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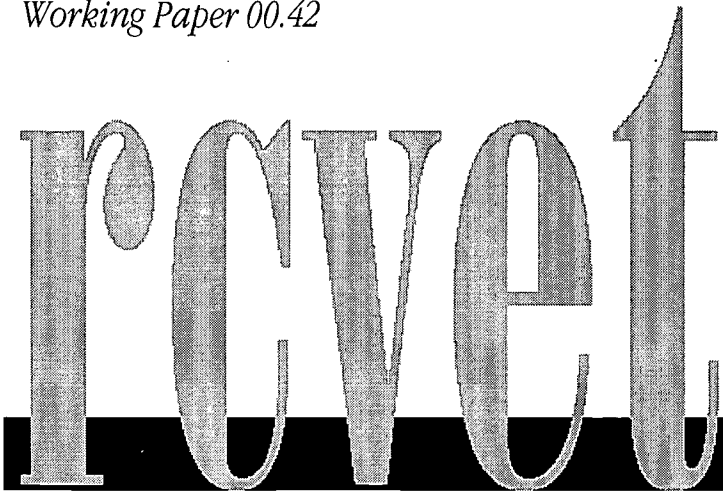
ABSTRACT

A study examined challenges associated with investigating the role and occupational identity of learning practitioners who operate within the organizational as opposed to the educational institution context. These challenges include the following: (1) naming this group of organizational practitioners; (2) distribution of learning responsibilities; (3) diversity of theoretical bases for practice; (4) diverse models of organizational practice; (5) reported shifts in prerequisite competences of practice; and (6) new understanding of learning. The study shows that a new type of learning practitioner is emerging in organizational context. Research challenges arising at least in part from the shifting nature of this comparatively unregulated field of practice exist and need to be addressed. Such research could be seen as contributing a better understanding of the learning that is occurring in organizations and in institutions contributing to work force capability building as a basis for the ongoing development of professionals who work in this area. (Contains 33 references.) (KC)

The Learning practitioner in organisations: Challenges in researching a changing role

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The Learning practitioner in organisations: Challenges in researching a changing role

Robyn Johnston

This paper examines some of the challenges associated with investigating the role and occupational identity of learning practitioner who operates within the organisational as opposed to educational institution context. This avenue for research emerges from the recognition that much of the work related learning that occurs in the post compulsory education years is happening outside educational institutions and is often not related to formal education or accreditation systems. Despite ample evidence of the amount of structured training occurring in workplaces (Robinson, 1999), and indications that this data may overlook much of the non-structured training taking place in workplaces, the main focus particularly from an education and employment policy position has until recently been on rethinking educational institutions and systems. As a result, even at a time when the workplace is being re-legitimised as a site of learning (Harris, Simons and Bone, 2000), many of the initiatives and less formal activities that are taking place in organisations which are contributing to learning gains as well as improvements in organisational performance are not as well recognised or remain relatively undocumented. Additionally, perhaps because of the turbulence in organisations and the accelerating use of technology as part of the learning process in organisations, there is an unclear picture or at least multiple pictures of what is seen as constituting learning in enterprises and how such learning is achieved. There is also a lack of clarity about who is responsible for fostering such learning, the roles they play and the skills and attributes required of them for professional practice in the rapidly changing organisational environment.

The lack of clarity about the nature of the practitioners who are responsible for learning within organisations and the challenges one confronts in conducting research about such practitioners is the focus of this working paper. With this focus the paper also reflects some of the thinking of researchers in the early stages of a research project being undertaken by the RCVET which is examining the role and identity what researchers have named the 'New VET professional' and the issues they are confronting. This term 'the new VET professional' is being used in this project as a umbrella term to encompass the group of professionals who are engaged in education and training activities that focus on preparing and developing workplace capability but whose roles and work tasks extend beyond traditional teaching and training. As such the term is being used to include full time TAFE teachers who undertake a variety of activities that may extend beyond the traditional classroom, laboratory or workshop. It also includes people in organisations whose primary function is to enhance individual, group and organisational learning within enterprises. Such labelling also allows for the inclusions of those from the community education sector

who manage the vocational side of the ACE sector's business; those who manage registered training organisation activities and those who act as independent education training and development consultants. It may in fact include others. In short in the 'New Vet Professional' study researchers are using the term to encompass the diverse learning professionals found across the various sectors of contemporary vocational education. In so doing the researchers are using the term to refer collectively to a group of practitioners who in various ways are contributing to the capacity building of the workplace through learning or learning related initiatives yet may not use this term 'VET professional' to label themselves occupationally. A major question of this project is the degree to which this group of practitioners can be seen as being driven by similar value sets and require similar sets of core competences and capabilities for practice. This examination may yield insights into the extent to which practitioners from this field can be seen as having a cohesive, albeit shifting, professional identity.

In the process of finding answers to some of these questions a range of challenges immediately surface when researching the role and identity of learning practitioners who work within organisational contexts. The remainder of this paper examines some of these challenges.

NAMING

The first problem emerges with the naming of this group of organisational practitioners. The plethora of positional titles used to delineate those whose primary work involves fostering learning either in individual employees, with groups within the organisation or in the organisation as a whole has confronted researchers in this field in both Australia and overseas. (Harris, Simmons and Bone, 2000; Smith, 1996; Mulder, 1992). Common positional titles used include: training officers, training and development practitioners, learning systems consultants or managers, performance improvement consultants, learning strategists, human resource developers, education officers, enterprise trainers, HR consultants, managers, learning and development consultants. These titles form the beginning not the end of the list of labels for such positions. This multiplicity in labelling in itself creates some difficulties for research into the practitioners in this field and more significantly I suspect may be symptomatic of some of the difficulties of telling the story of learning within Australian organisational contexts and in exploring the role of these protagonists as a whole.

Firstly it presents the problem of from whom in organisations and about whom does the researcher seek information when telling the story of learning in organisations especially if multiple labels are used within one organisation. Further questions about labelling include, are the labels assigned to learning related positions within organisations the result of the languaging idiosyncrasies of the organisation, or, are they more an indication of each organisation's expectations about the role of these practitioners within each organisation. As such the labelling may be insignificant in relation to the role of such practitioners or

conversely may be a real indication of difference between members of the occupational field both within and between organisations.

These issues related to naming may also be problematic for the 'profession' as a whole in terms of its capacity to see itself as a 'occupational community' which has a distinct form of 'professional or occupational identity' that is visible and relatively coherently meaningful for those outside this profession as well as possibly those working within.

DISTRIBUTION OF LEARNING RESPONSIBILITIES

The problem for researchers resulting from multiple positional labels is further compounded by a trend that is revealing that responsibility for development of staff and on going learning within an organisation is often widely distributed across many positions within organisations. The boundaries within which learning is recognised as occurring could be argued are breaking down, or at least expanding. More positions within organisations could be seen as having or contributing to the learning efforts of an organisation.

Thus, in much contemporary organisational and management literature there is a call for those in managerial roles to adopt a responsibility for embedding learning amongst their employees and within their arena of responsibility (Stace and Dunphy, 1996; Turner and Crawford, 1996; Senge, 1990). There is also substantial practice-based evidence of line supervisors being accountable for both the learning/ training and assessment of employees. One only has to look at competency standards documents to see development of staff as a subset of competences required for those operating at an AQF level 4 in many industries and organisations.

There is also substantial evidence of the line between what were seen as generalist HR practitioners and those with specialist development skills breaking down as both fields of practice face significant change and as understandings of developing individuals and organisations extend beyond the traditional delivery of training programs (Ulrich, Losey and Lake, 1997). The debate as to whether the human resource development function within an organisation is a separate field of occupational endeavour requiring a specialist knowledge or that it can be subsumed within the field of HR is not new. It has regularly surfaced since the emergence of terms such as strategic human resource management the early 1980s (Fobrum, Tichy and Devanna, 1984). However the pressure for the integration of many organisational functions has been accelerated with the increasing popularity of the notion of the vertically integrated organisational structures, as has the call for the integration of the HR/ HRD functions within organisations as each area of professional practice has been distributed more widely in large organisations to business unit of operational level.

Similarly, as initiatives related to knowledge management and e-learning become more prominent in organisations, the position that those in the organisational learning function

have a prime responsibility for learning and development may face a further erosion. In response to this potential challenge given the attention to knowledge management practice in many organisations, there is already evidence emerging in the literature related to training and development professionals of the need for organisational learning professionals to position themselves within the knowledge management arena (Stuller, 1998). There is also some evidence of organisations positioning their learning and development programs as knowledge management initiatives (Davernport, De Long and Beers, 1998).

In a similar vein the rapid advancements in computing and telecommunication technologies are producing both new opportunities for and new forms of learning in organisational contexts. The increasing accessibility of interactive client server systems, powerful desktop computers with high resolution graphics, high speed local and wide area networks and large capacity data management and multimedia applications along with more traditional computer based training programs to employees organisation wide have allowed European researcher Tessaring to arguing that that training will increasing be something called up rather than attended (Tessaring, 1998; Curtice and Lipoff, 1995) These learning related developments immediately introduce a new range of players to this field of learning in organisations and require the traditional holders of development responsibility to acquire new skill sets. In organisations operating with advanced technologies there is a need for learning professionals to have increased technological literacy if not expertise and some evidence of the prime protagonists in E learning systems being from areas such as Management Information Systems and Information Engineering. As such there is the potential for those managing the learning in organisations to have significant understandings of the technologies used as part of the learning process as opposed to the learning potential of the medium (McIntosh, 1995; Galagan, 1994).

Additionally, there is also considerable evidence of organizations expecting individuals to take much responsibility for their ongoing learning. In some organisations this means that employees are required to locate forms of development that would be most useful for them often working with their supervisors in some form of performance management arrangement (Johnston, McAuley and Ogden, 2000). In other team based work structures the learning that is occurring as seen as coming from the very team based structure supported by feedback mechanisms or associated with providing such teams with access to quality data collections or other expert systems. In these situations the work site, work relationships and workplace technology are being recognised as the basis for skills acquisition and learning rather than the workplace trainer or learning professional.

These trends may have produced certain tensions for the specialist 'learning professional'. On the one hand such a focus on learning given the distribution of responsibility has heightened a focus on learning within organisational contexts. As a result learning and ongoing development seems to have entered the lexicon in a range of diverse fields of professional and organisational practice. It has been more closely linked to notions of performance, productivity and competitive advantage and moved closer to centre stage of the core work of organisations. As such, certainly in many high performance organisations,

training and development seems to have lost its positioning as the orphan child or the poor cousin of the core organisational activity.

On the other hand, one of the tensions such a movement has created is the possibility that in some contexts perceptions of the specialist working knowledge and skill of the learning practitioner potentially has become less valued and less essential as more employees are sharing this work role. In some cases this has led to a marginalisation of the learning professional's centrality within organisational settings and in the learning process within organisations even to the extent of the elimination of the role or contractualisation or outsourcing of the role (McIntosh, 1995, Galagan, 1994).

Given the trends, the challenge for the researcher in exploring the role of the learning professional in the organisation is one of locating those with prime responsibilities for learning and in fact ascertaining prime sources and sites of learning in workplaces. This is sometimes more difficult as the major sites of learning and core learning providers may not necessarily be recognised as sources of learning occurring in organisations by the organisation itself. Thus the task of determining who the new learning professional (VET professional) is and the capabilities and areas of expertise they require becomes more difficult.

DIVERSITY OF THEORETICAL BASES FOR PRACTICE

A further challenge in understanding the role and nature of professional identity of learning practitioners who work within the organisational context could be seen as emerging from a lack of agreement amongst both theorists and practitioners about the underpinning theories that inform the practice field. While diversity of theoretical basis underpinning practice can be found in a number of professional or practice fields, such inconsistency can lead to difficulties in delineating the field or preparing practitioners for at least a common or cohesive field of practice (Pace, 1996). This lack of consistency has been well identified in the literature related to learning within organisations. Karen Watkins (1991) for example referred to the 'cacophony of voices' that had to this time attempted to determine the underpinning theoretical foundations of the field. The number of differing voices could be seen to have swollen throughout the decade. For example over the last decade various theorists have argued the dominance of least one of the following fields as explaining the knowledge individuals practitioners need and the principles they should observe as practitioners. These include organisational theory, economics, information theory, careers development theory, developmental stage theory, adult learning theory, systems theory, human capital theory, learning theory and communication theory. Perhaps the debate could be seen as almost resolving itself in terms of a willingness for most practitioners to work from an eclectic theory base or react pragmatically.

The diversity of theoretical bases seen as underpinning this field in itself is not necessarily a problem in terms of performances being achieved in organisations, especially in the current post-industrial, post modernist era in which notions of absolutes and absolute truth

have been challenged, however it potentially contributes to the lack of unity of practice, and commonly held ideas about practice and consistently required working knowledges as held by practitioners within the field and potentially dissipates the view that there is a need for commonly held specialist knowledge within this setting. Chappell (2000, 4) has argued that the idea of the full time VET teacher or trainer being to pass on technical and vocational expertise has become highly problematic because full time teaching employment status often precluded maintenance of vocational expertise in a climate of rapid technological change. He has suggested that expertise in learning may well become the central expertise for the new VET professional. Questions could also exist about central role of and knowledge required by the learning professional operating in the organisational context. Is expertise in learning seen as central or at least sufficient for those in fostering learning in enterprises, is this expertise sufficient or the basis for practitioners in this area to see themselves as an 'occupational community' or a community of practice and will such expertise form the basis of a perception that this is a coherent professional field for those outside the field?

DIVERSE MODELS OF ORGANISATIONAL PRACTICE

A further problem which may explain some of the lack of unity in professional identity and add to the confusion about what is 'the new VET professional' or the learning professional looks like and what are the required areas of expertise are for this group of professionals also emerges from the diversity of models of practice that are apparent in organisations. One recent attempt to illustrate this diversity has been presented by the Irish scholars Garavan, Heraty and Barnicle (1999). They suggest it is possible to see the practices of learning in organisations (and more specifically their conceptualisation of Human Resource Development in organisations) as broadly fitting into one of three categories.

In the first model HRD activity is portrayed as a reactive activity, isolated from the core organisational strategies focussed on current needs and relying on a systematic model of delivery. This form of practice is usually staffed by specialists whose roles are focussed primarily on provision as requested by managers. It is operationally and subject matter driven, educational in orientation and reliant on passive transfer of knowledge which is usually delivered in a training classroom rather than the workplace. This type of approach these researchers argue is usually driven by the strong assumption that training needs can be identified in precise detail and emphasises fixed job roles and boundaries.

A second common model of practice emphasises a more competency than job or task based orientation. In so doing it tends to include a broader range of activities including employee development, self managed learning activities, career development strategies and organisational development processes and tasks. The primary focus of all development activities is their contribution to the tactical level within the organisation rather than a close linkage with corporate priorities or strategies. This type of practice may adopt a marketing type philosophy whereby it emphasises contractual type relationships with various business units, involve line managers and other stakeholders in the process of development services

and perceive the line function as customers. Some attempts may involve attempts to form closer linkages with other HR strategies as part of the process of fostering learning and improved performance. The researchers also suggest specialists working within this form of framework have a better understanding of the language of business.

The third model they present is that which is often referred to as strategic human resource development. The concern of such a model is the establishment of strong linkages with corporate goals and the achievement of vertical integration within the organisation. In this model there can be a strong focus on adopting a learning organisation perspective. This includes adopting a learning approach to strategy, proactively facilitating organisational change, nurturing learning in the workplace and at the worksite, encouraging greater individual responsibility for learning and assisting line managers in the creation of a culture or climate of learning.

These three models may encapsulate many of various approaches and orientations to learning found in organisations with functions directed towards learning however it cannot be overlooked in exploring the notion of learning in organisations that much learning is occurring in organisations where there are no specialist functions or specialist learning personnel.

Work by Australian researchers Field (1997), Gibb (1997) and more recently Harris, Simons and Bone(2000) have all put paid to the notion that learning and skill development is predominantly occurring in large organisations and that small organisations are not sources of learning and upskilling, a position seemingly apparent in many broad brush surveys of organisational activities. Field has pointed out that in small enterprises, at the individual level, employees learn from discussions with product representatives, supplier run seminars, completing innovative projects, helping others learn, participating in review meetings one to one coaching asking questions, experimenting or watching someone more experienced. At the firm level he argues that learning occurs from knowledge introduced from competitors or from customers, new approaches learned from previous business allies, learning new approaches from severe financial difficulties and during restructuring, from takeovers and changes in management.

Such diversity in models of practice therefore could be seen as posing another challenge for research looking at this aspect of the new learning professional given that the above models could be seen as suggesting different skills sets, working knowledge and attitudinal values of the part of practitioners. Such values about work performance and competences may emerge from nature of practice being supported in the organisation to which the practitioner belongs rather than emerging from the nature of the field of practice or expectations of a practice community.

REPORTED SHIFTS IN PREREQUISITE COMPETENCES OF PRACTICE

One way of clarifying the questions about the new VET or learning professional is to examine the types of competencies are associated with this role and the expectations of where this role may be going and the challenges confronting those within this role.

This has been a major strand of research conducted over the past decades by the American Society for Training and Development. Research conducted by this association in the early 80s reveals that the major focus of training and development practitioners at this time was on skill development and as a result trainers and developers required competences associated with more traditional fields of instruction and training.

By the end of the eighties there had been a shift in role emphasis. The 1989 study, which was similar in format to the earlier study, revealed that within the training and development role, there had been a shift to a focus to performance and producing quality related outputs.

A more recent study conducted in 1996 identified competences that its member practitioners saw themselves as needing to enact given the demands of a changing society and the change occurring in workplaces which reveals a further role shift. In this study the respondents identified that this role was about:

- Performing support services (which require competences in all interventions not just training)
- Using technology for delivery support (which required competences in technology planning and implementation)
- Managing human performance systems (requiring an ability to apply business systems skills)
- Promoting continuous learning at individual, team and organisational levels
- Managing changes processes (requiring capacities with technologies to facilitate change and change management consulting)

The report of this study further argued that the critical competences for practice included:

- An awareness of industry and corporations which included an understanding of the vision, strategic goals and culture and how to link practice with organisational goals more than ever before
- Management skills including leadership skills
- Understanding customer focus and project management skills
- Interpersonal skills and technological literacy
(American Society for Training and Development, 1996).

While there is no evidence of as substantial an investigation of Australian practitioners the US study, several smaller recent studies conducted with Australian practitioners (eg. Kostos1, 1998; Johnston, 1998) could be seen as suggesting some indications of role shift available from the US study although the small scale nature of these findings require further substantiation. The Kostos study, conducted using focus groups of learning and

development professionals with varying levels of responsibility from within both large corporations and small business, revealed that practitioners perceived that there had been a shift in the skills needed by those currently involved in this field of practice. The biggest change reported was the shift in practitioners from 'trainer to consultant'. This study also reported that the learning and development function required professionals to be more aware of business issues in order to make linkages in the delivery of learning; that practitioners needed skills in consulting, high level communication, analysis, resource and project management, using behaviour transformation approaches, organisational development/ managing change skills, the use of new technologies and to be able to manage cultural diversity.

Respondents to this research also nominated that learning and development professionals were requiring a refined capacity for knowledge management practices.

While such findings could be seen as warranting further in-depth research they certainly have some resonance with reportage from ASTD study and, interestingly, some of the claims made by Chappell (2000) that the new VET professional from educational institutions required significantly broader skills as part of their area of practice. The challenge emerging from these perceptions of the requirements for new skills sets for such practitioners for research will be to gather data from a sufficiently wide representation of practitioners to reflect current and emerging practice given the very unregulated nature of practice in organisations.

NEW UNDERSTANDINGS OF LEARNING

In exploring the notion of the new VET professional in the organisational context further issues arise. These issues are implicit in some of the profiling research reported earlier resulting from what could be seen as newer conceptualisation of learning. One literature that really challenging some of the traditional notions of what learning and development is or should be in the organisational context is the organisational learning literature. This literature while often confused in the way it considers the learning organisation concept (Garavan, 1997) regularly attempts to examine both the features that make for the more collective synergistic forms of learning that improve performance and the conditions and mechanisms that create such experiences. Models advanced for such sought after learning go well beyond pictures of organisations with well established systematic calendars of training events. They frequently involve the presentation of models that Mabey and Salaman (1995) suggest make the concept a piece of short hand to refer to organisations which try to make working reality of such attributes as flexibility, team work, continuous learning and employee participation and development. As such notions of building a learning organisation are seen as being associated with:

- fostering an environment of inquiry (Schuck, 1996; Watkins and Marsick, 1993, 1996)
- having a market orientation and a sense of entrepreneurship
- facilitative leadership

- organic and open structures and a decentralised approach to planning (Slater and Marvin, 1995)
- encouraging collaboration and team learning
- establishing systems to capture and share learning
- empower people towards a collective vision
- connect the organisation to its environment (Watkins and Marsick, 1993,1996)
- encourage a blame free culture which encourage experimentation (Denton, 1999),
- and see policy and strategy structured as a learning process (Coopey, 1996; Pedler, Burgoyne and Boydell, 1991)

As such a concept gains a popularity, at least in the rhetoric of organisations and literature about organisations, the role of those primarily responsible for learning could be seen as taking on new dimensions as the recognition of the complexity of fostering the type of learning sought in organisation expands and requires new relationships with other functions within the organisation and different mechanism to bring achieve the type of learning or performance being sought. As discussed earlier, if an organisations is aspiring to the type of learning as proposed by adherents to the 'learning organisation' philosophy those involved in the facilitation of this approach may well be located in positions outside traditional training and development functions, particularly in larger organisations.

WHERE DO THESE CHALLENGES LEAVE RESEARCHERS?

What we do know is that at a time when organisations, skill expectations of employees, the conditions of employment, the notion of career and the very nature of work itself is significantly changing, the nature of tasks associated with fostering learning within workplaces and the competencies required of practitioners responsible is also shifting, as are positional labels used to describe these practitioners and the practice environments in which they are working. It could be argued that a new form of learning practitioner is emerging in organisational contexts just as Chappell (2000) argued that a new form of VET professional is emerging from the restructured vocational education sector as a result of policy change and the opening up of the training and skill formation market. While much has been written and researched about the environment creating such change and revised policies concerning skill formation there has been less research and writing about how the role of those responsible for learning is evolving as a result of these changes. Similarly there has been little attempt to examine similarities and differences between the various segments of what could be seen as one broad arena of occupational practice. Research challenges, arising at least in part from the shifting nature of this comparatively unregulated field of practice as it is enacted in organisations, certainly exist and need to be addressed. However efforts in this directions are potentially worthwhile as such research could be seen to be as contributing a better understanding of the learning that is occurring in organisations and in institutions contributing to workforce capability building as a basis for the ongoing development of professionals who work in this area.

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