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## ABSTRACT

This document contains three papers from a symposium on different ways of learning. "How Engineers Learn in the Face of Organizational Change" (Robert Reardon) reports on a qualitative study during which nine engineers described how they learned to perform their altered roles after a major reorganization. The study findings supported current theory related to informal learning in the workplace and expanded on that theory by providing a new conceptualization of informal learning and the impact of organization structure on informal learning used by the engineers. "How Lesbians Have Learned to Negotiate the Heterosexism of Corporate America" (Julie Gedro, Ronald M. Cervero, Juanita Johnson-Bailey) examines the informal and incidental learning that 10 self-identified practicing lesbians experienced when dealing with human resource departments, during committee and group work, and at social/corporate events. "Internationalization: Learning Processes in a Greek Manufacturing Group" (Patricia S. Sherrer) discusses a qualitative study of the following topics: ways individuals learn cultures that are not their own; ways actual versus expected career path influences members of an organization that is undergoing internationalization; ways organizations undergoing internationalization use the learning of their own members for competitive advantage; and factors that align all elements of an organization with its international environment. All three papers include substantial bibliographies. (MN)

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# 2002 AHRD Conference

## Different Ways of Learning

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### Honolulu, Hawaii

### February 27 - March 3, 2002

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## How Engineers Learn in the Face of Organizational Change

Robert Reardon  
University of Georgia

*In this qualitative study, nine engineers were asked to describe how they learned to perform their altered roles after a major reorganization. A thematic analysis of the transcripts revealed that most of the learning was informal and that it fell into three categories. The participants revealed that the organizational structure facilitated two categories of learning and made one category more difficult. This study supports current theory related to informal learning in the workplace and expands theory by providing a new conceptualization of informal learning and the impact of the organizational structure on informal learning. HRD professionals may be able to apply these concepts to improve informal learning in their workplace.*

**Keywords:** Organizational Change, Informal Learning, Qualitative

The industrial workplace is a sea of constant change. Changes in business situations mandate process innovations to remain competitive or meet customer requirements. Engineers play unique roles in this environment. Management cites engineers working in industry as being key to innovation in industry (Hart, 2001). Since 1980, there has been a steady shift in research and development from government to industry (Hoyt & Gerloff, 2000). Creative skills have become critical to engineers working in industry. Yet, according to Hoyt and Gerloff (2000), pressure has increased on these engineers to be sensitive to the needs of the business – the “bottom line” (p. 275). Technological innovation gives the engineer new tools, new capabilities, and new responsibilities. Engineers must learn, then relearn, how to perform their roles in an environment that is more and more dependent on his or her performance for success. Often, learning roles occurs through informal or incidental learning. It is important for organizations to understand how this learning occurs, how this learning can be categorized, and what can be done to encourage informal or incidental learning.

### Theoretical Framework

Much has been written about workplace learning. Schön (1983) asserts that the experienced professional needs more than technical training. According to Schön, the experienced professional “reflects in action.” In this model of learning, the professional reflects on his or her actions in day-to-day practice to build a complex set of skills and tacit knowledge. This reflection does not come without a price. Hoyt and Gerloff (2000) identify technical obsolescence as a key antecedent to stress and burnout for engineers in industry. Engineers continually strive to learn new innovations to perform effectively in industry.

Technical skills are not the only skills needed by engineers. Senge (1990), for example, asserts that employees need to think systemically. Today in industry, engineers must be aware of the business needs as well as being technically competent (Hallam, 2000).

Some authors assert that much of workplace learning takes place outside of formal settings (Marsick & Volpe, 1999; Marsick & Watkins, 2001). Informal learning occurs among workers as they seek solutions to problems. Incidental learning takes place constantly, and the learner may or may not be aware of the process (Marsick & Watkins, 2001).

These same authors have specified six characteristics of informal learning. It is integrated with daily routines. It is triggered by an external jolt. It is not highly conscious. It is haphazard and influenced by chance. It is an inductive process of reflection and action. It is linked to the learning of others.

Marsick and Watkins have advocated organizational designs that encourage informal learning (Marsick & Watkins, 1999; Watkins & Marsick, 1994). These authors identify three ways to enhance informal and incidental learning (Marsick & Watkins, 2001). First, critical reflection in the workplace is key to allow informal learning. Second, the organization should stimulate learner proactivity to identify and learn new skills. Third, the organization should encourage creativity in the workplace.

Past research has identified disruptions to informal learning after corporate downsizing (Volpe, 1999). According to Volpe, the streamlined organizations changed the nature of work. At the same time, according to

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Volpe, there was a loss of formal and informal mechanisms for learning how to perform in the new environment. The people that formerly were resources were either gone or shifted into new positions.

### **Research Questions**

Informal learning is unstructured. Authors have identified some general ways that informal learning can be enhanced. Perhaps it is possible to enhance informal and incidental learning by identifying common categories of learning and how professionals actually learn. The purpose of this inductive study was to develop a rich understanding of how experienced engineers learned following an organizational change. Specifically, the study asked the following research questions. What categories describe the learning for engineers in this industrial setting? In each of these categories, how did these engineers learn to perform their role after the reorganization?

### **Methodology**

This was an inductive qualitative study to develop a rich understanding of the learning that took place at one manufacturing facility after a major reorganization. The study was based on interviews of nine experienced engineers. During the interviews they were asked to reflect on how they learned to perform their jobs after a major reorganization. The researcher conducted a thematic analysis of the transcribed interviews.

### *Setting*

Delphi Chemicals (a pseudonym) is a plastics manufacturing facility located in the southeastern United States. Since its construction in 1984 it has seen numerous changes. The site has had four owners, seen four workforce reductions, and received five major expansions. Typically, there were about 200-250 employees on the site. At the time of the reorganization the site employed 28 engineers. Engineers filled a number of roles at Delphi, which include management, technical support, project support, and production supervision. Most of the engineers were between 40 and 50 years old, were white males, and had more than fifteen years experience in the plastics industry.

From 1984 until 1994, the site organization was aligned with job functions. Engineering support was split among three departments. The Production Department had engineers to assist with operation of the chemical processes. The Maintenance Department had engineers to help with issues like preventive maintenance and repair of equipment. The Technical Department engineers ran projects, designed new systems, wrote environmental permits, and handled other strategic engineering needs.

In 1994 the management at Delphi decided that the existing organization needed to be restructured. They felt that the existing organization had too many layers, and that it was slow to respond to customer and market demands. One of the stated goals was to provide a natural organization focused on meeting the production needs of the site.

The resultant organization established two production teams. Each of the production teams had responsibility for one of the major product categories at the site. These teams had production and reliability engineers as members. For just over a year, a third, core team (Technical Services) provided engineering support for process, project, and control engineering applications. After the year, management of the site felt that this core team was not product-focused, so in 1996 the Technical Services team was eliminated and all engineering support was rolled to the two production teams.

### *The Interviews*

Ten engineers from the time of the reorganization still work at Delphi or live in the area. Nine of these were interviewed between June 2000 and June 2001. One engineer declined to participate in the study. All of the participants were white, male and between 43 and 51 years old. One of the participants had been laid off in 1998. One participant was on the management team that planned the restructuring and is still on the site management team. Eight of the interviews were conducted at the site by the researcher. One of the participants was the researcher. In that case, a third party conducted the interview using written questions.

The interview questions focused on how the engineers learned to perform their roles after the reorganization. There were also additional questions related to learning after other types of change. For example, one of the questions asked "How do you learn new technology when it is introduced to the workplace?" The audio tapes of the interviews were transcribed following each interview, and a preliminary analysis was done on the interview to identify emerging themes. After all the interviews were completed, the interviews were analyzed to identify themes

related to learning. Each theme was coded with a brief description and the supporting part of the interview was transferred into a database grouped by the descriptions.

After the themes were developed, the researcher reviewed the identified themes with the participants. Each of the participants agreed with the identified themes.

## Results and Findings

Analysis of the interview themes found that there were three categories of workplace learning for these engineers. In addition, these themes indicated some generalizations that could be made about learning at Delphi.

### *Three Categories of Informal Learning for Engineers in Industry*

Professional practice has been described as a complex artistry (Cervero, 1988; Schön, 1983). The skills needed by a competent engineer in manufacturing are not limited to the skills taught in preservice engineering curricula. Thematic analysis of the interviews revealed three general categories of learning for the engineers at Delphi Chemicals. These categories were learning new workflows, developing engineering expertise, and learning about the process.

*Learning New Workflows.* At Delphi, engineers needed to learn how to get things done. Almost every task required inputs and outputs. These engineers needed to follow procedures, accept new work assignments, plan their time, communicate, coordinate activities, and access additional resources. After the reorganization, established workflows were interrupted or disrupted. Most of the participants identified this as a major area of learning.

Each of the production teams had one specialist of each type. Each type of specialist had a different set of job functions that depended on his or her training and place on the team. Often, one specialist on each team was expected to perform tasks that were not done by anyone else on the team.

The interviews indicated two distinct types of learning for workflows. The first type occurred when the task was performed for the very first time in the new organization. The engineer could not rely on procedures, experience, or informal learning as a guide. The participants indicated that one of them had to forge ahead through the new organization. It was not always a smooth process. Usually, these "innovators" (Rogers, 1995) were experienced engineers who drew on analogies from past situations to apply to the current situation. In other words, they reflected in action. These engineers then became the educators and opinion makers for the other engineers at Delphi.

*Ben, a project engineer.*

"We learned most of that by doing, just by trying to execute and winding up with somebody saying you have to do this or you have to do that, and just coming as new, new knowledge at that time."

The second type of workflow learning took place after the "dust had settled" and workflows were established. Often there were formal procedures documenting the steps a specialist was to follow to do tasks in his or her area of expertise. The participants indicated that they rely on informal learning to discover how to get work done. They would ask a peer for guidance on how to accomplish the task. The only other engineer of that same specialty was the analogous specialist on the other product team. So, this informal learning was often peer-to-peer, crossing team boundaries.

*Tony, a project engineer.*

"Word of mouth, 'cause there is no serious effort to educate people about the, uh, the advantages, or disadvantages, of programs, or processes, or procedures that we use with our, uh, electronic solutions, so to speak. It's word of mouth that I find out from you, or somebody else, something they do that works. Or I ask a question, "how the heck do you do this?" And somebody shows me. That's about the only way that we do that..."

*Developing Engineering Expertise.* The knowledge required by an engineer at Delphi frequently changed because of changes in technology, government regulations, and business needs. Therefore, each engineer always had

to keep his or her skills up to date. The new, streamlined organization made it difficult to seek knowledge within the site. There were not very many engineers, there was little or no redundancy of roles, and everyone was very busy.

*Lance, reliability engineer.*  
 "...so my conduit over time became engaging in the plastics industry and engaging people that had specific knowledge of pieces and then giving them my perspective on the target and just engaging their expertise. So rather than go to expertise developed from within, I had to go to experts I became, you know, networked to outside to get that conduit..."

The engineers in this study proactively went outside the company to acquire new knowledge regarding engineering expertise. They did this by taking classes, talking to vendors, and networking with other engineers in industry.

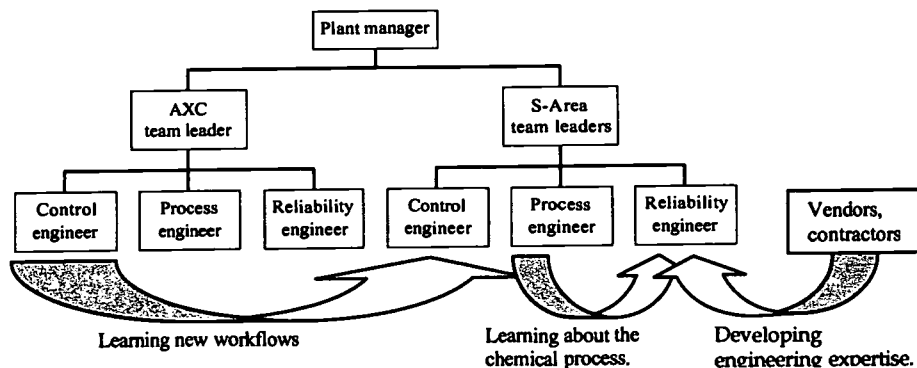
*Learning About the Chemical Process.* When the engineers at Delphi talked about "process" they were referring to the chemical process for which they were responsible. Each of the production teams was responsible for several chemical processes. Each processes had a multitude of distinctive characteristics. Employees working with a process were required to learn these characteristics.

Management stated that one of the intents of the reorganization was to improve the site's focus on these processes. Most of the engineers in this study identified this as a major success of the new organization. For example, although there is only one control engineer on each team, he or she could ask questions of his or her peers regarding the process. This encouraged all the engineers on a team to learn about the team's specific processes.

*Lance.*  
 "You know what the best part of the integration was working side by side with my peers that had other viewpoints and had other perspectives that could cover my blind spots. I may not have been good at certain things early on. I wasn't good at the process side for example."

These three classifications, learning about the chemical process, learning new workflow and developing engineering expertise, were identified during the interviews. Figure 1 demonstrates three characteristic flows of informal learning in a simplified organizational chart.

Figure 1. Simplified organization chart showing channels of informal learning.



As Figure 1 illustrates, the first category of informal learning, learning new workflows, usually took place between specialists, and might or might not cross team boundaries. For example, the control engineer on one team might explain an aspect of a computer program to the control engineer on the other team. The second category of learning, learning about the chemical process, usually took place between peers within a team. Figure 1 also illustrates the process engineer on one team explaining the process to the reliability engineer on the same team. The third learning category, developing engineering expertise, depended on the specialist seeking resources outside of



the plant boundaries. In addition, Figure 1 illustrates this by showing a vendor supplying information to the reliability engineer on one team.

#### *General Characteristics about the Informal Learning*

The interviews revealed four general characteristics about informal learning at Delphi that apply across the three categories of learning.

*Learning was informal and took place over time.* Engineers learned how to do their jobs after the reorganization in informal ways. This took place over a period of weeks or months. Typically these engineers learned from each other when they had a need. They sought out a peer skilled in the task at hand and asked for assistance. This was not the case for developing engineering expertise. The new organization did not support informal learning in this category, so the engineers had to seek new knowledge outside Delphi. They did this with informal networking or formal classes.

*Ralph, process engineer.*

"You know, I guess you learn a lot in everything, in every little type of work you do, you learn a lot from it, you know."

*Bill, team leader.*

"I think it was supposed to evolve over time and it was really supposed to happen at the team leader level and kind of in each department. I think we did do some of that and some of it seemed kind of like common sense."

*There was no learning up or down.* According to the participants, almost no learning moved vertically through the organization. It is almost all peer-to-peer. No one cited his or her supervisor as a source of learning.

*Ben.*

"So I think we tend to help one another on sort of a lateral basis, or even people that might work for us. As far as trying to push for a big conceptual education, I don't...I think people kind of shy away from that"

*Engineers Learned Only What They Needed to Do Their Job.* Engineers seek to learn what is needed to do their job: there is no time to learn things completely. This is typical of the adult learner, who displays a "readiness to learn" in order to "cope effectively with their real-life situations" (Knowles, 1990, p. 60).

*Ralph.*

"You only need to know the things that apply to our jobs and I think that would help you, just knowing, minimizing the knowledge you have to know to do your job instead of trying to learn things that, really, you'll never use. Like sometimes you get taught things in school you'll never use. But on your job, it's a waste of time"

*The Structure of the New organization made it very Difficult for Young, New Engineers to Learn.* People in the survey noted that it is very difficult for inexperienced engineers to survive in this environment. The experienced engineers felt that their workload makes it difficult to take the time to mentor young engineers. In addition, there is not a deep pool of resources on which to draw. Each team has a set of specialists, and those specialists are expected to perform as self-directed, competent individuals. So it is difficult for new engineers to learn their roles in this environment.

*Lance.*

- L: "Developing new personnel is very, very difficult. Very, very challenging environment and we do not do a good job of developing people."  
I: "Because of..."  
L: "Because we have so much going on and we have...it's so quick, I mean, you truly learn by living through things."

*Lack of Steps to Enhance Informal Learning.* The participants in this study were able to describe numerous examples of informal learning. This agrees with the description of informal learning in Marsick and Watkins (2001). One of the criteria of informal learning is that it is often "triggered by an external joint" (p.28).

In the same paper, Marsick and Watkins describe three ways to enhance learning: critical reflection of the skills needed to perform, proactivity by the learner to acquire needed learning, and creativity to explore new options. The participants in the study indicated that they were able to create new workflows and explore new performance options. They were also proactive in learning that which they needed. This was not, however, consciously encouraged by the organization, but may have been an artifact of the experience of the professionals in the study. There was no evidence of critical reflection discussed during the interviews.

### **Implications**

The engineers at Delphi relied on their individual experiences as professionals and an informal network of peers and external experts to learn after the reorganization.

### *Implications for Practice*

This study demonstrates that organizational structures can shape informal learning. The management at Delphi appeared to have been aware of this as they sought to build an organization that would better support the chemical processes. It is important for HRD professionals to keep this in mind as their organizations are redesigned to achieve goals such as reorganization, downsizing, acquisition, or expansion.

The engineers in this study relied on experience and tacit knowledge to build new networks for informal learning. Failure of new hires to succeed in this environment dramatically highlights the value of experience in this environment. The failures and successes of informal learning in this study illuminate areas to which HRD professionals should attend when dealing with engineers in an industrial setting. First, they should identify the categories of learning that engineers need to perform their roles. Second, the HRD professionals should identify channels for this learning to occur. For example, in the Delphi study, there were no informal channels to develop engineering expertise after the reorganization. Formal training opportunities are one solution for this.

HRD professionals should work with engineering professionals to enhance informal learning. The recommendations of Marsick and Watkins (2001) would be a good starting place. Engineers should be taught to reflect critically on their learning needs in their work environment. They should be encouraged to proactively acquire the knowledge that they need (either informally or formally). Discussions with their managers should include learning and development needs. Collaboration and cooperation among peers should be encouraged to stimulate informal learning.

### *Implications for Research*

This was a small study of a small facility over a short period of time. The participants represent a small demographic group (white, male engineers between forty and fifty years old). Further research should attempt to categorize informal learning in other settings and with participants from a more diverse background.

This study suggests that organizations and resources can be aligned to maximize informal learning. Research should be done to determine if this is true. Ideally, an experimental design would be best. It is unlikely to expect a company to reorganize to satisfy research goals. An alternative study would be to work with a company that is planning reorganization. The researcher should try to predict categories and flows of informal learning in the new environment. Then the researcher should monitor the new organization to determine if the channels of informal learning develop as expected.



## How this Research Contributes to New Knowledge in HRD

This study contributes to knowledge in HRD in two ways. It supports existing concepts of informal learning and it expands on that concept by demonstrating that informal learning can be differentiated into different categories.

### *Support of Existing Theories Related to Informal and Incidental Learning.*

The learning described by the participants agreed well with the characteristics of informal learning proposed by Marsick and Watkins (2001, 1999). It occurred in the midst of the normal workday. It was linked to the learning of others. Often, it was not highly conscious. Since it took place as needed, it was influenced by chance. It was definitely triggered by the reorganization. The participants noted that it was sometimes a case of reflection in action.

### *This Research Suggests New Structures for Considering Informal Learning.*

Workplace learning can be categorized. Prior research on informal learning did not seek to categorize types of learning. In this study the participants identified learning new workflows, developing engineering expertise, and learning the chemical processes.

In practice, this study suggests that organizational structures and resources can be designed to support or enhance a particular category of learning. At Delphi, the management wanted to enhance the support of production goals. According to the participants in the study, the modified structure made it much easier for the engineers to learn about the chemical processes for which they were responsible. The same participants reported that the modified organization made it harder for these engineers to continue to develop their engineering expertise.

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## Appendix: Interview Guide

Today, I am interesting in hearing how you adjust to change in the workplace. Specifically, I would like to hear about your perception of the reorganization of the plant in 1996, how it affected your job, how you responded to it.

- Tell me about how the reorganization affected you.

- How did you learn to do your job after the change? Was there formal training or education? What other informal ways did you learn?
- Were there problems with adapting to new change? Were you able to solve them? How?
- What could have been done to make the change “better?”
- Did the company support your adaptation? Tell me how.
- Tell me a little of your background.
- How long have you worked as an engineer?
- What is your background?

I want to shift gears and ask you a couple of questions about new technology. I will be researching how people adapt to new technology, and your answers will help guide me as I start this research.

- Describe a time when you had to start using a “new technology.” How did you learn to work with it?
- What has been the best way for you to learn new technologies?”
- What should the company do when it rolls out new technologies? (classroom training, online help, mentoring, hot lines)

## How Lesbians Have Learned to Negotiate the Heterosexism of Corporate America

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*This paper examines the informal and incidental learning that lesbians experience in order to negotiate the heterosexism of corporate America. This paper will discuss heterosexism and its pervasiveness in the corporate setting; it will examine the double challenge of lesbians who work in the corporate setting; what lesbians have learned about negotiating the corporate setting, and how they have learned to negotiate the setting.*

**Keywords:** Lesbians, Corporate America, Informal and Incidental Learning

To be same-sex oriented in a society that is undergirded by the heterosexual assumption is a stigma. For centuries gay and lesbian couples have formed and maintained relationships outside legislative and social approval (Johnson, 1996). Reflecting the norms of the wider society, corporate America is also characterized by heterosexism, sexism and the resulting interlocking systems of power (Badgett, 1995; Digh, 1999; Herek, 1989; Fassinger, 1995; Hill, 1995; McNaught, 1993; Miller, 1998; Swisher, 1996). Due to these interlocking systems of compulsory heterosexuality and sexism (Miller, 1998), both formal and informal methods of discrimination exist in corporate America. Formal discrimination often involves employer decisions to fire or not hire someone due to their sexual orientation as well as being passed over for raises, promotions or increased job responsibilities (Croteau, 1996). Informal discrimination includes verbal harassment, property violence, and loss of credibility or respect by a co-worker (Morgan & Brown, 1991). Today, no homosexual is explicitly protected from workplace discrimination at the Federal level, although many organizations now have their own individual anti-discrimination policies.

Gays and lesbians, therefore, who work in corporate America must negotiate the heterosexism of their environment through a multiplicity of strategies including passing as straight, closeting, hiding, lying, dropping out, and coming out (Adams, 1996; Boatwright, Gilbert, Forrest, & Ketzenberger, 1996; Driscoll, Kelley, & Fassinger, 1996; Fassinger, 1995; Friskopp & Silverstein, 1995). Lesbians are doubly challenged because of their gender as well as their homosexuality (Driscoll, Kelley, & Fassinger, 1996; Morgan & Brown, 1991). Gay women executives are slower than gay men to make their sexuality known because they differ not in one but in two important ways from straight male executives, who still tend to surround themselves with similar colleagues at the very top of the ladder (Swisher, 1996). Lesbians, therefore, working in corporate America constantly negotiate the multiplicity of variables that can potentially detonate their careers. This negotiation process is arguably no different than the general experience of lesbian life in the larger society.

Because lesbians face the double bind of gender and sexual orientation discrimination, they are a unique category of professionals. Each lesbian who works in corporate America must learn through trial and error, underground networking, or other informal means how to negotiate the workplace. The purpose of this study, therefore, was to understand how lesbians learn to negotiate the heterosexism of corporate America. The research questions were: 1) What have lesbians who work in corporate America learned about negotiating the heterosexism of the organizational setting, and 2) How have they learned to negotiate the heterosexism of the organizational setting.

### Methodology

A qualitative research design was selected for this study in order to uncover that meaning embedded in people's experiences (Merriam, 1998). A purposeful sample of ten lesbians who work in corporate America was used in this study. Ten were selected because by the seventh interview noticeable themes, words, and phrases were being repeated. Three more interviews were done in order to assure that data saturation (Merriam, 1998) was reached. The criteria used to select the women for this study were: 1) self-identifies as a lesbian; 2) is over the age of thirty; 3) has worked in the same corporate setting for a minimum of two years; 4) has budget responsibility; and 5) has more than two people who report directly to her. The women must self-identify as practicing lesbians. The study excludes

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women who think they might be lesbian, or who have had lesbian experiences, or who are bisexual. The second criterion was that the women were over the age of thirty because younger lesbians do not have enough experience in the work setting to provide a frame of reference for this study. The third criterion was that the lesbians sampled have worked at their present company for at least two years in order to have developed opportunities for learning. The fourth and fifth criterion—budget responsibility and a minimum of two direct reports—defined a research participant as a corporate member who has a fiduciary responsibility and accountability to the corporation.

The women are positioned from a structural standpoint (education, management authority) to be in positions of organizational power, with all being managers and some being at the executive level. While not specifically by design, all of these women have undergraduate degrees. Six out of ten of them have advanced degrees. Moreover, three out of ten of the women have been at their current organization for over ten years (Janet, Sharon and Pam) and all of them have been in current industry/profession for over five. What these profiles suggest, is that one key success factor in learning to negotiate the corporate setting is a strong educational background and a stable work history.

A semi-structured interview format (Merriam, 1998) accompanied by an opening statement and an interview guide was used in this study. The interview guide consisted of two parts: 1) general, demographic questions related to career and type of organization, and 2) questions related to experiences and learning in the corporate setting. Data were analyzed using the constant comparative method of analysis. The constant comparative method involves comparing one segment of data with another to determine similarities and differences (Merriam, 1988). The goal of this analysis was to make sense out of the data by determining categories and themes, reducing and refining those categories and themes until there are linked in a way which explains the data's meaning.

### **Background of the Study**

The concept of heterosexism provides the scaffolding to understand the experience of a lesbian whose identity places her at the intersection of gender and sexual orientation in the corporate setting. Heterosexuality is the compulsory norm for society; corporate America, being a subset of American society, is also characterized by compulsory heterosexuality (Caudron, 1995; Digh, 1999; Friskopp & Silverstein, 1995). Heterosexism is a worldview (McNaught, 1993) and for most people, it is probably not even conscious. Heterosexism is not always a simple, benign, innocent posture. Rather, heterosexism is the belief that heterosexuality is actually *superior* to homosexuality and should be an enforceable social norm (Badgett, 1995).

Negotiating organizational life as a gay person in the face of heterosexist norms is a constant process of identity management and underground networking (Schneider, 1982). Signs of sexual orientation other than heterosexuality are rarely tolerated in the corporate setting. Although relatively little research has been done regarding gays and the workplace, what has been done suggests that gays and lesbians are expected to conceal their marginalized orientations from organizational view (Schneider, 1982). Because of this lesbians face a number of unique considerations when developing their careers in business. Lesbians often avoid divulging their sexual orientation in order to avoid harassment, rejection, and violence (Caron & Ulin, 1997). In a 1992 survey, 38 percent of lesbians who responded said the need to hide their sexual orientation was a constant source of stress on the job (Winfield, 1995). In addition to using passing strategies mentioned heretofore, many lesbians negotiate corporate America by opting out of it altogether (Fassinger, 1995; Morgan & Brown, 1991).

There are no formal or institutionally sponsored programs in existence that address the unique needs, concerns, and challenges of lesbians in the workplace. Until formal training and education programs are developed that address the issue of lesbians in corporate America, lesbians have only their experience to draw upon as educational tools. Therefore, this study used the Watkins and Marsick (1992) model of informal and incidental learning to understand the processes of learning. Watkins and Marsick posit that the central feature of informal and incidental experience is learning from and through experience. Informal learning means learning that is experiential and non-institutionally sponsored and includes learning by trial and error, mentoring, and coaching. Incidental learning is learning that occurs as a byproduct of some other activity, such as task accomplishment, interpersonal interaction, sensing the organizational culture, and trial-and-error experimentation.

### **Results**

The first section discusses three themes about what lesbians who work in corporate America have learned about negotiating the heterosexism of the organizational setting. Section two presents the analysis of how they have learned.

*What Lesbians Have Learned*

Table 2 presents the three main themes that answer the first research question. Lesbians in corporate America have learned to pre-screen, to come out, and to educate others to the issues related to being lesbian.

**Table 2. What lesbians in corporate America have learned about negotiating heterosexism**

What is learned	When this occurs	Factors for Occurrence
<b>The Pre-Screen:</b> Gathering data in order to analyze receptivity of audience toward one's lesbianism.	Anytime one enters a new relationship (individual: colleague, superior, new group of subordinates; or group: new organization)	Visual: Symbols, speech or dress that would indicate intolerance for alternative orientations.  Behavioral: Person's demonstrated openness toward new ideas. Political views (Conservative/Liberal). Hobbies/interests: metaphysics, New Age, alternative pursuits.
<b>The Coming Out:</b> Situational process in which a lesbian acknowledges her lesbianism.	Occurs after she has pre-screened the audience and there is a compelling or otherwise appropriate motivation to identify oneself explicitly as a lesbian.	Power balance: Facilitated by the other person/group disclosing sensitive or otherwise vulnerable material.  Establishment at Organization: Facilitated by one's expertise in field and the establishment of relationships.
<b>The Education of Others:</b> Willingness and Ability to Serve as Change Agent for Heterosexuals' Sensitivity to Issues Related to Lesbianism	After the pre-screen, and after one has come out individually	A recognition of the significance and responsibility of one for educating others for not just one's own career survival or success, but for lesbians in a collective sense.

*Learning About Prescreening.* It is evident that as a lesbian conducts day-to-day business transactions she must deal with the fact that she is a gay woman in a straight male world. Being a lesbian is a ubiquitous component of virtually every relationship and nearly every task in her corporate life. This requires an understanding of how, when, why, what, and who to reveal material about this important personal characteristic of her life. The first activity that these women have learned is to pre-screen a superior, subordinate, or even an organization, in order to get a "read" on what the response will be if she makes her sexuality known. Corporate lesbians have learned to read a situation first before speaking or acting; thus this is the first part of the negotiation process.

Walking into a business trip, a business deal, an employee meeting, a sales call, or a monthly financial reporting meeting, involves skillful assessment of the possible ramifications of identifying one's lesbianism. There is much at stake for walking blindly into a transaction without this understanding. When meeting a new person, Liz looks for indicators of the person's general tolerance:

I listen to people before I engage with them. So if I sense a lack of tolerance for certain kinds of things, people, music, art, a total focus on themselves, who they peer with, kinda gives me give me a clue that these are people are...there's a vibe. There's just a vibe.

Pam's learning has hinged upon her caution around the issue of the timing, circumstances, and parties to whom she comes out:

So, the management chain in which I report up to, pretty much every one knows. The people who report to me, pretty much every one knows. The people who I've worked with several years, pretty much every one knows. But it's not the kind of thing like when I'm into a new position I don't announce it immediately. It's the kind of thing if somebody starts out asking questions about my life, I don't hold it back but I also have it's a little bit of a protection device on I'm not



going to announce that first thing. I'd rather for the person to get to know me and to from a work perspective get to know my work before they categorize me.

Pam is so careful with her pre-screening that when asked her if she had any regrets or any experiences with respect to negotiating her lesbianism and disclosing her orientation to an associate, she said:

I can't think of anything. I'm just so careful. One time when I was talking to a therapist she said, "You think about everything you do before you do it." And I think she said, "You're a thinker."

And I think especially with that issue, I'm really really careful.

So the main aspects of the pre-screen are determining how ostensibly safe a person or an organization is by screening for how open someone would be to the idea of one's identification as a lesbian. These women have learned that it pays to stay in control of conversations and transactions with colleagues and supervisors. One's work speaks first, then one's voice can follow in the appropriate time and the appropriate place.

*Learning About Coming Out.* A woman is inevitably going to reach a point where she feels that the time is right to explicitly reveal her lesbianism. All of the women are out at work. Their peers know, their bosses know, and their subordinates know. While most or probably all of them used skillful timing and communication with respect to coming out, all of them ultimately were out. There were no stories of trauma or of disaster. There were no stories of being fired, or downgraded in their position. Rather, the coming out stories were sometimes very "happy" stories, sometimes borderline-humorous, and at worst, they were neutral. All of these women identified that their initial coming out incidents gave them courage, incentive, skill, and motivation to come out in larger capacities.

Susan and Kim both identify the importance of timing, sensitivity, and finesse with respect to coming out. Both were concerned that they needed to come out so that if their lesbianism were raised to their bosses, and they hadn't been informed, their bosses would defend their reputation as heterosexuals. In order to proactively manage the boss's reputation and credibility as well as to maintain collegial trust, Susan advised her superiors of her lesbianism:

I wanted to tell my boss. Now, up to this point I had just told my peers. I didn't tell my boss...she's one of these people like if someone were to walk up to her and say "I just heard, I just read that Susan was gay." She would say "Absolutely not! I can't believe you'd say that!" You know, she'd defend me. And I didn't want her to embarrass herself by thinking she was being protective and in reality, it's like "no, I am." So I told her about it and she was fine with it.

Kim observes in a more abstract way the importance of understanding the ramifications of how, when, where, and why one comes out:

It's important to understand that every action has consequences. And you need to think about those. If you're gonna come out in a big public way that makes somebody look foolish, you need to think about that. I mean foolish in the sense that you know, if you've been workin' for somebody for a long time and they think they know you and all of a sudden they realize they don't know you, they look foolish. I think you need to understand that if you want to be extremely political, there may or may not be a place for you in your organization.

In both Susan and Brooke's coming out at work stories, their strategy was to "act normal." They both conducted themselves in ways that communicated the fact that they felt neither self-conscious nor disempowered by their lesbianism. This self-composure was in both cases met with respect, and both women gained support and rapport with their colleagues.

Sharon, while working for a defense contractor, had to undergo a rigorous security clearance. During the security clearance, because of the question "Have you ever sought counseling?" When she responded affirmatively, the interviewer asked her for what purpose and she was put in the position of coming out. She ultimately had to list every "roommate" (lover) she had had to the interviewer. Nevertheless, Sharon got the requisite clearance:

Would that be Susie your roommate? I went "Yes." So we went back through the whole thing.

And every time there was a female he asked was that a lover. And I had to answer. So it took five and a half hours. Because he said, "you've been... He asked me well are you out to your children?

Are you out to your parents? Are you out to...". I had to answer in fact I was.

In these experiences of coming out, each woman's experience had its own unique setting, characters, and specific events and circumstances for the coming out process. However, all were resolute and honest with respect to claiming their sexuality—that is, not one of them lied, passed, hid out, or closeted themselves. In fact, coming out at the individual level gave the women the courage, the skill, the leverage, and the motivation to move into a position of serving as educators around the subject of lesbianism in general. The women wanted to sensitize their colleagues, superiors, subordinates, and clients as to not only their individual identities, but also about the issues and challenges faced by the collective lesbian population.



*The Education of Others.* The women learned they had a commitment to serving as change agents by educating others about the unique issues that corporate lesbians face. These successful corporate lesbians see that it is not enough to come out individually, but it is incumbent upon them to come out for the collective good. Mary Ellen identifies her responsibility as a powerful corporate lesbian to educate others about the marginalization of lesbians and that they can lead normal, happy lives:

Up on my web site it talks about my partner and my kids. My partner and my kids come to work. And when you do things like for example, contribute the amount of money we did to [Political cause X], clearly that's a different level and I have responsibilities to the association, the shareholders, the customers and things and I have to think about things that I do.

Janet explained very clearly how she came to embrace her role as an educator in her corporate setting for lesbian and gay issues:

I watched these employees who dripped of courage, determination, courage...So I sat there and I thought you know between the higher purpose in my life, in a very visible, senior position and I had the opportunity to work with these employees, with management to take this really to another level. So it was so obvious to me that I needed to come out you know for myself for the impact that it could have.

Janet's inspiration and motivation came from a recognition that there were lesbian and gay employees at her organization who had much more to lose by coming out than did she. She recognized that her rank placed her in a position to significantly affect change.

*How Lesbians Have Learned.* The learning that the women experienced took place in their interactions during the course of their workdays and not through formal programs of learning because such programs do not exist. Thus, corporate lesbians have instead learned informally and incidentally how to negotiate the heterosexism of their corporate organizations. Table 3 illustrates the three key types of events through which the women learned about successfully negotiating their organizational settings and the corresponding mode of learning. There were several examples of incidents relayed by the research participants, and these incidents are chosen to be illustrative of the patterns of learning they experienced.

Table 3. *How lesbians have learned to negotiate the corporate setting*

Type of Event	Description	Major Type of Learning
Dealing with Human Resource Departments	One's lesbianism comes up during the discussion or negotiation of moves, transfers, or reporting relationships.	Informal
During Committee and Group Work	By affiliation with special groups, Boards, and such, the subject of one's lesbianism becomes germane.	Incidental
At Social/Corporate Events	Holiday parties, happy hours, etc. often include spouse. Women many times take their lovers.  During casual conversation, mention lovers. No hiding of orientation.	Incidental

*Dealing with Human Resources.* Much of the learning that the women experienced involved dealing with their Human Resources Departments on such matters as relocation, benefits, and staffing. On all of these occasions, the women were seeking information in their interactions with their Human Resources' associates. Hence, the learning in this category was categorized as informal. The interactions were initiated because someone was seeking to learn something—whether it was asking for information about relocation assistance for a lover, making a new hire, or asking about domestic partner benefits. Sharon learned through an adversarial encounter with a Human Resources Manager about negotiating her identity:

So they start talking about me hiring friends on the contract. Now they're not talking about what is really happening—they are dancing around it. Right? So "It's been noticed that you're hiring friends on the contract. The nepotism on this contract is just running wild." I said, wait a minute!

Have we had a paradigm shift here? A year and a half ago we had posters on the wall saying "bring your friends to work." I thought that was what we were trying to do.

Sharon's experience with her HR manager was an example of informal learning because the conversation was intended to deal with her recruitment of acquaintances.

*During Committee and Group Work.* Much of the learning that lesbians have experienced has occurred as they are participating in committee work and other types of group work. While some of the committees and groups directly involve the issue of lesbians and gays in the workplace, there are also examples of learning that took place as the women worked in mainstream, traditional types of committee and group work. Learning during committee and group work resulted in incidental learning.

Mary Ellen said that she is heavily involved in committee and group work both within her organization and also in her community, and has learned about negotiating her lesbianism in a powerful way:

I had a former Board of Trustees come over and want to talk about relationships, whether I play a bigger role. I serve on the University Athletic Board and couple other things and I said well you know frankly for the gay and lesbian population they feel really disenfranchised and went on about that and you know because I'm perceived as a competent businesswoman and a visible executive, they think I'm a person of wealth. All those things somehow mean they have to figure out how to deal with me if they want a chance to have my money and my name.

Mary Ellen's learning through her committee and group work was incidental because as she served on various boards, the subject of her lesbianism would inherently arise because of her activist stance. The learning was incidental because her own coming out was a byproduct of another activities—such as contributing money to various causes and for various projects.

Janet learned that her fears around coming out were, as she said, "Larger than life." As she examined her own self-consciousness around being a lesbian in a predominantly heterosexual businesswomen's alliance, Janet felt trepidation about coming out within this group because she thought that her openness about her lesbianism might scare off her straight peers in the group. However, she came out to her group and was met with sensitivity and concern. Janet, then, learned incidentally of her group's tolerance and sensitivity toward her lesbianism because she had reached a critical moment in her lesbian identity that would not allow her to remain in the closet within and among her cohorts in this group. The main activity that Janet participated in was coming out to this group of people who were so important to her. The by-product of that activity was that she learned how receptive the group was to her lesbianism. Thus, her learning of the inclusion that her straight associates genuinely felt—demonstrated by their visible upset at not having addressed the subject themselves—was byproduct of Janet's coming out to them.

*Social/Corporate Events.* Another way that the women learned about negotiating the heterosexism of the organizational setting involved their experiences during organizational functions such as holiday parties as well as during routine social activities such as lunches and dinners with colleagues and superiors. These social activities, whereby the emphasis was not directly on work tasks or responsibilities, lent themselves to a freer exchange of conversation and arguably more opportunity for "exposure" (whether wanted or unwanted) of their lesbianism and all the resulting and necessary negotiation around that subject. The learning that occurred during social/corporate events was incidental to the primary purpose of attending the events.

When Jennifer described her experience with the co-worker who had asked her about the "wildest thing she had ever done," she learned incidentally that she was comfortable coming out to someone when they divulged equally sensitive information about themselves. The reason that this learning was incidental is because Jennifer's lesbianism came up as a result of a casual conversation, not particularly intended to gather information around the subject of her lesbianism. Again, learning through a social context outside of work—having lunch with a colleague—resulted in incidental learning:

Pam, too, learned about coming out during a social event (lunch with an employee):

With an employee that works for me, we were at lunch and I hadn't come out to him and he had been with the company maybe four months or something like that and he was talking about him and his wife and he happened to be talking about the gay area of town. Not calling it the "gay area of town" but you know that he and his wife like to go to a restaurant down there. I said, "Oh, we go there a lot too." And then I just threw in, you know, that's kind of the gay area and I happen to be a lesbian and I like that restaurant cause I feel so comfortable there. From then on, I wasn't having to hold back anything.

Pam's learning about coming out to a new colleague as they were discussing favorite restaurants and neighborhoods was another example of incidental learning, because Pam's learning of her subordinates' receptivity to her lesbianism was a by-product of the main activity, which was their business lunch.

## Discussion

We discuss three overall conclusions based on the results of the study: 1) It is difficult for lesbians to negotiate the heterosexism of the corporate environment; 2) Lesbians in corporate America have learned how to negotiate strategically the heterosexism of the corporate environment through informal and incidental learning; and 3) Lesbians who are succeeding in corporate America take responsibility for educating their associates about issues related to lesbianism.

The evidence from this study suggests that corporate America continues to be a bastion of heterosexism (Boatwright, Gilbert, Forrest, & Ketzenberger, 1996; Chung, 1995; Fassinger, 1996; Morgan & Brown, 1991). The women in the sample experienced heterosexism as they negotiated both the mundane tasks associated with their jobs as well as the larger issues related to their overall careers. Although these women were in high-ranking positions, with the power and privilege that ostensibly accrues to holders of such positions, they nevertheless had difficulties in negotiating the heterosexism of their organizational settings.

While the women in this study are all out lesbians, they are cautious and strategic about coming out. The process of coming out is not a static, finite process. Rather, coming out is an iterative process that is negotiated every time a lesbian enters a new situation such as a new organization, workgroup, client, superior, subordinate, or committee. The literature speaks of coming out strategies (Fahy, 1995; McNaught, 1993; Signorile, 1995) in terms of providing prescriptive measures that a gay or lesbian can do to come out. Yet there is little if any literature that addresses the complexities and contingencies of the corporate setting, where people's views, beliefs, and reactions are mixed. The experiences of coming out described by the women in the study substantiate the literature that describes the coming out process as a risky endeavor because doing so potentially jeopardizes career mobility and opportunities (Fassinger, 1996; Folbre, 1995; Morgan & Brown, 1991; Welch, 1996). In other words, the women were constantly aware of the risk involved in coming out and they moderated that risk with their pre-screens. In doing so, the women successfully used caution, assessment, and strategy when coming out in order to mitigate any adverse affects on themselves or their careers.

Lesbians have learned informally and incidentally to negotiate the heterosexism of their organizational settings. Therefore, the lesbians who do succeed in such negotiations are involved in a process of learning that began upon their entrance into their organizations and continues for them. In the absence of any formal training or education, therefore, these women have learned through their experiences how to successfully negotiate their organizational settings. Informal learning includes trial and error learning; mentoring; and coaching; whereas incidental learning is learning that occurs as a byproduct of another activity (Watkins & Marsick, 1992). Sometimes their learning is actually intentional as they seek information (such as dealing with Human Resources regarding benefits information and such) and many other times, the learning happens without plan, and because the subject somehow came up and the women had to handle the issue.

It was not enough for the women in this study to come out on an individual level. Rather, they felt a responsibility for educating their associates about issues and matters related to being lesbian. This education fell into two categories: 1) serving as educators by being living examples of lesbians who were "normal people," and 2) directly educating by teaching other organizational members about heterosexism and addressing issues of being a lesbian in the corporate setting. The responsibility felt and demonstrated by the women connects to the literature on lesbian identity development because only by having strong and cohesive self-concepts as professionals and as lesbians did they have the courage and integrity to serve in such a role. The literature on lesbian identity development describes stages (Fassinger, 1995; Mobley & Slaney, 1996; McNaught, 1993) which progress from awareness of same sex attraction to acceptance to synthesis and integration into a lesbian's psyche, behavior, and interaction with others. The women in the study were at the highest stage of lesbian identity development, in which their awareness and integration of their lesbianism was complete. Because the women were comfortable with themselves and their orientations, they could with facility bring about awareness and education to their associates about issues of homophobia and heterosexism. After all, it was not enough, after coming out individually, for them to come out. They felt that when a teachable moment presented itself—that is, an opportunity to teach an associate about an issue that had probably not crossed their mind—they were responsible to provide this awareness for the sake of other lesbians.

The implications of this study for Human Resource Development are that lesbians in the corporate setting need to be recognized by HRD researchers and practitioners as a unique group and not subsumed into the grouping of

heterosexual women or gay men. They need to be studied as a separate group so that HRD can address those unique differences and needs. The learning needs of lesbians in the corporate setting must be made part of the HRD training and development agenda. Moreover, the training and development agenda must involve the entire organization and not just for lesbians, in order for HRD to make a meaningful impact, as the heterosexism of the entire organization is what creates and perpetuates the unique learning needs of its lesbian members.

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## Internationalization: Learning Processes in a Greek Manufacturing Group

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*This qualitative study based on gaps in the literature tested individual and organizational learning theories for use by HRD professionals in the practice of facilitating internationalization. Research on topics about cognitive, reflective processes in internationalization lag behind that of behavioral dimensions. Participants report leadership practices and identities of expertise influenced by Greek culture, incidental learning of other cultures, and individually motivated career paths in an implied context. Cultural influences of learning processes need more study.*

**Keywords:** Internationalization, Organizational learning, Cultural learning

Findings help HRD practitioners understand those engaged in internationalization and proposes how culture influences individual and organizational learning processes during this change.

### Problem Statement

Based on gaps identified in the literature the purposes of the study are first to increase our knowledge of new theory in the facilitation of internationalization change. Then it attempts to gain a holistic, contextually grounded view of the internationalization process for both individuals and organizations outside the U.S. Finally, it proposes to extend prior research in internationalization processes and cultural learning with the aim of improving practice of those HRD professionals engaged in internationalization change.

Internationalizing organizations are *learning to be* international from the first cross cultural interaction, however, research is more often focused on active, visible *doing* elements of this change in studies with topics about structure and strategy. International joint ventures and strategic alliances (Barkema, Shenkar, Vermeulen, & Bell, 1997; Larsson, Bengtsson, Henriksson, & Sparks, 1998), international (Barkema & Vermeulen, 1998) as well as domestic (Greening, Barringer, & Macy, 1996) expansion decisions have recently begun describing organizations as systems of learning. Briody & Baba (1994) in a study of U.S. and international merging divisions found knowledge, experience, and collaboration to be recognizable types of learning in internationalizing organizations. Theory has not been used in these instances to offer simple explanations, define applied problems in new ways, or help to focus on problem solutions by discerning priorities (Campbell, 1990).

Research on links between individuals and organizations suggest mutual influences occur during organizational change through organizational processes. While individuals report that collaboration and leveraging of cultural differences are reported as useful in reaching internationalizing goals (Center for Creative Leadership, 1997; Yeung & Ready, 1995), U.S. repatriates report varying organizational attitudes about what skills repatriates have to offer on their return from assignments (Black, 1992; Briody & Baba, 1994; Harvey, 1989). Other implicit organizational processes such as perceptions of career path or status acquisition were found defining attributes of employment in a U.S. organization during organizational change (Briody, Baba, & Cooper, 1995). Another study found internationalizing employer practices to be mediators of expatriate organizational commitments (Guzzo, Noonan, & Elron, 1994). Eisenhart (1995) found that individuals through production of new ideas and public performance add to collective ways of thinking and acting thereby changing culture in organizations. Research is needed to further explain what processes facilitate internationalization change between individuals and organizations.

Individual internationalization processes have been studied as isolated, behavioral topics, without theory (Black, Gregersen, & Mendenhall, 1992; Mendenhall, Beaty & Oddou, 1993) and in largely American owned organizations (Adler & Boyacigiller, 1996). These studies of cross-cultural training (Black & Mendenhall, 1990), expatriation (Black, 1992; Briody & Chrisman, 1991; Dunbar, 1992), and repatriation (Harvey, 1989) found the routine need and use of cultural knowledge as people work in ambiguous intercultural situations. Cultural learning study among American expatriates (Taylor, 1994) and subsequent review (Taylor, 1997) calls for more holistic and contextually grounded study. In this manner, a qualitative case study exploring how individual learning processes based on theory facilitates internationalization in a context outside the U.S. was needed.

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## **Theoretical Framework**

Two untested theories are used as frameworks for this study. First Cowan's (1995) theory of organizational learning was chosen because it is based on the thinking of indigenous people; developed over generations of observation it describes how organizational wisdom might be created. Then Tomasello, Kruger, & Ratner's (1993) theory of cultural learning was chosen because it theorizes how we first learned our own cultures; learning unfamiliar cultures is proposed for study as a similar process.

Cowan describes wisdom, not as expertise but built on a collective, collaborative behavior, and thinking in organizations among knowledgeable and experienced people where comfort with ambiguity is desired. Cowan's explanation of *how* learning in organizations takes place is outlined as forming connections between organizations and individual members: a) developing a *both, and* mentality that is moving from a separation of learning and performance to learning from every organizational relationship, b) replacing linear, experts with circular models of reexamination, reformulating, rethinking what has been learned, while continuing to learn anew, c) shifting from short-term operational strategies of variety reduction to a long term survival strategy of balance between consistent core competencies and keeping in touch with changing environments, d) integrating knowledge and experience to form organizational wisdom by providing opportunities to make nonexpert decisions/choices about organizational processes in the face of uncertainty and ambiguity.

Links between individual and organizations that guide practice have been detailed by other theorists (Argyris, 1976; Schein, 1992), reviewers of theorists (Dixon, 1992), and researchers (Inkpen & Crossan, 1995). Cowan's ideas about learning parallel those of Argyris' description of double-loop learning and are consistent with populations who attend to naturally occurring patterns of meaning and learning like those working in ambiguous cross-cultural settings. In this manner, Cowan's theory was appropriate for studying organizations in cross-cultural environments.

The second theory proposed as a theoretical framework is Tomasello et al's (1993) cultural learning theory is described an individual learning culture by imitation, instruction, and collaboration. Collaboration is a situation that consists of peers collaborating to construct something new that neither had before the interaction began. The new cognitive representation resulting from the learning includes something of the perspective of the interactional partner, a perspective that continues to guide the learner even after the original learning experience is over.

In change theory unfreezing, moving, and refreezing may be facilitated by learning through the reduction of barriers that Lewin describes as negative forces triggered by new or discomforting information. Like the loss of equilibrium described as the first step in cultural learning (Taylor, 1994; 1997), Lewin likens the loss of equilibrium to diagnosis. Moving, the next stage in change, means changing attitudes, values, and beliefs. Refreezing means reaching a new status quo through some support mechanism. While learning facilitates change, not all learning produces change. Both Lewin and Cowan suggest returning to earlier levels of diagnosis or loss of equilibrium, not because of forgetting but to be open and continually receptive to the next move in attitudes, values, and beliefs (Cowan, 1995; Lewin, 1946).

While competing theories support and explain change, learning theories are suggested here because they might be used to guide the practice of facilitating change. In this manner organizational and individual learning theories were chosen for possible use by HRD practitioners. The following questions were unanswered in research.

## **Research Questions**

How do individuals learn cultures that are not their own? How does actual versus expected career path influence members of the internationalizing organization? How do internationalizing organizations use the learning of their members for competitive advantage? What factors align all elements of the organization with its international environment?

## **Methodology and/or Research Design w/ Limitations**

Qualitative study of an organization outside the U.S. was chosen due to a gap in the literature for this type study (Adler & Boyacigiller, 1996; Mendenhall et al., 1993). Despite the language barrier and time limit, this design helped understand the processes that lead to outcomes that survey research were not able to identify. Sampling reflected participants who had worked internationally for an average three and one half years for intensive study (Bernard, 1995). Ethnographic interviews, observation, and artifact review methods were used to gather data from English-speaking Greeks in separate pilot and case study organization. Both samples were Greek-owned manufacturing groups engaged in internationalization in October, 1999; the studied organization since 1987.



The researcher studied people in their context, attempting to make sense of processes used in internationalization and what meanings people brought to that engagement. A major strength of qualitative studies is their ability to examine processes. Ethnographic interviews with participants led to insights that revealed implicit processes, making them explicit. A model of internationalization and the role of learning processes involved in it were developed based on the following method guidelines (a) the need for context-based data, (b) the importance of reality grounded theory to the development of a discipline, (c) the interactive role of people in shaping their worlds, and (d) the interrelationships among conditions, meaning, and action (Maxwell, 1998). In this manner, using the data collected, I examined untested theory, posing useful propositions for further testing.

Grounded theory methods were used to analyze study data. All interviews were conducted by the researcher and transcribed in English (Spradley, 1979). Pilot study provided a needed conceptual context for the researcher, both about Greeks working internationally and Greek internationalizing manufacturing organizations. Nine interviews were conducted with English-speaking Greek members of a Greek-owned manufacturing organization headquartered in Marousi, north of Athens, Greece and at a manufacturing plant on the National Lamia Hwy outside Athens. Four additional informational interviews were conducted where present and future growth strategies through acquisition and merger were reported along with leadership development strategies.

The organization studied was a Greek-owned paper manufacturing organization headquartered in the Pefkakia area of Athens, Greece. The domestic operation was established in 1980 in the Thrace region of northern Greece and continued as the organization began internationalizing in 1987 in Egypt, adding two plants in Hungary in 1994 and one in Bulgaria by 1997. The original founder-leader remained the President and owner in late 1999 at the time of the study.

Cairo, Egypt was a greenfield, start-up operation, the first tissue manufacturer in Egypt. Plants located in Hungary and Bulgaria were acquisitions made at the end of government controlled enterprise regionally. Despite a historically agrarian economy with 25% of its GNP (Smith, 1999) from manufacturing, Greece's European Union status, the end of Cold War political strategy and general trend toward privatization of industry regionally were situations producing opportunities where none had existed before. With a newly active stock exchange, lowered inflation and unemployment for acceptance into the Euro monetary exchange, Greece in late 1999 offered the context of a changing environment for internationalization suggested by researchers (Alder & Boyacigiller, 1996).

Thirteen interviews were conducted over a period of five and one-half weeks in September and October of 1999. All participants were Greek and worked in the domestic operation in Greece before working in Egypt, Hungary, or Bulgaria. International work experience spanned from one to five years; each was identified by the organization before the study began. Five were educated outside Greece for postgraduate education. Participants' occupations were at the upper and middle management levels; the Human Resource Director was the only woman. Five of the 13 participants were repatriates. Three repatriates had taken their wives with them on their expatriate assignments for up to five years; at the time of the study these three were the headquarters upper management level of the organization. The average age of all 13 participants was 35.

Participant observation included establishing a rapport with the participants. This served as one of the multiple methods used to both collect and triangulate data in the study using the method of constant comparison (Strauss & Corbin, 1990). Document review was also used to both collect and triangulate data between the interview findings, detailed field notes and diary entries.

Data analysis was performed on 13 transcribed interviews according to Strauss & Corbin (1990). Member checks were conducted using transcribed interviews of the one un-taped and two telephone interviews to ensure validity of information. All interviews were printed, coded, and archived using Nud\*ist data management software.

Attention to validity was also made in this case study by providing a clear explanation of the phenomenon under study and attempting to control biases (Bickman, Rog, & Hedrick, 1998) through a framing interview conducted with me by an outside researcher. Limitations of this study were

1. Findings reflect a management perspective. Sample was upper and middle management level that could speak English and were willing to participate.
2. Ethnocentric bias of the findings. Despite the literature review that as much as possible reviewed studies conducted outside the U.S., a large pilot study conducted in Greece, and member checks throughout, the findings have been filtered through the U.S. researcher.
3. Language while not an impassable barrier prevented my gaining entrance to meetings that were held in Greek, making those secondary accounts not directly observed.
4. Time scarcity was a limiting factor giving only the snapshot of the change and the organization.

## Results and Findings

Energizing prospects, becoming international, and gaining respect were three recurring themes developed into major

categories from 22 initial codes in the data. Energizing prospects were those happenings that led to the development of internationalization, becoming international were those specific properties that pertained to internationalization, and gaining respect included outcomes or perceived results of the participants having worked internationally. Intervening conditions reported and observed were Greek culture through social relationships in individual learning processes and leadership thinking in organizational learning processes.

Participants reported learning incidentally (Cseh, Watkins, & Marsick, 1999) as part of becoming the Greek International Man (term inferred from data, not used by participants). They described first trying to understand the "mentality" of the cultural other, then often instructing other Greeks who came later to work or tour about the other culture. This was described as "the nature of the job". Collaboration was often reported as problem solving which happened daily in cross-cultural work "to get the job done"; solutions were not Greek or representative of the other culture but could only be achieved using the "language of the job". This learning process was facilitated by the organizational use of translators initially and the presence of language training, while not always convenient logistically and was expected to be obtained after hours, part of an incidental learning process.

Greek teams were sent in to "maintain Greek levels of efficiency" e.g. improve profitability, in some cases teach the principles of private enterprise with regard to sales, finance, marketing, and in others teach improved manufacturing technical knowledge. These ambiguous cultural contexts found participants relying on building social relationships with the other culture; socializing with others is an integral part of Greek culture and was reported by participants as relied on to facilitate learning. Individual Greeks, without others in the field, found this more difficult and caused more trips home for some (no location was more than about an hour flight away) or the need to communicate more with headquarters. Organizational culture was a constraining condition as expertise was valued among leadership, modeled after the founder-leader; upper level managers described themselves as "instructors" and "telling others". Greek cultural beliefs of closure were found in leadership thinking where those in authority were perceived as experts who could solve problems.

Greek organizational members reported a belief in the experience of organizational leaders as a competitive advantage. Collaboration between headquarters and plant level management was replaced by "telling" behavior from headquarters to plant. There was no participation or collective use of the learning processes or their outcomes reported. More participants than not were energized by the prospect of "learning more, faster" in cross-cultural contexts than at headquarters. An organizational culture of expertise aligned this organization with the environment.

Individual career development was intrinsically motivated in an organizational context where career path and performance review was implied, not explicit. Organizational career path was determined by a benevolent, experienced Founder-Leader. Job descriptions existed but were "not paid attention to". Infrequent firings were due to an inability to adapt. While some family members were in upper and middle management positions, not all were as is the case in many Greek-owned organizations. HR Director's tenure was four years and replaced a payroll clerk position.

Boundary spanners were reported as invaluable in day to day operations, often acting as mentors for onsite Greeks from headquarters. Dixon's (1992) label of boundary spanners was used in the study to describe those Greeks or host nationals who could speak both languages (Greek and the one needed at the time). For example, Greek participants utilizing Egyptians in sales and factory positions where no tissue manufacturing existed reported a Greek employee who spoke and had lived in Arabic countries as instrumental in creating a sales force; also in this setting was the use of an Egyptian who was a mediator between Greek managers and Egyptian factory floor employees. Boundary spanners are among the outcomes of cultural learning.

## Conclusions and Recommendations

Organizational culture required not only the incidental learning of other cultures but also development of a Greek International Man identity. Embodied by the Greek founder-leader in this organization the identity was devised to get along in the organization. Components of this identity included a) college education, cultural learning experience b) multilingual (avg. was three), c) willingness to travel, sustaining a variety of time periods away from home, d) willingness to learn and change in an organizational context that is slower to do so, but will provide individuals the opportunity, e) become a cultural evaluator, modifying your own cultural attributes, adopting those of other cultures that you find useful, f) maintain a level of efficiency that is close to that of the home culture, g) form relationships with the cultural other, h) occupation, i) gender, j) maintains individual career path in an organization where the path is not explicit.

Since culturally influenced learning and the leadership consequences it creates are the context of international work, information about, experience with, and participation in cross-cultural collaboration for organizational outcomes are suggested as important elements of internationalization. However, the added elements of the Greek

International Man yield a storyline about internationalization that is inclusive of reality, more than learning alone. While in need of further study, this begins a dialogue about the HRD perspective of internationalization change; adding to research about strategy, and structural changes, this suggests the profile of individuals who could believe and value change as well as the processes that facilitate change.

Support in the data of Tomasello et al. (1993) individual cultural learning theory suggests that this theory comes closest to the thinking parts of what happens in the process. Taylor (1994) described a behavioral view of cultural learning including triggers and outcomes but in later study (Taylor, 1997) he describes gaps that were cognitive, affective, and unconscious. In need of further testing, Tomasello et al. (1993) and this supporting data suggest a cognitive level of the process that might be facilitated by HRD practitioners that brings about change in individuals to "get the job done" internationally.

Greek culture is a barrier to organizational collaboration, Cowan's (1995) level of organizational learning needed for transformative change. Herzfeld (1986) supports the evidence of closure in Greek culture; he writes that those who ask for cures in a curer relationships are often seen as weaker, that the state of needing help is undesirable. In a culture where expertise was valued and closure as a cure for problems was the norm, organizational collaboration was not found.

Culturally influenced leadership affected individuals in the organization while individuals were only beginning to move in the direction of influencing the leadership; this finding suggests some evidence of the need for collaboration beginning. This finding supports the work of others who suggest that individuals influence organizational processes (Briody et al. 1995; Economist Intelligence Unit, 1991; Eisenhart, 1995; Guzzo et al, 1994). The common element of both individual and organizational learning was theoretically proposed as collaboration, however, organizational collaboration was not found. This is supportive of the practitioner work of Argyris (2000) who writes that transformative learning is often resisted in organizations. HRD practitioners might focus on the participative, collective elements of collaboration, nonexpert thinking suggested by Cowan and Argyris. More research is needed to identify how culture might be used to the advantage of HRD professionals; for example, Greek use of social relationships and concern for a common social outcome might be useful to begin intervening with a more participatory approach to leading.

Serving as an integral context for the internationalizing individual, the internationalizing organization was found to be reflective of the national culture in which it operates. The findings of this study are exploratory regarding a shift in perspective in international HR from a preparation point of view to a benefit point of view as suggested by Inkson, Arthur, Pringle, & Barry (1997) and in need of more research in other contexts. HRD professionals could begin informal dialogue about the use of the learning processes of experienced individuals with collaborative ability and their possible participation in collective decision making thereby initiating a nonexpert, point of view through modeling.

Transformative elements, implied in all learning organization theories, suggest a fundamental change in the way individuals relate in organizations, from a control orientation to an organization that values collaboration and collective decision making. Transformative learning a type of revolution in the thinking of organizational members is based on systems theory ideology that the whole is more than the sum of its parts. Development rather than control suggests that all organization participants are interested in achieving goals as well as long-term sustainability of organizations.

### **How this Research Contributes to New Knowledge in HRD**

Culture of the headquarters organizational leadership must be considered as well as the proposed unfamiliar cultures. Data suggests that the culture of the ownership organization impact on the learning process is a powerful determining factor in how internationalization will be reconciled in the workplace. While it is not new that people come to the workplace with beliefs and expectations met by leadership and processes, all of which are influenced by the culture of the organization's leaders, this data suggests that culture influences learning processes that then influences all of the above. Issues HRD professionals in internationalizing contexts need to be aware of are (a) knowledge of both your own culture and the other culture is part of becoming international, (b) individual career expectations and leadership ability to collaborate can be culturally influenced, and (c) internationalization includes more than learning..

It increased explicit knowledge about how both individuals and organizations learn to be international through the use of theory, prior research gaps, and the data gathered in this study. An added value of the study is in the study of a sample outside the U.S., Greece in particular. There were few studies of Greeks, none about international HR in Greece, and only one study using a Greek manufacturing context.

This information begins to help HRD professionals discern what is important and what is not in

internationalizing in order to help individuals develop and organizations strategize. With regard to the cadre of people who are developed as a result of international work, this research is exploratory possibly termed a proposed theory in use (Argyris, 1976). To the degree that community and familial expectations are continually important in organizations, culture affects learning.

Phenomena like the Greek International Man and the "curer" were found along with transitions in learning reported in break away thinking of some participants signal the beginning of a transition in learning. The Human Resource Director was making changes incrementally through an informal, familial relationship with the Founder-Leader. Data compared to the models of individual learning and organizational learning resulted in models for use by HRD practitioners that come close to reality. Explored were untested theories. It added to the research on elements of cultural learning found in Taylor (1994; 1997). Finally, it entered the dialogue of HRD theory development to guide practice in internationalization in the workplace.

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