that the creation of a learning organization requires a high level of individual responsibility and commitment for personal growth and development of the organization reflected in the
achievement of goals that resonate with the common vision. It may well be the case that the only subjects who could accurately estimate if and to what extent an organization is being developed as a learning organization are organizational members. However, even the perception of organizational members could significantly differ if unfounded on a good understanding of the concept’s ideas.

The way forward with regard to the learning organization studies seems to be in further normative research followed by empirical testing based on carefully designed models and carefully selected respondents. The major assumption of both research perspectives is the fact that the researcher has significant level of understanding of the learning organization concept and its constituents. Following the normative perspective, research should be aimed at scrutinizing previous ideas and providing a more nuanced descriptions, especially regarding their possible implementation. If a certain concept has been thoroughly theoretically elaborated and made clear to practitioners, further empirical research could prove beneficial in terms of determining the validity of the designed models, their practical implications and perspectives for further theoretical and empirical development. Grounded theory approach designed as longitudinal studies with the purpose to detect practical implications of certain models and implementation challenges could serve as especially beneficial for both academics and practitioners. It is especially suggested that researchers focus on outliers or divergent practices besides key research points to elucidate the implementation process more thoroughly and address different contingencies and possible challenges. Iterative approach is especially beneficial. In light of these arguments, practitioners are suggested to use critical thinking when reading research papers and to implement only those models which seem comprehensive and elaborate with solid argumentation regarding their justification. This, as well as previous papers in this series, serve as a contribution in this regard. Only the proposed approach could result not only in research synergies but also in greater level of work satisfaction for both academics and practitioners.

Following previously discussed concerns pertaining to the learning organization concept, in this paper the following issues have been discussed more thoroughly: knowledge harvesting in project work, the role of middle managers in creating energized learning environment, structuring of individual activities to promote learning, the 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 that the respondents belong to.

Project work – source of new knowledge

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

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

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

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

After necessary knowledge is acquired, it is put to use. New knowledge can be introduced and implemented gradually, in collaboration with project members and other stakeholders. After knowledge has been acquired and implemented, new insights arise. This process occurs individually and collectively when individuals alone or in teams reflect on gained experiences. The process resembles action learning or After Action Reviews (AAR) implemented in military operations. New insights are then merged with previous knowledge, resulting not only in new or modified knowledge but also in individual and collective wisdom. Other stakeholders’ input in this process is often beneficial as it could offer a new perspective on the nature of occurred events. As suggested by Garratt (2000), learning requires “joint

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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

![Knowledge creation cycle diagram](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**
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**

![Energy Continuum Diagram](image)

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

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<tr>
<th>Type</th>
<th>Name</th>
<th>Team energy</th>
<th>Characteristics</th>
<th>Concerns</th>
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<tr>
<td>Type 1</td>
<td>Owner of team results</td>
<td>Productive</td>
<td>Positive attitude toward change, High level of identification with team goals, High level of commitment, Positive self-image, Keen on learning</td>
<td>Resource adequacy, Adjustments of details to the “big picture” for better performance</td>
</tr>
<tr>
<td>Type 2</td>
<td>Role player</td>
<td>Combination of productive and comfortable energy</td>
<td>Direction towards performance and efficiency, Identification with role and assignment, Detached motivation, Less reflection of self, Less motivation for learning</td>
<td>Influence upwards, Completion of tasks by others, Motivation of employees</td>
</tr>
<tr>
<td>Type 3</td>
<td>Comfortable team leader</td>
<td>Comfortable energy</td>
<td>Identified with role, Highly affiliated with their team, Least reflective</td>
<td>?</td>
</tr>
<tr>
<td>Type 4</td>
<td>Self-compelled role player</td>
<td>All four energy types</td>
<td>Direction towards performance, Teetering between goal identification and mere responsibility for the team, Strong team affiliation, Very reflective</td>
<td>Reasons for change, Resource adequacy, Conflicting priorities, Feelings of vulnerability, Self-criticism</td>
</tr>
<tr>
<td>Type 5</td>
<td>Unsuit ed for the role</td>
<td>Resigned inertia</td>
<td>Mix of commitment to the role and detachment from it, Lack of commitment to change, Overwhelmed by demands, Reflections regrading capacity-expectations gap</td>
<td>?</td>
</tr>
<tr>
<td>Type 6</td>
<td>Detached</td>
<td>Corrosive energy</td>
<td>Detached from the role, Positive self-reflection</td>
<td>Approach not accepted by members</td>
</tr>
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</table>
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 at el. (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 at el. (2018) found differences
in rating learning organizations relative to the hierarchical position of their respondents. Middle managers rated “learning environment” and “learning processes and practices” better than employees, while employees rated “leadership that promotes learning” better than middle managers. However, only one difference among groups (“learning environment”) was found to be statistically significant. It is interesting to note that items such as “time for reflection”, “experimentation” and “information” were rated similarly by both groups. Consistent with previous results, top managers were also found to rate their districts as learning organizations significantly better than middle managers. Regarding organizational size, it was found that respondents in larger police districts rated their organizations as learning organizations better than their colleagues in smaller districts.

It should be concluded that the presented results raise concerns regarding developing and maintaining learning organizations. In general, organizations are transformed into learning organizations by incentives and guidelines from top management followed by efforts of organizational members to change organizational routines. However, the process is rarely based on consensus regarding these efforts. In that sense, certain organizational members could perceive things differently and could draw their own conclusions regarding introduced practices and their implications. It is therefore highly suggested that practitioners, especially top managers, regularly conduct surveys and examine perceptions of organizational behavior by organizational members followed by intensive dialogue on introduced initiatives and changes. Such practice could bring organizational members closer together, contribute to organizational cohesion, higher commitment to goals and earlier detection of flaws and erroneous mental models. Ironically, that is exactly the essence of a true learning organization.

**Further readings**


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