New Learning '05: What new learning emerged from the 2005 AHRD conference and how did it happen?

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This paper describes research conducted at the 2005 AHRD research conference. A qualitative case study is developed with the purpose of capturing new learning that occurs within the conference and how new learning is created. In support of the research, a three-pronged conceptual framework including communities of practice and learning organizations, new knowledge creation, and theory-building is described. It includes descriptions of data collection and how data will be analyzed and presented.

Keywords: Learning, Researching Human Resource Development, Change

Problem Statement

Graham & Kormanik (2004) recently admonished the Academy's international research conferences for failing to enhance dialogue and sharing of learning. "Each year it seems that the communication that takes place falls short of potential due to rote conference sessions listening to one-way dissemination of information…leaving only minutes to identify implications for theory, research and practice… with…no opportunity for substantive and meaningful interaction…or meaningful social dialogue" (p. 391-392). We are convinced learning and opportunities for social dialogue around learning exist at the annual research conferences. The problem is that we do not fully understand outcomes of new learning or processes through which such learning occurs.

To address this problem and to insure that the international research conference is (a) supporting the mission of AHRD by "advancing research", and (b) insuring that innovation and creativity in HRD-related research is captured, formative collection of data and a post conference session on "What New Learning emerged from AHRD 05" are proposed. The '05 activities should be the first of an annual new learning process for AHRD.

If we choose to ignore this opportunity to focus our energies on figuring out how to create and capture new knowledge we will be unable as a discipline to stay abreast of current impetus on knowledge creation and learning management in business and industry. If we are so disposed, we seriously question, "to whom we are speaking with our research?" Because of the value of new knowledge to our current context (Nonaka, Toyama, & Konno, 2000), we must generate new knowledge at an accelerated rate and embrace or create potential ways to speed that process. The affects of doing so will be felt by individuals, organizations, and the field of HRD.

Research Question and Purpose

The research question that drives this study is *What new learning is created at the annual conference and how does it happen?* The overall purpose of the study is to capture and analyze new learning that emerged from each conference session, including "best practices" and "innovation" within each Pre-conference, Town Forum, Keynote Presentation, FnT Session, Innovative Session and Symposium, and to investigate how new learning occurred within the conference.

New Learning is defined as learning that provides new insight, a diverse theoretical point of view, or a unique or uncommon conceptual framework; challenges the *status quo;* or points out the cumulative learning within a topic or research thread that has not been previously identified in HRD related research. It extends tacit knowledge, becoming explicit and known to others.

Conceptual Framework

This framework comprises a new structure constructed on foundations of three concepts: learning communities and communities of practice, new knowledge creation, and theory building. We seek to build a strong platform that will

lead to next layers we will all engage in building. As we developed these concepts for the present study, we began the process of synthesizing; sensing commonalities and interrelationships between embedded ideas within each of the three concepts. For example, we saw an emerging relationship between learning organizations, communities of practice and Nonaka, Toyma, & Konno's (2000) concept of *ba* which is embedded within new knowledge creation described below. What this means to us, at least to this point in time, is that learning communities typically have shared meaning and knowledge while communities of practice use knowledge as common ground to enhance practice. The idea of *ba* takes these concepts one step further. It implies that new knowledge is created from the structures and interactions of actors and that this new learning transcends organizations, space and time (Nonaka & Toyama, 2003).

Learning Organizations and Communities of Practice

In response to changes in society and work-related systems, the concept of the learning organization has emerged. It emphasizes five aspects described in Table 1, forming the conceptual domain of the learning organization.

Table 1. Learning Organization Aspects and Descriptions

Learning organization aspect	**Description**
Continuous learning	A focus more on learning than performance. Learning occurs at the individual, process, team, organizational, and systems levels. Learning is shared among several levels "in ways that enable the larger system to learn" (Marsick, Bitterman & Van der Veen, 2000, p. 13). Critical reflection is encouraged.
Knowledge creation and sharing	Through dialogue, shared mental models, collaborative double-loop and duetero-loop learning (Argyris & Schön, 1978) critically identifies assumptions (deuetero loop learning causes an awareness of how single and double-loop learning occur. New knowledge is disseminated and shared among people who need the learning.
Systems thinking & mental models	People share mental models and think in systems terms to see linkages, interconnections, interrelationships and feedback loops.
Participation and accountability for learning	Participation and accountability for learning is encouraged at all levels of the system.
Learning culture	An organizational culture that is flexible, enables open communication, encourages risk taking, minimizes bureaucracy and measures and rewards desired learning and progress toward development of a learning organization. The culture supports learning as a part of work.

Watkins & Marsick (1996) identify seven characteristics of learning organizations: continuous learning, inquiry and dialogue, team learning, empowerment, embedded system, system connection, and strategic leadership. Örtenblad (2004) identifies four perspectives of learning organizations as old organizational learning perspective, learning climate perspective, learning at work perspective, and learning structure perspective. A review of above definitions and perspectives of learning organizations make clear three pertinent points. First, learning organizations are organizationally and work-system bound. Second, sharing, participating and collaboration are critical, and third, culture is explicit and defined by *bona fide* organizational boundaries.

As part of a three-legged conceptual framework for the present study, learning organizations offers several advantages. First, it captures a primary mission of the Academy in providing opportunity for dialogue and sharing of 'mental models'. Next, it enhances the learning paradigm of HRD. Finally, learning organization mirrors a goal of the Academy to support learning as a part of its processes and outcomes. While learning organizations offers much in terms of a conceptual framework it has limitations.

Through Sociocultural approaches to explaining how learning is created and shared among people, it is increasingly clear that models that propose that learning is situated in social, economic and political contexts and that learning knows no organizational boundaries are becoming more utilitarian. The lines between learning in organizations and learning in other contexts are blurring to the extent that the concept of learning organizations may be passé, subject to criticism and suggestive of historical change. Marsick, Bitterman & Van der Veen (2000) in *From the learning organization to learning communities: toward a learning society* implied a transformation from

learning organizations to communities of practice. We agree that while the concept of the learning organization is still important and relevant in work-related systems we also believe that it is evolving into the concept of communities of practice. Thus, as part of the conceptual framework for the present research we do not separate learning organizations from communities of practice, but we do see an evolutionary relationship between learning organizations, communities of practice and the concept of *ba* (Nonaka, Toyama, & Konno, 2000).

Communities of practice is defined as groups of people bound together by shared expertise and passion for a joint enterprise (Wenger & Snyder, 2000) or "a group of people who share a concern or a passion for something they do and who interact regularly to learn how to do it better" (Wenger, 2004). It is a valid concept for the present study since the Academy conference is an excellent example of each of the definitions' primary components of a bounded population, shared expertise and regular interaction to learn. However, we reiterate that the concepts of learning organizations, communities of practice and *ba* are related on an evolutionary basis, that learning organizations are bound by organizational boundaries, communities of practice by practice, while *ba* creates new learning that is unbounded by time and space.

New Knowledge Creation

According to Von Krogh, Ichijo, and Nonaka (2000), new knowledge creation involves five steps: sharing tacit knowledge, creating concepts, justifying concepts, building a prototype, and cross-leveling knowledge." Nonaka and Toyama (2003) refer to SECI as a delineation of these steps: socialization, externalization, combination, and internalization. Of critical importance is making tacit knowing explicit, based in the work of Polanyi (1973). Nonaka and Toyama affirm the value of new knowledge for achieving organizational goals and competing in a knowledge-driven context. Both new knowledge and new ways of *creating* knowledge are needed in our work and societal contexts (Nonaka & Toyama, 2003). New Learning '05 proposes a strategy for creating knowledge. In doing so, we view new knowledge creation through three actions: reframing, embracing, and embodying

Reframing refers to understanding and structuring our view of knowledge and the goal of professional conferences differently. Conferences are traditionally places where knowledge is *shared*. Reframed, conferences become places where knowledge is *created*. Nonaka and Toyama (2003) point out how this perspective differs from communities of practice where knowledge is embedded and serves as a resource to draw on. Participants become more than knowledge receivers or carriers (Poell & Van der Kroght, (2003). They are now actors, employing strategies for creating and acting on new knowledge. Contradictions in our viewpoints become opportunities, rather than obstacles. We come to see them as necessary in the process of arriving at a new viewpoint (Nonaka & Toyama, 2003). Reframing also involves questioning meta-narratives that bind our knowledge creation (Lyotard, 1993). Accepted purpose and structure of professional conferences is one such meta-narrative. Additionally, acceptable sources of new knowledge and approved participants in this process are two ways knowledge has been controlled that are in conflict with postmodern perspectives (Lyotard, 1993).

Embracing flows out of the reframing process. New sources and new strategies must be embraced and employed in creation of new knowledge. Action becomes an important source of knowing that leads to new knowledge, making the voices of practitioners critically important (Tennant, 2000). Voices of marginalized groups are valued in concert with those of the hegemony (Lyotard, 1993; Bierema & Cseh, 2003). Contexts take on new importance when the situated nature of knowledge is embraced. Reality is viewed from different angles, based in different contexts (Nonaka & Toyoma, 2003). Connected thinking and constructed knowing (Belenky, Clinchy, Goldberger and Tarule, 1986), operate alongside traditional oppositional patterns of relating.

Embracing varied viewpoints requires a new understanding of dialectical thinking, which focuses on change. "Knowledge creation is conceptualized as a dialectical process, in which various contradictions are synthesized through dynamic interactions among individuals, the organization, and the environment (Nonaka & Toyoma, 2003, p. 7). In dialogical reasoning we try to understand and be understood by others. Balancing believing and doubting, trying other thinking on for size (Elbow, 1973). In our research culture, we major in doubting. This suggested dialectic involves balancing of opposites; including, rather than excluding and expanding, rather than contracting. Lyotard's (1993) postmodern critique reminds us that parallel realities exist and not all new knowledge must be synthesized and generally validated. For Nonaka & Toyoma, (2003, p. 7), "synthesis is not compromise. Rather it is the integration of opposing aspects through a dynamic process of dialogue and practice," establishing the relationship between and the reality of both a yin and yang. That is the dynamic process we are trying to create. Constructing involves planning for new knowledge creation through creating and employing new strategies and structures, embodying processes in action with others. Intentionality is implied as we create new and developmental ways of talking with one another (Wiessner & Mezirow, 2000), merging dialogue and practice.

Nonaka & Toyoma, (2003, p. 7) suggest the construct of *ba*. "*Ba*", which is conceptualized as a shared context in motion, can transcend time, space, and organization boundaries to create knowledge." It is context specific, as "knowledge cannot be created in vacuum, and needs a place where information is given meaning through interpretation to become knowledge." The conference is that space.

"A shared context in motion, in which knowledge is shared, created, and utilized. Ba provides energy, quality, and pace to perform the individual knowledge conversations and to move along the knowledge spiral." (Nonaka & Toyoma, 2003, p. 7). Ba essentially becomes our next evolutionary point in learning organizations – communities of practice – the new actor (Poell & Van der Kroght, 2003) can move from one group to another and create new groups as a free agent, creating groups with in the organization and beyond the organization to make a space where they can create the new knowledge that is needed in their dynamic environment. Ba employs SECI, the new knowledge creation process identified by Nonaka, Toyoma, & Konno (2000).

In the Academy, we bring knowledge to the conference, making explicit and sharing what we have moved from tacit to explicit. But, we don't take the next step identified by Nonaka, Toyoma, & Konno (2000), e.g., combination. We identify this as the missing step in professional conferences. This combination is what we consider the new learning that can be created and then evidenced in new action in our individual contexts. Internalized, taken into one's tacit process, new learning then moves to the next spiral of new knowledge creation.

An example of this process of knowledge creation that results in new learning is embedded in this current project. Organizers of the International Conference on Transformative Learning (sponsored by Teacher's College, Columbia University, NYC) sought to assess the status of the theory of transformative learning and change it in response to critiques leveled against it and findings of new research informing the theory. Scholars and practitioners came together in collaborative inquiry, designing conference as concurrent research events (Wiessner & Mezirow, 2000; Wiessner, 2004). Their process, and new learning created from it, resulted in new action and sharing of that learning by people who benefited, starting a new spiral of learning when it was shared and discussed within overlapping participants in that learning project and AHRD, resulting in this research project. In this conference we begin from that knowledge that has been made explicit, but also move to combine it in new ways in this new context to create new learning that will result in new internalization and serve as a catalyst for multiple new spirals by conference participants and members of the academy.

Theory-building

HRD has been criticized for lacking multi-paradigm theory building approaches to research. The most important task is to identify the right research method for the research problem at hand (Weick, 1995). "It is therefore less important that we support one specific theory-building research method over another than that we view applied theory-building research as a necessary and helpful form of scholarly inquiry" (p. 224).

To allow for both types of research questions, different paradigmatic lenses will enable the "most informed understanding of the phenomenon" (Lynham, 2002, p. 231). We agree with these scholars and substantiate our agreement by referring to the three-pronged conceptual framework described herein.

Lynham's General Model (2002) features five interactive interdependent and interactive phases, thereby moving beyond the linearity of Van de Ven's Professional Science Diamond Model (Storberg-Walker, 2004) in a way that is conducive to this research project. Conceptual development and operationalization are phases well represented and documented in the transformative learning conferences (Wiessner, 2004). *Learning '05* has potential to contribute to further development of the confirmation or disconfirmation and application phases in conference settings. Both projects focus on continuous refinement and development. Flow between inductive and deductive processes enable movement from theorizing to practice as well as practice to theorizing (Lynham, 2002). "The General Method provides a *framework* on which theorists can hang appropriate theory building method(s)" (Storberg-Walker, 2004) and we employ it in that way.

We chose not to expand on or fully develop theory-building as a conceptual framework component as much as we did learning organization, communities of practice and new learning creation simply because we believe the present study is likely to be less supported by theory-building within this case study as it may be in future action research studies. As this new learning research progresses beyond the 2005 conference we anticipate theory-building to further emerge at another level of analysis, although it is not totally out of the question that we may identify some limited theory-building being supported in the present study.

Research Design

Qualitative case study design was chosen for this study because it will "investigate a contemporary phenomenon within its real life context". We "deliberately wanted to cover contextual conditions…because they might be highly pertinent to the phenomenon of study" (Yin, 1994, p. 13), i.e., the conference. We seek to understand cultural systems of action (Feagin, Orum, & Sjoberg, 1991). Cultural systems of action are interrelated activities engaged in by actors in a social situation. The views and actions of "actors" in this case are critical to understanding how new learning is created and the extent to which the conceptual framework was supported.

This case study satisfies the three requirements of qualitative methods: describing, understanding, and explaining. The type of case in the present study is *explanatory*. We chose an exploratory case because of the casual nature of the phenomenon under investigation and our analysis will use pattern-matching techniques. The boundaries set by the conference setting will maximize what can be learned, in the period of time available for the study. Additionally, the conference setting will allow us to consider not just voice and behaviors of actors, but also of relevant groups of actors and potential interaction between them. This aspect is a salient point in characteristics that case studies possess; giving voice to the powerless and voiceless. The unit of analysis in the present study is the 2005 AHRD conference. We also hope to identify outcomes through rival theories.

Yin (1994) identified five components of *research design* that are important for case studies: research questions, unit(s) of analysis, logic linking the data to the questions, and criteria for interpreting findings (Yin, 1994, p. 20). In the present study pattern-matching techniques will be used to link data to the research question and the conceptual frameworks.

Stake (1995) and Yin (1994) identified six sources of evidence in case studies: documents, archival records, interviews, direct observation, participant-observation, and physical artifacts. We will collect data from several sources based on purposive criteria. For example, we will use a survey and data collection sheet throughout the conference to collect written data from a variety of respondents including presenters, attendees, and symposia chairs. We will also be doing in-depth, structured, focused and informal interviewing. One approach is a purposive sample of some twelve attendees over the duration of the conference based on criteria to be established and agreed upon by the research team and approved by the institutional review board. Criterion is likely to include but not be limited to expertise in HRD scholarship, work experiences, and experience with HRD and related research conferences.

Written data will be collected during each 'formal' event, i.e., Pre-conference Workshops, Town Forums, Keynote Presentations, Food n' Thought Sessions, Innovative Sessions, and Symposia. We have also developed a protocol for collecting written data on learning that takes place in "informal" discussions, dialogues, and interactions that occur throughout the conference between sessions, over breaks, during meals and in the course of free-time. We will also randomly choose exit interviews at the end of the conference to query expectations prior to the event, the extent those expectations were met and what and how new learning occurred for the interviewee. All face to face interviews will be audio taped. We also anticipate establishing several focus groups on Sunday to begin to identify 'next steps' in terms of how the new learning captured and the ways in which the new learning occurred can be transferred. Focus group data will be audio taped. Finally, each researcher will be doing direct observations, and some researchers will be participant-observers. All researchers will be taking field notes.

Although prolonged engagement in a strict sense is not possible with this study (the conference is four days total including pre-conferences), issues of trustworthiness within our control such as persistent engagement, member checks, peer debriefing, and triangulation of data (Strauss & Corbin, 1990) will be carried out. We will also look for indications of evidentiary inadequacy through our daily analyses and in our summative analyses. We will examine for inadequate amounts of evidence, inadequate variety of different kinds of evidence, faulty interpretative status of evidence (inadequate audit trails), and inadequate disconfirming evidence.

Yin (1994) suggested that case study investigators must be able to operate as a senior investigator during the course of data collection and that there should be training beginnings with the problem and the development of the case study design. All researchers will attend a training session at the beginning of the conference. The training will cover background and justification for the research, the conceptual framework, the type of evidence being sought, and variations that might be expected.

Data Analysis

Miles and Huberman (1984) suggested several analytic techniques such as rearranging the arrays, placing the evidence in a matrix of categories, creating flowcharts or data displays, tabulating the frequency of different events, using means, variances and cross tabulations to examine the relationships between variables, and other such

techniques to facilitate analysis., In the present study we propose to use a variety of techniques to analyze and display the data.

Our analytic strategy is to use the case description as a framework for organizing the case study and the original objective of the case study (capture new learning and identify how new learning occurs) to help identify some causal links that will be analyzed (Yin, 1994).

Yin (1994) suggested four principles to ensure analytic quality: Show that the analysis relied on all the relevant evidence, include all major rival interpretations in the analysis, address the most significant aspect of the case study, and use the researcher's prior, expert knowledge to further the analysis. We plan to use categorical aggregation and pattern-matching as suggested by Stake (1995) and Yin (1994) respectively. We will also code the data to help identify the issues more clearly at the analysis stage (Stake, 1995). In accordance with Eisner and Peshkin (1990) we will use direct interpretation of events and constant comparative techniques (Lincoln & Guba, 1985; Glaser & Strauss, 1967).

Limitations

While limitations to case study research are typically unstated, we feel it is important for the reader to understand that the present study is using the 2005 AHRD conference as a single case, thus no generalization is possible and even transferability is limited only to similar contexts. This first study is a case of the event boundary, i.e., the 2005 conference. Case study was the most suitable method for this initial research. However, it is our intention for this research to be continuous. To accomplish this we suggest that the next 'phase' of the research embrace an action research approach.

Results and Findings

Data and results will be shared in a number of venues. First, preliminary information/themes from our analyses of what new learning emerged and how it was created during the conference will be shared within the conference (case study) at the Sunday workshop. This will afford us an additional opportunity to capture new learning and identify how it happens. To accomplish this goal, Sunday's participants will be asked to respond to the themes that emerged from the analyses and to actively engage in creating new learning from this preliminary report.

Data from the preliminary report will be included in further analyses of un-analyzed data post-conference. A final report outlining the research process, conceptual framework and results is anticipated within 2-4 months of the conference. The summary report will become part of the next year's conference and the process will be evaluated, revised as needed and repeated. The research summary and conclusions will be published in the *HRDQ* Forum and/or other AHRD publications. Finally, the research team will submit the research to peer-reviewed journals in HRD, adult education and related disciplines in consideration of publication.

Conclusions and Recommendations

The conclusion and recommendations will be identified collaboratively in a Sunday morning post-conference session. Participants will hear a report of themes that emerged from analysis. They will then prioritize four to five themes using a multi-voting technique. Next participants will work in self-selected small groups on one identified and affirmed theme. Dialogical reasoning in the small groups will lead to conclusions and recommendations related to that theme. Reports to the larger group provide an opportunity for further expansion, clarification, and application. These collaboratively formulated conclusions and recommendations will be disseminated as described under Results and Findings above. We recommend that AHRD finds a way of both responding to that collective report and of embedding an on-going cycle that focuses on new learning, that is based on this research and that is owned by the organization.

How this research contributes to new knowledge in HRD

New learning, unlike new knowledge implies action and application of the learning to practice or scholarship. Understanding what new learning is occurring within the AHRD 2005 annual research conference is a baseline by which we can establish foci and learning themes that subsequent conferences should address. Additionally, identifying how new learning is happening within the conference offers us the ability to begin to isolate formal and informal activities, tacit and known environments and structures, social interactions and other criteria where new learning may have a propensity to be created and thus replicated. This research provides an opportunity for

determining *what is* – what new learning took place at the 2005 AHRD Conference – for exploring what we can do, or how we can apply, that new learning in the field of HRD, *and* for questioning what *should be* – areas within our discipline that require our focus.

For the discipline of HRD this study provides unique understandings of how conceptual frameworks interact with data and the extent such interactions are valid within a professional social context. Results may also contribute to stimulate further HRD-related research using large groups and how new learning is created. The knowledge gained from this research has the potential to change how we view professional research conferences and may impact the literature in professional development and add value to research within large group learning models. Results may also give HRD a leadership role in knowledge creation and dissemination.

Finally, and of most importance, we have the opportunity through this and subsequent research to engage in transformative learning. New learning and knowledge is shared by individual attendees who in turn take the new knowledge and apply it and make it implicit in varying other contexts. Actors within the new contexts then internalize this new knowledge and have the potential to be transformed themselves. They can then make new knowledge explicit and the cycle continues. To the extent this occurs throughout the discipline, there may be potential for HRD as a whole to be transformed in terms of how we view how we learn and the role of new learning within professional and occupational development. Without it, we fear we will be marginalized by business and industry that will partner with only those disciplines that understand knowledge creation and how new learning is developed.

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