



A critique of practice in contemporary learning and development

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So began...one of the biggest adventures of my life, canvassing the swirly terrains inside my own head for signs of life...I worked hard, dedicatedly, and I began to learn things. I began to map a previously unknown internal world. A world that, when it showed its weight and mass, its ability to hide in plain sight, and its sway over my behaviour, stunned me.

(Bruce Springsteen, *Born to Run*)

Disclaimer: The views expressed in this document are mine and are not necessarily the views of my supervisory team, examiners or Middlesex University.

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shepherding of transdisciplinary studies into the traditional subject disciplines of the university is a powerful and unifying force for rethinking and new learning. I was glad to be a small part of that.

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A critique of practice in contemporary learning and development

Abstract

This critical commentary has a dual purpose. It is, at once, a reflection on four public works which track the arc of my activity and growth as a professional over the last ten years, and a contextual examination of what those works, and the narrative trajectory they trace, indicate to us about the wider context of learning and development (L&D) inside organisations.

The work involves an analysis of the wider intellectual arena from the last 50 years – how and why many of the underlying assumptions around learning and development emerged. It explores the gaps that exist between current practices and assumptions in corporate learning and development, and the wider challenges for organisational development, structure, and learning.

The commentary is, therefore, a two-way narrative. It tracks my own intellectual development as a step-by-step broadening of perspective, together with an account of the spiral of exploration, and discovery leading to insight, that is embedded but undisclosed in the public works themselves.

A framework is constructed of five different lenses, and these lenses are used to examine the intermeshing processes involved both in the works themselves and the unlocking of meaning that emerges from the examination of the relationships between the works.

The public works in question are my three most recent books – *The Learning Challenge* (2014); *Building Leadership Development Programmes* (2017); and my book on learning culture, *Workplace Learning* (2019)(2021) – together with my role in the Penn Chief Learning Officer (CLO) executive doctoral programme. This fourth public work traces my involvement with the University of Pennsylvania’s programme for Chief Learning Officers and other learning leaders, which I helped construct in 2006 and have been working on and teaching in ever since.

The Public Works

1. PennCLO executive doctoral programme: (2007-present)
<https://www.gse.upenn.edu/academics/programs/penn-chief-learning-officer-edd>
 2. Nigel Paine (2014) *The Learning Challenge: Dealing with technology, innovation and change in learning and development*, London, Kogan Page
 3. Nigel Paine (2017) *Building Leadership Development Programmes: Zero-cost to high-investment programmes that work*, London, Kogan Page
 4. Nigel Paine (2019) (2021) *Workplace Learning: How to build a culture of continuous employee development*, London, Kogan Page
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The commentary explores the symbiotic connection between all four public works and unlocks the hidden tributaries of thought that link them, mediated by my own emerging practice. This analysis would not have been possible without the reservoirs of insight afforded by my role as both researcher and practitioner.

The conclusions will change my practice and help me develop a new agency with organisations, whilst challenging my assumptions by setting my work in a much broader intellectual frame. This research has been a process of transformation and consolidation.

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Chapter 1

Starting and finishing

It is the space between ideas where meaning can be explored. (Prof Brian Cox, 2021)

Many years ago, I ran a programme in the west of Scotland to help people acquire some of the core skills required to run community organisations. The programme included chairing skills, producing effective minutes, getting things done, running successful meetings and holding people accountable. One of the highlights was helping participants towards (usually) their first engagement with public speaking.

It was only during the reflection process enabled by this doctorate that I realised its success came not from the programme itself, but from its context and the network of influence that led to its creation and delivery. That programme generated a fundamental lesson in my practice as I reviewed what made it stand out. However, it has taken decades to extract and make explicit the complexity of that practice. Encapsulated in that small event is the genus of this dissertation: a process of realignment and discovery mediated by a series of key frames and insights generated from outside the learning and development milieu.

At its core is the complex relationship with knowing and reflecting on knowing. I had never questioned my position as a practitioner, nor explained success or failure in my practice from any other perspective than my ability as a facilitator and the commitment of my learners. I had rarely explored the concept of positionality in that process or understood the key role of reflexivity. The link between them is explained by Noh (2019), quoting Fook (1999):

reflexivity should be related to positioning as ‘an ability of locating yourself in a picture’...It provides insights into ‘how what you see is influenced by your own way of seeing, and how your very presence and act of research influences the situation in which you are researching’...Fook (1999) also argues that researchers should incorporate acknowledged influences into their research rather than minimising them. (Noh, 2019: 330)

I realised that ‘negotiating my positions between a researcher and a student and/or practitioner, and an insider and an outsider was complicated’ (Noh, 2019: 330). I did not go into a large centre of deprivation in Clydebank with a flip chart and overhead projector and put up a poster advertising the scheme to get this initiative going. No one would have shown the slightest bit of interest. Instead, I worked closely with the community development team in the area. I became a familiar face. The programme emerged out of hardcore need, and it was linked to the network of community organisations that had been set up as part of a huge initiative to mitigate some of the worst effects of social deprivation by handing over decision making and some resources to the local community.

Everything was based on a philosophy of direct action, designed to empower the community, and permit it to run its own affairs. Decisions were made as close to the local community as possible (borrowing the EU philosophy of subsidiarity). It was paid for by the European Regional Development Fund. This was designed to be a complex series of enabling programmes that were radical at the time because resources were transferred into the local community or managed locally on behalf of that community. The policy had been shaped by Strathclyde Regional Council – at the

time, one of the largest local authorities in Europe – and was part of a multi-layered campaign to improve the health of local communities by getting involved at street level and listening to what was needed, rather than imposing policy generically from outside and top down.

What I did was a small manifestation of that policy in action. The fundamental principle was to hand over power and resources to the community to help them cope with the processes around decision making and accountability. My role was overtly about community skills development, but it had a subtext: helping people aspire and believe in themselves as learners and leaders. Most had left school with no qualifications, and their low self-image remained embedded as a negative force into their adult lives. I was particularly proud, therefore, when one of my ex-students became a local councillor and powerful voice in the town, actively promoting community development. “I never thought this was for the likes of me,” he said with real pride when we met a few years after the programme handover. And many of those nascent community groups and organisations flourished for many years.

The success of the initiative was based on observation and participation. This meant that needs were contextualised and the tacit as well as explicit value system was taken into account. Although much of the content was generic, every example, case study and outcome took account of the community and paid deep respect to that community. The outcomes were, therefore, intellectual, social and emotional. The job was to strengthen the community, not teach it how to chair a meeting. The programme was a means to a bigger end, rather than an end in itself. Every component of the programme had a tangible and measurable benefit to both individuals and their community. It was as if the denotation of each core skill element had a connotation that was clear and directly applicable outside their environment.

What worked was the fact that the simple course was part of a complex intermeshing of external ideas and local insight. My work in that community made me both an insider and an outsider: someone from outside who came in as a so-called expert, but also someone from inside who was trusted. My initial role was to listen and understand, participate as an outsider and show, over time, that I understood what was needed over and above the delivery of useful content. I had to be trusted to the point where it was possible for participants to be vulnerable in front of me.

I realise now that curriculum and syllabus were not the points of departure at all. The bluff, bravado and masking on both sides had to stop to make any profound difference. This was complex and socially contextualised knowing, and a direct link between knowing, doing and being. I also realise now that those experiences had a profound effect on my practice as they had been tacitly absorbed. The net effect was to push me to the outer fringes of learning and development where I have always remained as a contrarian voice, trying to focus on the bigger picture – not polishing the stones on the beach, but trying to take in the landscape.

It is clear this learning was never designed to focus solely on individuals but was a significant part of community knowing. It worked only in the collective recognition of community ownership together with a sense of empowerment that was made significant because that group had a collective purpose. The programme took place in their space. It was for them and co-created with them. It was a community rather than an individual experience.

The situatedness of knowing was contextual. I was part of that context but my presence there altered the context. The space and the strength of the connections between those intelligent nodes was of critical importance. This was embodied in the learning of the whole community, rather than in individual expertise. What the community knew and could do, far exceeded any individual

competence but was conditioned and enabled by that expertise. I had stumbled on organisational learning; it was right in front of my eyes.

I saw different levels of knowing without acknowledging those differences. This was clarified for me by the work Heron and Reason did in the 1990s in their articulation of four forms of knowing:

these four forms of knowing constitute the manifold of our subjectivity, within which, it seems, we have enormous latitude both in acknowledging its components and in utilizing them in association with, or disassociation from, each other. (Heron and Reason, 1997: 280)

These four forms of knowing are: experiential knowing which is tacit and emerges from the flow; presentational knowing which gives expression to experiences; propositional knowing which is the knowledge that can be laid out and taught; and practical knowing which is manifest in purposive deeds.

Looking again at that programme in Clydebank, it is clear my locus and focus was concentrated on propositional knowing. I wrote it all down, and eventually produced a learning module for those on shift work, or with child-minding difficulties, so their irregular attendance did not mean they would fall behind.

My role was to ensure that the propositional knowing emerged as practical knowing. The participants had to absorb that abstract knowledge and own it and turn it into new behaviours and actions in the community. Yet the key to much of the insight I gained lay in exploring the other two forms of knowing.

So much of the power of the programme lay in experiential learning. It was emergent and tacit. Gaining confidence, feeling a sense of empowerment and entitlement which had not existed before, were huge outcomes that I observed, but did not connect to the overall purpose. Without experiential learning, the propositional knowing would not have made any impact or have been seen as relevant. Knowing how to chair a meeting was one thing; believing that you had an obligation and the ability to serve your community by making a local organisation function well was something completely different. The group articulated their learning by gaining new experiences as learners, as community activists and as decision makers on behalf of their community. I was involved in something more profound: this was participatory enquiry (Heron and Reason, 1997) not programme delivery.

The presentational learning emerged as the pieces fused: personal insight, political awareness, entitlement, and activism took shape in the myriad layers of the initiative. The programme I led was a small part of this, but it was entirely integrated into the flow of activities and the bigger picture of community transformation. In the sense that Nick Petrie described it (Dinwoodie et al., 2014), this was an instance of vertical development as aspirations and insights changed and participants began to think differently. It is very much a combination of outside-in activity introduced with the objective of creating space for the inside-out capabilities to grow (Dinwoodie et al., 2014).

So systemic impact occurred neither from outside nor from inside, but from a dynamic combination of both. In microcosm, my programme brought outside activity that stimulated inside capability, that led to inside activity. This was complex and symbiotic. In Krebs and Holley's terms (2006) the initiative built a transformational web of change that was 'widespread, dominant and self-sustaining' (Dinwoodie et al., 2014:10). I was operating a long way from course prospectuses and

individual development opportunities. A similar process was deeply embedded in the University of Pennsylvania CLO executive doctoral programme. In many ways what happened in Clydebank in the 1980s blossomed into something huge in the 2000s. Penn tapped into something unarticulated but profound.

What attracted me to the offer of helping to create the PennCLO executive doctoral programme was the big-picture aspiration – not to provide learning leaders with credentials, but to transform the way they thought about the world. There was no formal curriculum, but engagement in ideas clustered into blocks: leadership; technology; learning; business; and evidence.

As students worked their way through the first four blocks in an 18-month preparation for their dissertation block, which lasted a further 18 months, their ideas about the basics of learning in organisations were systematically challenged. There was, and still is, very little focus on ‘this is how you do things’ and much more on challenging ideas and assumptions and thinking deeply about practice. For many, that whole doctoral journey was transformational. Again, participants began to think differently and that emerged into changed practice and a far more influential role in transforming how organisations operated.

What I had never previously acknowledged, as I compartmentalised aspects of my working life, was that the Penn programme was not simply an engagement that required organising, teaching, and directing students through a formal learning programme, but the spine of insight that impacted everything else I did. There was a voice in my head that always asked: ‘what would your Penn colleagues think of that?’ and when I wrote the three books that form, alongside my work on the doctoral programme, my sequence of public works, I needed evidence-based credibility and a position that would stand up to academic scrutiny.

In many ways the journey through the three books over the six years was a process of almost constant writing, and reflected, more than I realised, my increasing involvement and engagement with not just the Penn content but its overall philosophy, values, and approach to knowing and practice. I had a virtual reflexivity partner, questioning my assumptions and asking me to clarify what I believed and why.

I came to realise that research is not digging for treasure but mapping the hidden terrain. Research is iterative and a learning process, rather than making a single discovery. Furthermore, my own wisdom of practice played into that overall conceptual framework and had its own kind of validity.

This critical commentary follows those conclusions and that logic. My major frames are explored in the next chapter, and it was these frames that allowed me to rediscover my own participation in the Penn programme and see the implicit pathway that I followed through the research and writing of my three books (Paine 2014; 2017; 2019/2021). After the framing chapter, I explore each of my public works in turn. Through the juxtaposition and contextualisation of my own work as a writer and practitioner, I became situated in my own intellectual history.

My final two chapters explore that contextualisation and the implications for my own practice and offer a reflection on the process that I engaged in, and what, essentially, I learned on the journey.

Chapter 2

Context: The lenses and the focus

In an increasingly complex world where discipline/domain islands cannot remain isolated, sophisticated bridges of knowledge transfer to produce new learnings, and syntheses are required which are of use to the widest number of stakeholders. (Dr Kate Maguire)

Introduction

The period during which I wrote three books about aspects of corporate learning and development represents a time of rapid intellectual growth and development. The ideas embodied in the books had been simmering inside my head for a few years beforehand. I felt an increasing personal pressure to commit to paper what I spoke about and consulted on, partly to raise my game, and partly to clarify for myself what I really understood about learning inside organisations.

This chapter will tease out the source of that knowing and relate it back to a complex intellectual scaffolding that had been built over that ten-year period. There was a continual churning of insight that was tested, challenged, and made manifest by the activities, including writing, during these years. Of great importance was my teaching at the University of Pennsylvania, my active engagement with a range of organisations, and the myriad of speeches, articles, and research that I undertook in the course of my work. That process was intense and demanding but it led to rapid intellectual growth. However, nothing was particularly surfaced, articulated or defined in the pressure of simply getting things done.

This doctoral journey involved a close analysis of, and deep dive into, the world of learning and development. From that perspective, I was able to define some of the major trends and directions

in corporate learning. I tried to maintain a broad view of the context of learning at work to avoid getting dragged down rabbit holes of fad, fashion or unevidenced claims. I avoided being seduced by the specious boasts about online learning, mobile learning and neuroscience-based (or ‘brain friendly’) learning by focusing on what I could prove was effective.

I also realised that a narrow focus on an ever-more detailed analysis of what learning and development professionals did, and could do better, would only get me so far. To engage more deeply with the milieu in which they worked, I had to grapple with two fundamentally different processes and two conceptual frameworks: individual learning, and the context for learning inside the organisation itself. The idea that organised and structured learning targeted at individuals would naturally lead directly to a more competent and effective workforce, which in turn would build a more successful organisation, was simplistic. The evidence from report after report (see for example CIPD, 2011; Paine, 2019/2021; or Mercer, 2021) indicated that the landscape was more complex, requirements more diverse, and the outcomes more nuanced.

I came to realise, by observation, that reducing learning at work to a simple input/output frame, where more input was good and led directly to increased output, could not explain the differences in individual, as well as organisational, performance; and that the relationship between those two aspects was complex. I had stepped into a maze of ambiguity and the way through it was tortuous.

Gagné taught us about the conditions of learning in the 1960s. He showed there were different kinds of learning, and different teaching approaches for each kind. He defined a learning hierarchy that stretched from a basic stimulus and response model at one extreme, to cognitive

scaffolding at the other. This was complemented by a sequence of steps that were required to take the learner from awareness to retention, and ultimately towards transfer of learning (Gagné, 1965).

I had a different journey of exploration. This took me away from a sole focus on the individual learner to a more bifurcated investigation into the conditions of learning. These conditions were defined by the culture inside organisations as well as the process of learning. I needed to know what worked, what did not work, and why. I had read Gagné in the early 1980s, at the beginning of my own learning journey, and he seemed a fitting starting point once again for a different kind of intellectual exploration.

Empirically, I came to realise that the sum of learning in an organisation is not a simple multiple of individual capability, but that the nature of the organisation itself is a specific factor that can dramatically alter the level of impact. The nature of the organisation was something significant. Acknowledging that took me beyond a simple focus on the quantum of individual learning. If learning was a solitary activity, how did it lead to whole system performance? This was, obviously, a collective achievement. Performance is far more than a rounding up of the skills and knowledge in an organisation; it is an indefinable (or so I thought) X factor that explained the difference between high levels of competence and efficiency in an organisation, and exceptional overall performance. This idea of an X factor propelled me to revisit and explore the concept of learning culture.

This chapter traces that journey of discovery back to its roots. To understand and enrich the point of knowing I had reached required a deep dive into the intellectual and epistemic context of my understanding. Some of that was easily surfaced, but some required an exploration of new areas way beyond the confines and scope of organisational learning that propelled me outside my comfort zone.

The journey outside learning and development

In my first book, *The Learning Challenge* (2014), I focused on what I knew: the myriad ways it was possible to organise learning and development inside organisations. I wrote it for an earlier version of myself – struggling to come to terms with a complex and demanding role in a large and multifaceted organisation where I was overwhelmed by choices that had to be made. Anyone in that position was forced to make decisions about where to invest. Was it induction, or leadership? What about compliance and technical competence? All were priorities for their stakeholders, so choices had to be made.

I was convinced there was an audience for a book that provided a detailed overview, together with an opportunity to see at a more granular level the kind of choices other organisations had made and why. The book attempted to illustrate what was going on in the best learning organisations inside corporates, so any reader could enrich their understanding of the domain. The book showed what, and it showed how, but it hardly touched on the biggest question of all – why!

The book argued that fresh ideas about learning, along with new technologies, provided radical opportunities for extending the reach and impact of learning. It examined, relatively uncritically, the existing model of learning, but embraced new thinking, new technologies and new methodologies to enhance and extend that model. The aim was to make that investment in corporate learning more efficient and effective by extending choice and sharing the latest ideas.

It showed, for example, how the broadest approaches to learning recognised that courses were only a small part of the totality of learning in organisations; learning from colleagues and learning from experience were far more impactful over time (Arets, Jennings and Heijnen, 2015).

In contrast, the second book (Paine, 2017) started not with a description but with a dissatisfaction. Why did so much leadership development fail? There was a large element of frustration, which I shared, about the rapidly evaporating impact of leadership development and its lack of enduring effectiveness inside organisations, despite large investments and serious commitment from the top.

The question surfaced during the writing of the first book, but needed to be answered in the second: why did so much investment in leadership development appear to be ineffective? The clear evidence seemed to indicate that, more often than not, it left little lasting impact and no permanent change (Kellerman, 2012) (Pfeffer, 2015). I began writing almost immediately after finishing *The Learning Challenge*; wanting, in one sense, to have a debate with myself and work out the answers during the course of the writing.

Looking back, this process was a necessary but critical reflection on my own work in the BBC's leadership programme. This initiative – which I had argued for, shaped, and implemented – had a budget of £35m and a target audience of 6,000 managers from Board to first level. Had it worked and made a lasting impact, or did the waters close over the project soon after I left the BBC?

The answer to that question clearly lay outside a detailed examination of the quality of the programme content that had been assembled. This had been a well-resourced and carefully assembled package of insight and experiential learning. So, therefore, I was forced to move outside the confines of content and process, to examine other factors such as the context in which leadership development was delivered and the ownership of the outcomes.

My research revealed that the culture of the organisation, and the dominant behaviours and values around leadership, would inevitably trump the best laid plans of any short-term leadership development intervention. I realised during the writing that I was on to something, and it was much bigger than leadership. The challenge shifted to attempting to work out how to build exceptional organisations that would perform brilliantly in most circumstances, as well as engage their entire workforce. Leadership was a critical part of this but not the whole story. The focus only on developing high-quality learning programmes was neither sufficient nor, really, the point.

The research during the writing process took me back to ideas that first emerged in the 1990s around organisational learning, learning culture and high-performance organisations. And to understand the conditions more fully, I found myself treading a path even further back to Robert Gagné where the journey had begun some 25 years before.

Expanding and extending this logic was the genus of the third book (Paine, 2019/2021). It began with a number nagging questions: is there such a thing as a learning culture? Can it be defined? If so, is it a force that transforms learning? Finally, how do you build and sustain it, and what difference does it make to organisational performance?

If highly competent people were powerful nodes inside an organisation, was the way those nodes connected with each other, and with other nodes inside and outside the organisation, just as important as the individuals themselves? I began to think that, just like the brain itself, the spaces between the nodes, and the density of their connections, was the important thing. Was the resilience and capability of an organisation something greater than the sum of the capability of its individual employees? These thoughts pushed me outside the learning and development mainstream and took

me on an extended intellectual journey into the broader literature of what gave complex organisations longevity and resilience, alongside their milieu, context, values, and behaviours.

I had to answer three questions: could I define learning culture as something discreet and useful as a concept? Would the idea of ‘learning culture’ stand up as an identifiable element in an organisation that was both part of, and separate from, its overall culture? Where did learning fit into that bigger conceptual framework of organisational development and organisational performance?

Once again, I became a learner trying to explore and make sense of different domains. I dived into the realms of sociology, psychology, and organisational theory. These perspectives helped me craft lenses that brought into focus my public works and generated new insight and understanding. It also forced me to connect my intense involvement over a ten-year period in the CLO doctoral programme at the University of Pennsylvania, with my own ideas and my increasing commitment to serious writing.

The critical frames of reference

Starting the research for my doctorate helped me understand the limits of my own, what Pierre Bourdieu calls, ‘habitus’ (1977). The sense of an actual journey through my three books and the important link to the CLO programme emerged as a valuable insight in my doctoral journey. And that research gave me a more complex and holistic perspective. I have been able to situate my work in a much deeper stream of knowing than I had previously considered relevant.

The process was not a one-way abstract examination of learning and development, but an opportunity to look deeply into my own assumptions, values and understanding, and therefore

critically reflect on my own practice. I had to surface the hidden process that had led to my own ontology and epistemology. This shed light not only on my own intellectual development, but also helped me to articulate a new way of understanding the complex way that learning works inside organisations. Increasingly it helped me formulate why some of the current assumptions, frameworks and simplistic models in corporate learning need to be upended.

These lenses helped me build a complex optical instrument. To see how it worked, the various elements had to be separated into their component parts to make them visible. This deconstruction was not a linear, logical journey but a series of meanderings and false starts around some important and powerful ideas. This chapter, therefore, offers a perspective and defines the ways in which I was able to see the public works in quite a new light. It was a reflexive process in that I was an inseparable element of the whole. Reflecting on that journey, I realised that I had always extracted myself from the story and therefore missed the connections and the links.

Lens 1: Pierre Bourdieu and the concept of habitus

Exploring Bourdieu's ideas, I looked first at his concept of habitus. It helped me clarify the impossibility of being objective about the field under examination because, in any field, the assumptions and qualification we make are solidified into a complex and complete worldview. We are, therefore, constrained by the assumptions and values baked into that field. Habitus as a concept, outlines and defines those assumptions and cultural constraints.

Bourdieu, in an early work, defined habitus as:

these generative and unifying principles which retranslate the intrinsic and relational characteristics of a position into a unitary life-style, that is, a unitary set of persons, goods, practices. Like the positions of which they are the product, habitus are differentiated, but they are also differentiating. (Bourdieu:1996: 15)

Habitus makes sense when it is contrasted with the concept of 'field'. The field is the environment in which habitus plays out. There is a critical link between them and the position of the observer/researcher. Lois McNay identifies the relationship in this way:

The embodied potentialities of the habitus are only ever realised in the context of a special field and, therefore, rather than being a generalised capacity, reflexivity is an irregular manifestation dependent on a particular configuration of power relations. (McNay, 1999: 109)

If habitus is a collection of hidden practices and understandings, then field is the stage where they are made manifest. This leads to a more interesting tension in times of turbulence and uncertainty, because the field is disrupted and loses what McNay called its efficaciousness and the power relations shift. There is a tension between the value and belief system of the habitus and the manifest environment of the field. These are the inflexion points that my research was able to highlight. This pointed the way to a complex journey outside the field to understand the core driving meta-processes. This was necessary to be able reconceptualise my understanding and, thereby, re-engage at a different level with a redefined field.

A field can only be 'efficacious if it is objectified in bodies in the form of durable dispositions that recognize and comply with the specific demands of a given institutional areas of activity' (McNay, 1999: 99). When it is not durable, the link is broken. During that period of turbulence, realignment occurs which allows the re-establishment of new linkages. Uncertainty also offers a moment to clearly observe the underlying tensions and values that the field embodies, as 'the way we do things around here' comes into question and dispute.

What emerged was an understanding that the field of learning and development was going through just such a period of disruption and turbulence. The field was disrupted, and the 'durable

disposition' was fading. The nature and limitation of its habitus were becoming visible and new ways of interpretation were emerging.

I had to establish whether I had, in the totality of my contribution, unwittingly reinforced a specific institutional area of activity by creating objectified bodies of work, whilst at the same time claiming to have transformed and realigned that domain. Therefore, the concept of habitus loomed large as a conceptual key and entry point into a framework for understanding the field I was describing. I could have been simply reasserting, in Bourdieu's words, that 'the complex strategies of a habitus shaped by various necessities can integrate the different necessities into coherent courses of action' quoted in an interview with Lamaison, (1986:119), rather than challenging and redefining the field.

The tension I needed to confront had emerged around a simple question: was I reintegrating the changes in the field in order to re-establish coherence, and thereby reinforcing the habitus, or was I indicating a pathway towards redefining the habitus by creating the opportunity for realignment and transformation of the field?

A strength of Bourdieu's theories is that they are non-deterministic. We are not trapped in the habitus. The concept can account for change, disruption and uneven dissemination. He does not see habitus as immutable because it is 'an *open* system of dispositions that is constantly subjected to experiences, and therefore constantly affected by them in a way that either reinforces or *modifies* its structures' (Bourdieu, 1992: 133; quoted and italicised by McNay, 1999: 103).

The core challenge for me was to attempt to navigate those dispositions and determine whether my work modified or reinforced the existing habitus. In other words, use Bourdieu's lens to

define my place in the habitus whilst looking again at the limitations I had imposed upon myself by constricting my concept of the field.

Lens 2: Roland Barthes, Davide Nicolini and practice

To understand the field more fully, I had to move beyond the context of that field and distance myself from, in Dr Kate Maguire's words, 'the discipline/domain islands' that had dominated my thinking, in order to produce any 'new learnings and syntheses' (Maguire, 2018). I needed to be clear about the nature of the habitus and how it defined the field in a process Pierre Bourdieu described as the need to 'objectify the act of objectification' (Lamaison, 1986: 111).

It was a process of re-engagement that would allow me to foreground what had hitherto been implicit and unclear in my work and make that exploration process transparent. I needed to dive into the cultural and field-based underpinnings of my ideas and insights. This process is described powerfully by Bourdieu, again quoted in the Lamaison interview:

one sees that it is not enough just to record the explicit rules on the one hand, and to establish the regularities on the other. One needs to construct a theory of the work of formulation and codification, of the properly symbolic effect which the codification produces. (Lamaison, 1986: 115)

I was suspicious that I had been carefully recording the explicit rules without seeing what they symbolised and codified. This context statement is the first attempt to undertake an examination to surface the 'properly symbolic effect' of my own, often unwitting, process of codification; to move, in Roland Barthes' words, from signifier to signified (1972: 114). And, therefore, recognise and make use of my own logical shift from author to reader; understanding that the focus should be on what is there, not what was intended.

Barthes summarises that in a short essay published in 1977 where he claims the focus on the reader can only occur at the cost of the death of the author. The text itself is where meaning resides, not in the intention or the desire of the author. I had to reflect on the process I had been part of, not the product, and in so doing focus on the ‘social *usage* which is added to pure matter’ (Barthes, 1972: 108). The facts I was defining and elaborating were ‘tokens for something else’ and ‘significations apart from...content’ (Barthes, 1972: 110). And these were areas ripe for a new approach.

I had to leap from language to metalanguage, from sign to signification, and from praxis to parapraxis (Barthes, 1972). This involved stepping outside the comfort zone of a familiar and known world where I saw my role as describing and defining, into one of analysing and contextualising. This required a number of lenses to help me make sense of both the process and the ensuing product. This is the reason why I found the work of Davide Nicolini so enlightening. If Bourdieu had defined the scope of my operation, and Barthes had helped me understand the nature of the journey, Nicolini gave me the tools to undertake this exploration.

The dominant and resonating concept that emerges from the work of Davide Nicolini is his idea of practice (2011). Nicolini traces the history of the practice-based approach back to Heidegger and Vygotsky, and on to Bourdieu. When Bourdieu described his own work as ‘fieldwork in philosophy’ (Bourdieu, 1990b: 3), the link between the two thinkers becomes clear. Most of Nicolini’s insights emerge from fieldwork and detailed observation. He notes, by observation, what happens (in a medical unit for example) rather than describe the espoused, formal procedures. He tips the balance from individual competence to organisational knowing. In some ways that tracked my own evolution. ‘The learning-driven business’ (Garad and Gold, 2021), was much more complex than a business where there was a lot of learning! I encapsulated that conceptual shift by emphasising

the huge performance gap between organisations with culture of learning and those with an identified learning culture (Paine, 2019/2021).

Nicolini's key postulation is, in essence, a reflection on the nature of knowledge. For him, knowledge is not abstract, but contextual. It is a product of the totality of human experiences and practices, much in the way that Roger Martin (2009) describes reality. This is a non-representational and subjective view of knowledge: knowing for Nicolini is not a thing to acquire but a process to participate in. It reflects what we are, what we have done and where we are at a specific moment. Knowledge cannot exist outside our experience of the world. Nicolini sums this up succinctly when he claims that organisational knowledge is:

a form of social expertise and collective knowledgeability, and is knowledge-in-action situated in the historical, social, and cultural context from which it arises...Practice constitutes the figure of discourse that enables reconnecting knowing with organising and is the empirical ground where such a relationship can be investigated. (Nicolini, 2011: 602)

I needed to reground my theorising, by taking account of 'what is actually done in the doing of work' (Orr, 1996: 439, quoted by Nicolini, 2009). Therefore, the concept of practice was central, as it suited my focus on the constraints and context of the field in which I was working. If Heidegger (1947) and Wittgenstein (1953) drew attention to 'the unspoken and scarcely notable background of everyday life' (Nicolini, 2009: 1392), my job was to use this process to foreground those work elements and make them visible or at least susceptible to analysis. This is an activity where the environment and context for work is, in Nicolini's words, 'turned into an epistemic object in order to enter discourse' (2009: 1392). Nothing exists outside its context, and organisational learning is, by definition, wholly contextual, and the learning it embodies is unique because it is encapsulated in the patterns of connection between people.

Nicolini used the metaphor of zooming in and zooming out to describe that process. It is designed to help ‘us see the connection between the here-and-now of the situated practicing and the elsewhere-and-then of other practices’ (Nicolini, 2009: 1393). The idea is to foreground what practitioners know but cannot necessarily conceptualise and articulate the nature of that work in order to situate it. Nicolini argues that ‘the effort should be concentrated on developing a type of theory that helps practitioners articulate what they already do, and therefore somehow know’ (2011(b):164). We are a long way from formal learning programmes and course prospectuses at this point, as we explore what is informal, social, and often unarticulated yet something that would be recognised as learning. This was what Jay Cross was exploring in his first book (Cross, 2007).

Nicolini claims: ‘Theorising practice thus requires a double movement of zooming in on and zooming out of practice obtained by switching theoretical lenses and following, or trailing, the connections between practices’ (2009: 1393).

At the heart of Nicolini’s praxis is the suggestion that the observation of practice is the only way to articulate the habitus and foreground the underlying base of knowledge and ideology. The two areas of theory and practice are not mutually exclusive but profoundly intertwined. And that the ‘institutional texture of social and organisational life is as an artefact and a provisional effect that is both the condition and the outcome of the practicing’ (Nicolini, 2009: 1413). What we know conditions what we do, and what we do is a condition of what we know. Nicolini demonstrates how it is possible to break out of the closed circle of knowing and doing to escape a mutually reinforcing process that inevitably leads to a point where no alternative perspectives are possible.

Practice is, by its very nature, bounded but capable of what Nicolini calls ‘poiesis’ –the act of creating something new. This is a product of ‘mutual engagement around uncertainty’ (Wenger,

2021), not the transmission of certainty which is the domain of much conventional L&D. And in some way these boundaries, and the focus on overcoming challenges, are the seeds for innovation. We create ideas and we innovate because we are ‘colleagues in adversity’ (Revans, 2011), rather than lost in abstraction or convinced of our own brilliance. The boundaries of those challenges and the nature of our understanding act as the collective grit that produces the pearl of insight. Even in our routine lives we are sometimes simply unable to reproduce and repeat this process, yet the very act of routine repetition can lead to improvisation and reproduction ‘on each novel occasion’ (Nicolini 2009: 1404/5). This is how organizational knowledge is built.

It is this co-creation of knowledge built around a common set of experiences that produces durable practice. Knowing is shared informally before it is codified and registered formally. So, all practices are sustained by their own explicit or implicit community, as Etienne Wenger would express it in the phrase ‘community of practice’ (1999). The community, critically, emerges out of practice and helps define, explore, and engineer that process of explication and objectification of knowledge, rather than the more traditional view where practice emerges out of community. The output of the community is not knowledge sharing, but engagement to problem solve when there are no obvious answers. The sharing is not the aspiration, but the by-product.

Practice may be recognised and acknowledged by codification, but not always. That is not a condition of the practice but the task of the observer. Nicolini cites Wittgenstein (1953) to support the idea that there can be no such thing as ‘private or arbitrary’ practice (Nicolini 2009: 1405) and all ‘tools and artefacts carry the script their designers embodied into them’ (Nicolini, 2009: 1406) and therefore a cultural significance and a location. This goes for search engines as much as stone axes. I had to make visible the hidden script of my own writing and my unseen codes to make sense of my own practice.

Finally, this helps explain how knowledge and behaviours are disseminated inside a given habitus. This is not an abstract intellectual and theoretical process but part of ‘a variety of states of affairs which, in turn, may happen far from where the practising takes place’ (Nicolini, 2009: 1411). We come to know as much through our shared practice across the field, however and wherever that sharing takes place. It is not simply a process of local problem solving. Therefore, knowing can be dislocated from doing, but at the same time is profoundly connected with it.

**Lens 3: Daniel Kahneman, James March, Roger Martin,
and Silvia Gherardi – Knowing and doing**

The concepts of habitus, field and practice make even more sense and align well when set alongside the ideas of Daniel Kahneman, James March, and Roger Martin. Kahneman and Martin both focus on the process of insight creation and how practice evolves through redefinition, reconstruction and reimagination. March looks at the inherent contradiction between the efficient exploitation of organisational output and the creation of new areas to exploit, and Gherardi helps us connect knowing with doing. Nicolini and Bourdieu would argue that this is not a process of abstract reinvention created in a vacuum of unknowing, but a cultural adjustment that allows habitus to reassert itself and practice to move forward. This is how the field maintains coherence in the face of challenge and disruption.

All four thinkers are fascinated with the complexity of that dualism between knowing and doing in context, rather than as an abstract idea. They would all agree that the context is the primary pathway to understanding and cannot be abstracted from knowing.

For Martin, this process is called ‘integrative thinking’ and it is the central conception of his book, *The Opposable Mind* (2009). He lists six key features that define this concept. They are:

1. Accepting that whatever models and world views exist, they do not represent reality.
 2. Embracing conflicting models and approaches. They are to be leveraged, not eradicated.
 3. Believing that better models exist that are not yet available.
 4. Knowing that these better models can be brought from abstract hypothesis to concrete reality in order to make a difference.
 5. Being comfortable and engaging with complexity in order to seek that better model.
 6. Being prepared to take the time needed in order to build that better model.
- (Martin, 2009: 89)

Martin’s world views are actioned in the evolution of Bourdieu’s habitus. To incorporate the concept of the habitus into Martin’s thinking reinvigorates his process because it lifts the concepts from the personal and individual to the communal and the organisational: from a solo focus on process, to a community of practice. Bourdieu also helps explain why the inexorable logic of Martin’s ideas does not inevitably lead to an eruption of change and innovation. The mental process described by Martin is deeply ensconced in its own set of values and assumptions, to the point where it is hard to leap out from its self-imposed constraints. Rather like sticky mud, the hidden systems, and assumptions of Bourdieu’s habitus cling around our metaphorical ankles and inhibit our ability to jump forward.

If we include the ideas that underpin Kahneman’s 2011 book, *Thinking, Fast And Slow*, weight is added to the argument. The book illuminates the different mental processes that underpin the fast brain’s need for clarity and quick decisions, which emerge from our basic human need to navigate complex landscapes and avoid danger to survive, and our slow brain which engages in slower, cognitive processes that allow us to reflect upon and, if need be, challenge some of our fast brain assumptions. That is how we learn. Our slow brain carefully adjusts to and builds new realities. This facet is something that we, uniquely amongst animals, possess.

We can situate Kahneman's perspective into that of both Bourdieu and Nicolini. It helps illuminate how the process of slow brain integrative thinking emerges into habit and new fast brain practices. And it shows how we can make convenient assumptions about our field that end up being 'intuitive, appealing and wrong' (Kahneman 2011:44), because the context has changed, but our fast brain leaps into action, and makes illogical and erroneous assumptions and poor conclusions emerge. Kahneman (2011) calls this 'the law of least effort' and it applies equally to learning and development processes as it does to the cost of a bat and ball (see Kahneman, 2011: 44). The source of this overconfidence is as much contextual, ideological, and epistemological as it is a lazy brain taking the path of least resistance.

There is a third, linked, factor and that is the power of insight that is driven by experience. The psychologist Gary Klein names three pathways to insight: the 'contradiction path', looking for inconsistencies; the 'connection path', looking for strange connections or coincidences; and the 'creative desperation path', where you need to escape an impasse and are, therefore, forced to make a decision (Klein, 2013: 134).

What Klein appears to be implying is that it is possible to bring years of practice to bear for that second's flash of insight. The fast brain can be informed by deep processes of knowing from the slow brain, but the context must be right. Insight is an important component of expertise; this is the ability to see clearly, recognise patterns, and make cognitive leaps in order to draw new conclusions, but it is bounded by the field it inhabits.

Insight allows us to hold contradictory truths simultaneously and synthesise them into something new. In a sense, it is a process of allowing a perception of reality to clash with an *a priori*

understanding, to create a new understanding. This is the point when the disrupted habitus re-engages and reasserts its primacy. To use these insights effectively requires ambidextrous individuals who can make sense of contradiction. If this is scaled up into a way of working, it can help us imagine ambidextrous organisations that can manage exploitation and exploration at the same time and are empowered and energised by that process of dealing with uncertainty. That is the nature of a learning culture. Gherardi sums up this process:

A better metaphor is that of an open conversation which develops as it proceeds. In this conversation, there are a number of voices representing discursive positions which, with the inevitable accuracy and distortion of labels, can be called situated learning theory, cultural perspective, activity theory and actor network theory. (Gherardi, 2000: 220)

This open conversation reveals that ‘practice is the figure of discourse that allows the processes of ‘knowing’ at work and in organising to be articulated as historical processes, material and indeterminate’ (Gherardi 2000: 220, 221). In other words, ‘practice connects “knowing” with “doing”’ (Gherardi, 2000: 218).

The logic of practice is necessary for the order and continuity of an organisation. Practical knowledge is kept within the *habitus*, which as the historical product of previous individual and collective practices, produces historical ‘anchors’ and ensures the correctness of practices and their constancy over time more reliably than formal and explicit rules. (Gherardi, 2000: 216/7).

What Gherardi is implying is at the heart of my understanding of a learning culture. It is the churning of insight developed from practice that allows an organisation to flourish and continue to succeed. It is not so much about rules, more about anchors. This process is informal and coded, it transcends the formal and the explicit. Gherardi sums this up beautifully when she describes the complex nature of organisational learning as ‘learning [that] takes place in the flow of experience, with or without our awareness of it’ (Gherardi, 2000: 214). This is the essential link between Martin, Kahneman, March, Bourdieu and Nicolini.

That process sounds logical and obvious, but it is extremely difficult to instigate. Part of the difficulty is that, for an organisation to act on insight, it needs to stop doing one thing so it can respond to something new. But managers are poor at letting go of their existing targets and processes, even if that activity is clearly not working. In his seminal article in 1991, James March drew attention to this tension by referring to the natural conflict in any organisation between the need to exploit existing systems to maximise efficiency (exploitation), and the need to innovate to discover potential new products or services to keep the organisation relevant and in touch with its customers and markets, (exploration).

The essence of exploitation is the refinement and extension of existing competences, technologies, and paradigms. It returns a positive, proximal, predictable outcome. The essence of exploration and experimentation is new alternatives. Its returns are uncertain, distant, and often negative. Thus, the distance and time and space between the locus of learning and the locus for the realization of returns is generally greater in the case of exploration than in the case of exploitation, as is the uncertainty. (March, 1991: 85)

To manage both the process of exploitation and exploration requires ambidextrous organisations. Although Martin does not use this specific term, his analysis of how organisations are able to reconfigure the world in response to contradiction or new opportunities is at the heart of his analysis. Only an ambidextrous organisation can manage the process of exploration outlined in *The Opposable Mind* (2009). It is about dealing with complexity, and this is problematic because our failure to acknowledge or deal with complexity is a fundamental, default human reaction.

In the face of contradiction, Martin argues that we cling on to certainty for far too long. We confuse our mental models with reality, and resist managing contradiction because it challenges what we believe is real. Therefore, any change is resisted. In other words, we refuse to see what is apparently obvious because it challenges what we *know* to be real.

One factory preset of the human mind is a tendency to assume that our models of reality are identical to reality itself. That conflation shuts down the latent power of our opposable mind before it can be engaged. (Martin, 2009: 50).

Mental constructions, according to Martin, do not represent objective reality but create the illusion of objective reality. The great thinker, in Martin's opinion, is the one who holds two opposing and valid views at the same time and comes to a new conclusion by synthesis. It follows, therefore, that being certain or being decisive too quickly can be the enemy of insight as a definitive view closes off any kind of contradictory view and challenge to the status quo. What is seen to be obvious is often only superficially obvious because what is obvious is driven largely by habit, culture and failure to acknowledge context. We see what we want to see, and that can be influenced by what others around us see and what we expect to see.

This leads to an ironic contradiction. A strong organisation with a coherent world view that manifests itself in a strong and readily transmitted organisational culture can reject challenge and contradiction and, therefore, fail to evolve. The culture percolates out like a virus inside the body corporate. March (1991) outlines how, ironically, the stronger and more pervasive the culture, the more effective the corporate immune system and the lower the chances for transformative change. Building a culture that constantly reinforces beliefs and values can also eradicate 'speaking up' and dissent.

One pathway through this contradiction is the concept of a learning culture. It can help explain how an organisation can possess a very strong and resilient culture, and still be open to new ideas. The introduction of new information from outside, that is rapidly shared, can act as an early warning system and can be transmitted very quickly into corrective action. Blockages occur, not because the culture is too strong to allow challenge, but because the organisation is not porous enough to be able to absorb new, challenging information. The ability to reset as the context and the

external threats manifest themselves through that ingestion process is very close to my definition of a learning culture and an illustration of its power.

A learning culture as I have defined it (2019/2021) enacts a strong process which allows an organisation to ingest and digest information from outside and circulate it rapidly inside to maintain a consistent yet ever-changing relationship with its external environment. It is a dynamic model and has much in common with the basics of aviation: the smooth flying of an aeroplane relies on minute and rapid changes in movement based on alignment with an artificial horizon. The information for this is provided by a gyroscope – the device which connects the pilot, metaphorically, with the external environment, by creating an artificial horizon. The pilot is always clear what the relationship of the plane's nose is to that horizon and can, therefore, make constant adjustments, or abrupt changes, to maintain equilibrium and set an accurate course with that horizon always in sight.

In the same way, an organisation with a learning culture is able to maintain a coherent and symbiotic relationships with its own habitus. The failure to heed the data coming from that gyroscope displayed in the cockpit and to take corrective action is as big a catastrophe for an organisation as it is for an aeroplane.

Lens 4: Carol Dweck, Chris Argyris and Martin Seligman – Mindset and self

The core purpose of Martin's *The Opposable Mind* (2009) is to define a process that embraces ambiguity and uncertainty to leverage the insight that emerges. This allows adjustments to be made and opportunities to be seized. The core of Martin's hypothesis is a belief that at the heart of complexity is a rich vein of innovation and development. Improvement and transformation are readily to hand if you dive below the surface and explore the logic of what Argyris (1977) called

‘double loop learning’. In other words, the explanation of the explanation; the underlying cause, the disease rather than the symptom. A fixed view of the world, with no margin for challenge, prevents this process from emerging.

Martin’s metaphor of the opposable thumb illuminates his thesis. Just as the thumb works in the opposite direction to the fingers and allows minute discrimination and tool manipulation, it follows, therefore, that if we can maintain an opposable mind, we can fine tune our ability to discriminate and explore new possibilities. The opposable thumb allows the hand to do more, and the opposable mind reveals alternative models and solutions.

His ideas relate closely to those of Carol Dweck (2008) and her concept of a growth mindset. Dweck developed her theory based on extensive observation of young children. Those with a fixed mindset – a propensity to give up rather than accept challenge; to work within self-imposed limits; and not to deal with failure – were less likely to overcome challenges and solve complex problems, regardless of innate ability, than those with what she called a growth mindset – the ability to strive and embrace challenge and learn from failure.

In the years since publication, it has been applied more generally, and the concept of mindset change is now an integral part of, for example, leadership development in many organisations. Mindset, observed Dweck (2008), trumped natural intelligence, because a fixed mindset tended to give up when challenged, rather than work on a problem and solve it. There is, however, still academic debate about the impact of mindset on achievement. Some studies have failed to reproduce Carol Dweck’s results, and academics like Timothy Bates of Edinburgh University are sceptical about the overall impact of mindset on cognitive improvement. Along with Yue Li, Bates claimed:

children’s mindsets were unrelated to resilience to failure for either outcome measure...Finally, in 2 studies relating mindset to grades across a semester in school,

the predicted association of growth mindset with improved grades was not supported. (Li and Bates, 2019: 1640)

Despite this, Dweck's concept is deeply embedded and widely accepted. If anything, her reputation continues to grow. Her 2014 TED talk, for example, has garnered more than 12 million views.

Dweck believes that a binary distinction exists between a fixed mindset and a growth mindset. In the former, challenges are avoided, obstacles are not surmounted, and the success of others is seen as threatening. In the latter, challenge is embraced, obstacles are overcome by persistence, and others' success is motivational and inspiring. It is important to note that Dweck's focus is on analysing the traits of individuals only, whereas Martin is describing the characteristics of people working in tandem to help solve what Grint (2008) described as 'wicked problems' inside organisations. Wicked problems are those that are not susceptible to an obvious or single solution or capable of being solved by experts (Rittel and Webber, 1973) and require a double loop approach.

The collective response is an important consideration when examining the impact on organisational learning. My key focus is on how those individual abilities can be orchestrated to form a collective and contested response to a specific challenge. This is the bridge from the individual to the collective and into the idea of a learning culture.

A learning culture sits somewhere between Martin and Dweck's concepts. It requires self-determined learning, or what Hase and Kenyon define as 'heutagogy' (2013). The concept describes people who can take charge of their own learning destinies without being instructed. It also defines a space where participants see themselves as both teachers and learners. This is built by, and helps

build, an organisational culture that can sustain experimentation, empowerment, engagement, and action. One follows on logically from the other.

Essentially, all these ideas can be traced back to the work of Carl Rogers (1967) where his ‘client-centred therapy’ merges into helping clients discover their authentic and resonant self, with the logical outcome and aim of that process building happiness (McKee, Boyatzis, Johnston and Johnston, 2008) (McKee, 2017). This is about being present, reflexive, and reflective, and making meaning from experience, thus allowing the emergence of self (Rogers, 1967: 5).

The key ingredient that takes us from Rogers to McKee is the important concept of positive psychology developed by the University of Pennsylvania’s Professor Martin Seligman (2002/2011). People enact an optimistic view of the world because they possess an embedded belief that the world can always be made better with the right mindset, approach, and the right ideas. All problems, regardless of their complexity, are susceptible to a solution if enough people with the right tools work on the problem with open minds. Key components are the ability to be reflexive (put yourself into the situation as a factor), and reflective (thinking about the situation deeply). For individuals, this process was summed up by Rogers as: ‘How had I come to think the thoughts I had? How had I come to be the person I am?’ as an integral part of his work with clients (1967: 3).

There is a logical extension through Argyris (1992) to Martin (2009) and via Seligman’s broader sense of wellbeing, that moves from an individual focus to wellbeing in society. Seligman’s definition of ‘prosperity’ as a combination of ‘wealth and wellbeing’ (2002 and 2011: 236) evolves into his later concept of PERMA: positive emotion, more engagement, better relationships, more meaning in life, and accomplishment (2011: 242). At this point Seligman begins to push the

envelope from individual wellbeing to societal wellbeing in articulating his ‘long mission’ for positive psychology (2011: 240): to help the world flourish!

Martin sees a power in the collective. He understands business expertise to be holistic, relying on both knowledge and mindset. This is not the same as deep expertise in one of the business functions such as finance or marketing. Martin’s integrative thinking is about focusing on the whole, rather than any single element. And it concerns the application of broad-based knowledge, drawn from both inside and outside the organisation, to innovate and move forward.

An integrative thinker does not consider a company’s financial position in isolation, nor any other single factor but ‘keeping in mind the whole while working on the individual parts’ (Martin, 2009: 43) and attempting to discover the ‘patterns, connections, and causal relationships’ (Martin, 2009: 68). This process avoids the dangers of using a single frame that can, potentially, distort the whole picture and instead focuses on organisational knowing.

Keeping in mind the whole involves a more complex approach, searching for alternative views and using diverse teams from across the organisation, rather than like-minded individuals, to generate meaning. Insight and meaning emerge from those challenging and contradictory interactions, and they occur naturally in the space between people, not from a single mind (however brilliant) or a single frame (however compelling).

This process opens up the possibility of diverting into complexity, rather than rushing to an obvious (and possibly incorrect) solution. It implies an ability to accept untidiness and contradiction and embrace discordance. Holding off the desire to rush to a solution allows a more complex, enduring and more profound solution to emerge. It might take more time, but it takes us closer to the

root cause of the problem. In IDEO's model of design thinking, for example, there is a correlation between the longer a divergence of view is sustained before converging on a possible solution, and the quality and viability of the resulting idea or solution. Bruce MacGregor described this process in a presentation called "Design for Change" at a Duke University Leadership conference in 2018.

Martin (2009: 103) analyses what he calls our 'personal knowledge system', or our way of interpreting and acting in the world. He breaks this into three fundamental components, starting with our stance, which defines who we are in the world and what we are trying to accomplish. Our stance, in turn, determines the tools and models we use to organise our thinking and understand the world. These in turn guide our experiences as we hone what he calls a repertoire of 'sensitivities and skills' (Martin, 2007: 81).

It also works in reverse: our experiences inform the tools we choose, and our tools influence our stance. What we stand for influences our experience, and our experience influences who we are. The path we choose is reinforced rather than challenged by our world view and skill set. We make choices that are neither random nor objective, but we think they are. This can be problematic. If we find no opportunity to challenge that closed circle of belief created by a specific world view, determined by a particular model of mind, and linked to related action, it is hard to see the world any differently. We are almost back to the therapy room as one of Carl Roger's clients!

It also follows, however, that if you can change that stance by immersing yourself in contradiction and challenge, it is possible to change the experiences and the tools that define that stance. This is one way of experiencing the world differently, to make leaps of belief and understanding. The process Martin thus describes focuses on working together to reflect on action, as well as undertaking what Ellis (2005) calls 'after-event reviews' to better understand the different

viewpoints, so that learning can emerge and change take place. It also recognises that the individual is part of the context, not extracted from it. This process is thoughtful and patient, and demands the maintenance of contradictory views until the right outcome becomes clear.

Mental constructions are not objective reality. It follows, therefore, that being certain is often the enemy of insight as it closes off any kind of contradictory view. What seems obvious is often only superficially so, because what is obvious is driven largely by habit, culture and failure to acknowledge context. We see what we want to see! To break that means being able to work with untidiness and contradiction because the resulting resolution is more elegant and more profound because it is slower to emerge.

Lens 5: Donald Schön and Jack Mezirow – How we know and how we learn

Eraut (1995) acknowledges a binary movement in the process of reflection. There is, on the one hand, the slow, careful thought outside practice; on the other, a rapid ‘intuitive’ process that takes place in the moment. Each will deliver a different outcome for a different purpose. If practice is to evolve, it requires both the quality of insight to fine tune action that can only be born from direct engagement, as well as the cool, deliberate thinking about action outside of the moment, or after-action review.

This complex process was described by Donald Schön (1970) in the sixth of his Reith Lectures for the BBC, entitled ‘What can we know about social change?’

It requires that we be willing to regard every theory, every perspective that we develop, as a perspective that can shift at the same time as we’re taking it as a basis for action. It requires that we be willing to deal with the fact that people tend to see problems in different ways. It requires that we be willing to use ourselves as informational instruments, to be attentive to our own feelings as sources of data, as good as and in many instances better than any source of data presented to us by the

situation that we're in. It requires that we be willing to work on problems in the absence of clear ideas for the solution of the problems and see those notions for a solution grow inductively out of the efforts that we're making to cope. (Schön, 1970: 6)

He describes a process of inductive logic rather than a deductive process because it is the only way to make sense of contradiction without first eradicating dissenting elements. This distinction is very helpful as that focus on inductive logic explains the difference between the reflection on the works I created, and the reflection on the creation process during the writing. Reflectivity merges into reflexivity. The reflection on the data and evidence I was gathering allowed me to draw deductive conclusions during the writing process; one point led to another and to a conclusion; many conclusions led to each book's perspective. Here the conclusions emerged, as the new evidence became apparent. The book's conclusions evolved from the research, rather than research being sought out to justify an *a priori* conclusion. Nevertheless, meaning was imposed on that data.

The process that has been undertaken for this doctorate requires inductive logic. The fragments of perspective and world view have been used to throw some light on an altogether more subjective process, where my increasing distance from corporate learning and development led to a shifting placement of the viewpoint and therefore of new understanding.

Each book's conclusions are meaningful in the context and perspective from which each book was written. Deductive logic led me in a specific direction and helped me shore up meaning. Inductive logic has allowed a fragmentation and clarity based on the perspective and position of the reader. In the writing process, I used my prior experience and expertise to jump forward to insight and resolution. As that experience evolved so did my perspectives. In the doctorate, an inductive

process led me to be able to deconstruct those perspectives and analyse the ebb and flow of meaning from a zoomed-out position, and also zoom in to track the detail of the journey.

Despite an explicit praxis that let the evidence speak, and a commitment that all conclusions should emerge from evidence, it has become increasingly clear that my own deep immersion in that habitus meant I could resolve tensions and deduce firm conclusions by selecting evidence (consciously or unconsciously) that somehow justified my approach. Therefore, the process I went through in the creation of the public works, and the process I am pursuing now, are not aligned. It is not a case of deeper reflection leading to a reconceptualisation. It is rather that the frames described in this chapter offer new lenses of insight that allow me to see my work differently and in its broader context. What it reveals is a different author emerging from the writing, rather than the writing emerging from the author.

Applying these frames to the public works selected, over the course of the next four chapters, will reveal the strengths and weaknesses of the chosen perspective and illuminate the evolution of my thinking and my ideas. In some direct way, the relationship between the conceptualisation and development of the PennCLO executive doctoral programme led logically and coherently into the desire and motivation to write each of the three books. I had, until this point, neither recognised nor understood the tight linkages. In Mezirow's terms, it was a process of transformative learning.

Mezirow argued that transformative learning 'is learning that transforms problematic frames of reference...to make them more inclusive' (2003: 58). In that sense the writing of the books was what Habermas (1984) called instrumental learning: controlling and manipulating the environment to make sense going forward, whereas the doctoral thesis is more akin to Habermas's communicative learning. Here, the assumptions and the intentions of the author are made evident. The former

process looks not at what is true, but what makes sense. My conclusions are what Mezirow calls a 'more dependable tentative working judgment' (2003: 60). I have, therefore, taken a perspective about my own perspective, and for Mezirow this is an essential condition of transformative learning (Mezirow, 2003: 61).

Conclusions

Having looked at my public works through the lenses listed above, my understanding has shifted. There have been insights that surprised me, and elements that emerged in the writing that had been invisible up to this point. In many ways, I deliberately did not look through a single lens, but through various conceptual frameworks that revealed different elements of insight. Each frame has a greater or lesser role depending on the material being investigated.

1. A recognition that the concept of habitus offers a way to illuminate and understand the limitation of a specific field. It reveals, too, the impossibility of objectivity because the environment defines the parameters of understanding. I had always understood that exploring my practice was the only possible way to analyse the patterns and structures that could lead to understanding. That mixture of observation, interview and clarification through close examination of the literature was a standard part of my existing methodology when writing, and a way of making sense. As I moved through my career, I increasingly challenged observation and assumption with evidence and research and accepted less and less at face value. The shift here is that the elements of that metaverse are now recognised as a unitary set of 'persons, goods and practices' which are played out in a defined field and which I had fashioned. I had seen the field, but not understood the power of the habitus to define a way of seeing that field. To make sense of the field required reflexivity: seeing myself as integral to the environment, rather than trying to extract myself from that environment.

2. Nicolini (2011(a)) demonstrated that fieldwork and observation deliver powerful insights when the position of the observer is clear and understood. It is focusing on, according to Roland Barthes, (1972) the significations and interpretation of the signs, rather than simply recording the signs themselves. That move from omniscient author to fallible reader is a very important shift because it recognises that knowledge is not objective and does not exist outside experience but is defined by that experience. Nicolini's critical insight that practice was 'the figure of discourse that enables the reconnecting knowing with organising' (2011(a): 602) and that 'knowing is something that we do (and which we are)' (2011(a): 602) helped me to recognise that remaining in one place, and offering a commentary on the organising, whilst simultaneously assuming that knowledge was implicitly embedded in that process, was not sufficient. By reconnecting knowing with organising, I saw an entirely different world where the nature of the relationship was the key. I had to fine tune my observation and zoom in and out to see the contextual complexities of that practice.

3. Nicolini's metaphorical construct of zooming in and zooming out allowed me to track the connections between my public works in a way that I had not perceived previously. This movement from observation to what Nicolini calls the 'underlying base of knowledge' brought together the theoretical models that I acknowledged with a new rigour, alongside practice. Selecting what I explored, I realised, conditioned what I discovered; what I discovered allowed me to imbue meaning. I had to see myself, in the words of Donald Schön (1970), as an 'informational instrument'. Self-conscious recognition of where data was gathered, using different sources and perspectives, allows inductive logic to prevail over deductive logic, or one process to act as a foil for the other.

4. This concept of a fragile reality that was neither permanent nor external to the process of knowing was further highlighted by the work of Roger Martin and Daniel Kahneman. Models of the

world do not represent reality but are the constructs by which we build security and confidence. Just like Kahneman's fast thinking. Our brain desperately wants to make sense and once we have that model it is hard to let it go and reframe or add perspective. To accept that models are just that, allows the embracing of complexity and the holding of conflicting models at the same time to consciously develop new models and new solutions. Martin took me into the realms of contradiction and change. These are difficult and hard-to-convince concepts for the unwary, but enormously liberating. A process I experienced as I wrote this dissertation.

5. Gherardi's critical definition of organisational learning as 'learning that takes place in the flow of experience, with or without our awareness of it' (2000: 214) surfaced ideas insights into how our organisations learn, in the context of my own practice and tentative steps to understanding.

6. March's 1991 article on exploration and exploitation in organisations helped me see how organisations develop fixed views of the world due to the inexorable logic of efficiency and effectiveness. They need to service their customers in the best way they can, and that involves consistency and repetition. However, those same systems prevent organisations moving forward and embracing innovation or radical change. This is Christensen's 'innovator's dilemma' (1997). What makes an organisation successful contains the seeds of its ultimate failure. The seductive power of 'positive, proximal, predictable outcomes' (March 1991:85) obscures the contradiction embedded at the heart of those assumptions. And it is hard for ambidextrous organisations to build the right conditions for dialogue and debate to flourish. That takes a special kind of process. Our personal knowledge system becomes our organisation knowledge system, and vice versa. These are formidable, closed circles to break out of.

7. The final frame emerged from Chris Argyris's work on organisational learning and single versus double loop learning. He helped me see the difference between individuals learning in organisations, and organisational learning. This explained why an individual committed to learning does not naturally and inevitably transform or link from individual knowledge to organisational knowledge and insight. Letting conclusions emerge and sway decisions across an organisation was a far more complex idea than I had ever previously assumed.

It is with these frames in mind that the reflection on my four public works was undertaken.

Chapter 3

PennCLO executive doctoral programme

Forests mend and shape themselves through subterranean synapses. And in shaping themselves, they shape, too, the tens of thousands of other, linked creatures that form it from within. Maybe it's useful to think of forests as enormous spreading, branching, underground super-trees. (Powers, *The Overstory*, 2018: 219)

The characteristics of the CLO executive doctoral programme

The PennCLO programme is approaching its fourteenth birthday. This doctoral programme from the oldest university in the USA and one of the most prestigious universities in the world (*Times Higher Education*, 2021) started with huge ambition and continues with much the same impetus and confidence. The programme was never set up to be just another qualification or a reflection of the world as it existed; its fundamental purpose was to challenge and transform the status of learning and development in organisations and put it squarely at the heart of business strategy and organisational development. In some small way, my involvement as both an insider and outsider in the programme, in every one of its guises, reflects this conscious attempt to be controversial and offer a 'different' kind of doctoral programme.

I am not an academic, and the value I added was as a practitioner deeply embedded in practice and therefore a critical commentator on the entire academic process from a practitioner's perspective. This ability to stand outside the university and its rules and regulations was seen as an asset, not a disability! Although the university administration took a little convincing about this, I do have a valid role.

I was able to focus exclusively on impact and habitus rather than on regulations concerning doctoral programmes at the University of Pennsylvania. After 14 years, much of the complexity of the labyrinthine rules and regulations still escapes me. I know more than I did, but not a lot more – the intricacies and significance of grade point average remain perplexing. My role involved stepping outside the programme and looking at it from an industry perspective and concentrating on how the practice of the participants could be challenged and developed.

My other key role was to step inside the processes of the programme as it evolved, and act as an adviser on content, relevance, and approach by reflecting back into the programme the insights and lived experience of the participants. This doctoral programme was co-created, with the co-creation process largely channelled through me. I was able to foreground what practitioners knew, but cannot necessarily conceptualise, and articulate the pathway towards a new kind of seeing. This would, in turn, help the student zoom out from his or her, often fixed, perspective.

This is a viewpoint situated in the here-and-now. Students knew the reality embodied in a specific organisation, at a particular stage of development, with a clear allocation of role and responsibility for a particular brand of corporate learning. This process enabled them to move into what Nicolini (2009) called the ‘the elsewhere-and-then’ of other possible frames and new understandings: from exploitation of what is, to the exploration of what might be.

Nicolini argues that ‘the effort should be concentrated on developing a type of theory that helps practitioners articulate what they already do, and therefore somehow know’ (2011). That creates a perspective that flows into what they cannot articulate, and therefore do not know, but might be the locus for transformation. As the programme evolved, the idea of personal and organisational transformation became a more explicit core proposition.

The programme unwittingly and unconsciously practices a double movement that involves examining existing practice in the light of alternative theories, adding insight to experience. The aim was to ensure this information was challenging and broad-based, so they could make sense of their experiences in different ways.

This reflects a process that Roger Martin articulates in *The Opposable Mind* (2009).

I have paraphrased Martin's six key features of integrative thinking (2009: 89). In retrospect, they read like a set of objectives for the CLO programme:

1. Accept that existing models and world views do not represent reality.
2. Embrace conflicting and opposing models and approaches.
3. Believe that better models exist, even if you cannot imagine them yet.
4. Believe that we can improve our practice.
5. Engage with and work through complexity
6. Take the time needed to build that better model.

As the student progressed along the academic pathway, I saw that a key role was required: to act as the bridge between the often deliberately contradictory – and sometimes confronting – input, and the current practice of corporate learning. The purpose was not to smooth out the contradictions but amplify them to make sense of complexity and uncertainty. To begin with, I assumed this role as an occasional intervention in some of the blocks. But pressure from the students to continue, together with the need to support the rebuilding of the programme under the vision of a new Programme Director, Dr Annie McKee, led to a consolidated and visible role as Academic Co-Director in four of the five taught blocks.

The taught blocks are the foundation components prior to the academic research. The five are: technology; learning; business; leadership; and evidence (which covers research methods). Each taught block comprises a week on campus (although recently transitioned to online learning), a

month on assignments and group activity from home, and then a second week ‘on campus’. Those five taught blocks are delivered in sequence over 18 months, at which point they recycle.

My consolidated role shifted from an ad hoc, below-the-radar, occasional intervention, to an official role that was part of the programme’s DNA. In some way, that shift mirrored a profound change to the programme’s purpose by embedding contradiction as a conscious element, brought on in part by the embracing and celebration of increasing diversity in the student cohorts. In addition, the students’ roles had moved well beyond learning and development. Essentially, the programme was appropriate for anyone looking deeply at the people role in organisations.

When Dr Annie McKee took over the programme in December 2012, she made a conscious and very successful effort to increase the diversity of race, gender and role, coupled with the recruitment of students from a wide variety of backgrounds and broad geographies. This was a deliberate introduction of grit into the comfortable academic oyster bed.

The fact that the students did not have anything like a singular homogenous view of the role of talent and learning inside organisations, amplified the debates around meaning and method. The aim was not just to help people to additional insight, but to transform their way of looking at the world: from unquestioning exploiters of intellectual capital to hyper-aware explorers, seeking out new sources of intellectual capital.

The development of a culture of exploration and challenge

If we consider March’s 1991 article, *Exploration and Exploitation in Organizational Learning*, its logic can be equally applied to the learning process in the doctoral programme.

It is worth repeating March's separation of the two concepts.

The essence of exploitation is the refinement and extension of existing competences, technologies, and paradigms. Its returns are positive, proximate, and predictable. The essence of exploration is experimentation with new alternatives. Its returns are uncertain, distant, and often negative. (March, 1991: 85)

Essentially, March is exploring the counter-logical idea that the returns of what he calls 'faster learning' (1991: 76) that create homogeneity through the organisation are not all positive. To acquire new knowledge requires diversity of thought, not a strong homogeneous culture. The introduction of new blood, and therefore new perspectives, is a critical element of this process because once established, what was 'new' is absorbed into the dominant culture inside an organisation and becomes the source of fewer and fewer transformative ideas. Therefore, more new blood is required for new ideas to emerge: 'the development of knowledge may depend on maintaining an influx of the naive and ignorant, and that competitive victory does not reliably go to the properly educated' (March 1991: 86).

Using March as a lens, I can clearly see that my role in the programme was to deliver that element of unorthodoxy. I simply had a different perspective because I understood the reality of organisational learning. I may not have had an orthodox academic career, but I did offer insight into what was 'new' and challenging and I could act as a conduit to draw out the insights and contradictions that emerged inside the group and allow these to be discussed. The programme consciously built a safe space for challenge and debate. This bedrock allowed the process of co-creation to emerge without that being explicit or defined. In many ways, this was Dr Annie McKee's greatest contribution: to switch the emphasis from content to process, from knowing to unknowing, and from reinforcement to challenge.

The university readily takes on the mantle of its founding father, Benjamin Franklin, in science, politics and business. It is an unapologetically well-resourced and elite institution that does not need to seek anyone's approval to move forward or stay rooted in the past long after this is helpful. One of Franklin's many aphorisms: 'Look before, or you'll find yourself behind' (Franklin, 1734) seems an entirely appropriate seven-word description of the university's mission. It is also the fundamental aspiration of the PennCLO executive doctoral programme.

'Looking before' highlights the original *raison d'être* of the doctoral programme. There was a truly subversive edge when the programme was initiated. Its aspiration was not to simply echo the existing world of corporate learning but to infiltrate its habitus and reshape it. The founding Academic Directors wanted to create a shock force of smart people who, as graduates, would see their role inside their respective organisations through fresh eyes and with a re-energised belief in their capacity to shape its future. This view has strengthened and become more complex over the years and has been reimagined under new academic leadership.

The explicit aim now is to develop a cadre of diverse scholar-practitioners capable of challenging deep-rooted assumptions about the status and purpose of organisational structures, culture, societal systems as well as human behaviour.

The origins of the CLO programme

The original idea for this programme emerged during a conversation between the then Associate Dean of the Penn Graduate School of Education (GSE) with the then Associate Dean from

the Wharton School. The aim was to devise a programme that had both generic exposure to business disciplines alongside a deep understanding of adult learning. Whereas many specialisms such as finance and marketing had long-standing specialist MBAs, learning professionals had no equivalent credential. It was also the first of what was hoped to be several significant joint programmes between the Penn GSE and the Wharton School. In early discussions, the idea moved from a specialist MBA to a doctoral programme because it was felt a doctoral degree would increase the status of the participants and deliver valuable research. The seniority of those applying would also rise.

As a practicing CLO at the BBC, I was invited to join the two academics in Philadelphia to work out if such a programme was viable and, if so, how it could be shaped. Our roles were clear: they were the academics, and I was the practice professor, sense-checking the theory. And that early triage model has been retained throughout the history of the programme. This was not an abstraction, but an integration of theory and practice. Davide Nicolini (2011 (a)) captures this idea when he talks about ‘reconnecting knowing with organising’ and creating an ‘empirical ground where such a relationship can be investigated’. The programme was an embodiment of that empirical ground. Each participant, once the programme was up and running, would contribute another element to that ground for investigation. The programme would explore the habitus, not in an abstract, distant way, but by having the habitus at the heart of the investigation.

On that first afternoon, we sketched out the compulsory foundation blocks of the programme: obviously business acumen and learning were core. Then leadership came next and, as technology was an increasingly inescapable component of learning in organisations, it also went in. Finally, a block on research methods was added. We called it the ‘evidence’ block and included it as a bridge into, and preparation for, the research skills required in the final dissertation block. Those blocks have remained, although the actual content has been modified many times.

The shape of the programme was also established at that first meeting: each block was given a dumbbell structure. This involved one week full-time in classes at Penn, followed by one month online, doing research and writing, then one further full-time week at Penn, followed by submission of three or four assignments and completion of the block. After two months, the next block was scheduled. The framework demanded the completion of three taught blocks a year, roughly one per semester. The five taught blocks took around 18 months to complete and then, after completing and passing comprehensive exams (known as ‘comps’), the final dissertation block was designed to take a further 18 months.

The bureaucratic brilliance in the programme design was in the allocation of teaching hours. The two Penn academics were able to precisely match the minimum contact hours required by the university regulations for any full-time Penn doctoral programme, to the shape and structure of the CLO programme. It was part-time, but because of the contact hours it was classified as notionally full-time. The implication of this was that, in a minimum of three years’ study, a student would emerge with a master’s and a doctorate (Ed.D.) from a prestigious Ivy League institution, whilst continuing to work full-time. This was very time efficient and an exceptionally attractive prospect for its target group: senior executives at roughly vice-president level and above, who were already acculturated to the fee structure of an Ivy League university.

The whole programme illuminates Nicolini’s concept of ‘practice’ (2009). This means that, far from keeping work and study separate, the course work and any research undertaken was designed to focus on each student’s organisation and their specialism to deliver improvements, realignments and help generate answers to wicked questions. The CLO programme was not intended to operate outside the role of each student, but was designed to integrate with that role, and sit inside

practice as a critical lens to challenge and improve that practice. Integrating the learning was core from day one, based on sense making and constant realignment. McNay (1999) describes this as the realisation of the embodied potentialities of the habitus in a special field, ‘an irregular manifestation dependent on a particular configuration’. The programme could introduce a disruptive element to the habitus, but the nature of the disruption depended on specific contexts. The generic field was a patchwork of smaller, more know, contexts whose interplay illuminated the whole.

In other words, as Nicolini urges in his 2011 (a) work, the implicit aim was to ‘turn [work] into an epistemic object in order to enter discourse’. Although not all work could be incorporated in this way in all circumstances, it remains the fundamental nascent seed of an idea which took root and still resonates. This was fieldwork through the lens of academic research. In exploring the habitus, the programme modified it. The programme took the students outside their field ‘to understand the driving meta-processes, in order to be able to reconceptualise those processes’ (McNay,1999) and improve them. At the heart of that original idea was a belief in the power of an academic institution to be able to explore the habitus by simultaneously engaging with many complex elements of the field.

What was surfaced was the unconscious process that occurs when the tension between the validated knowledge of academic practice and the tacit knowledge emerging from the field confront one another. This leads to insight which is ‘embedded in practices...which is therefore learned through participation...[it] is a knowledge which comprises numerous elements of habits, habitus and habitualisation’ (Gherardi, 2008). The programme sought out the space between theory, habit and action to enable the students to review critically the general habitus in which they operated, mediated by the explicit fields of work in which they were deeply embedded.

The spread of the programme's graduates, and the impact of their doctoral research, was very much like the network of subterranean synapses that Richard Powers describes in his novel, *The Overstory* (2018). A process, beginning slowly but progressing steadily, was designed to change the fundamental learning and development agenda. Each of the graduates, like a tree in Powers' fictional forest, only *appears* to stand alone. In reality, they are part of a network that is nourished by each piece of new research and each new connection. The aim was, to quote the title of Nick van Dam's 2018 book, to inaugurate a process of 'elevating learning and development' and in so doing radically transform organisations. 'Elevate' in both the sense of raising its status and changing the perspective to enable a broader vista. This permitted the work to be seen in a more complex and multidimensional context.

The evolving status

The programme continues to make an impact. By late 2020, 119 students had graduated from the programme, and there were around 42 at various stages of research in the dissertation block (UPenn, 2021). There are never fewer than 30, nor more than 38, students moving through the initial five taught blocks. This means the base is now very stable, with a pipeline of applications that far exceeds the number of places available on the programme.

Much of that continuing appeal (which remains as strong with the mid-2020 enforced move to online as with the Penn-based face-to-face model) is generated by the lack of any commitment to specific content beyond a basic area of enquiry. This means that topics are not predetermined but approached in different ways each time a block is run. Its main strength is using the fixed curriculum structure to explore and challenge. Fundamentally, the programme helps its participants think

differently about the world, using their specific context as a starting point. This is, potentially, an extensive health check for the organisation as well as a profound personal transformation.

The explicit aim of developing a cadre of scholar practitioners has increasing relevance as the external environment becomes more disrupted and unstable. Peter Checkland (1999) defined this process by distinguishing between hard and soft systems thinking. The 'hard' tradition 'assumes that systems exist in the world and can be engineered to achieve objectives' (Checkland, 1999: 47). This concept of hard systems thinking is a key feature of most postgraduate programmes aimed at organisational development or learning technologies.

This makes fundamental assumptions about the stability of these environments and defines the expertise necessary to interact effectively with them. It does not challenge the purpose or the meaning. The programme is designed to deliver deep and immediate expertise in a specific, predetermined field. This is contrasted with the concept of 'soft' systems thinking.

The soft tradition assumes that the world is problematical, always more problematical than any of our accounts of it, but that the *process of enquiry* into the world can itself be engineered as a learning system, one in which soft systems thinkers have the option consciously to adopt the hard stance if they so wish. (Checkland, 1999: 52)

In the PennCLO programme there is a point in the exploration process, usually after the blocks, where students must adopt a hard systems stance and define which specific pre-existing environments or challenges, they wish to investigate. But they are encouraged to explore the habitus fully before making that decision and that commitment. In other words, they are asked to hold the contradictions they experience for as long as possible before drawing a conclusion about direction and defining a clear research question they wish to explore. Fast thinking and instant decisions about

the nature of the problem are replaced by reflective, slow thinking to use Kahneman's (2011) analogy.

The programme deliberately delays any conclusions about work by slowing down the process of reconnecting with work and replacing the known with enquiry and debate rather than certainty. This demands reflection, challenge and the engaging of the slow brain. The impact of this thinking shifts the students from fast-reacting, short-term goal orientation. Instead, they are asked to reflect deeply on their practice in the light of new information or ideas. The process of enquiry itself becomes a learning system. The students open themselves up to challenge. This reflects the point made by Michael Eraut (1995) when he acknowledges a binary movement in reflection. The development of practice is based on both the quality of insight born of direct engagement, as well as the cool, deliberate thinking about action, outside of the moment.

This process appears to be particularly relevant at a time when conventional approaches are not working, and when the challenge of the Covid-19 pandemic has been joined to fundamental issues around racism and inequality in society and the workplace. This has turned the participants' assumptions of what their role should be upside down. The students are asked to reflect on those bigger systemic and epistemic issues. In grappling with these implications, perceptions of role changes emerge, along with new insights and new solutions. As the programme has no fixed curriculum beyond the topics, it is easy to flex and adapt it to current issues and challenges. The Academic Directors have implicit permission, so to speak, to worry less about content expertise and more about process expertise. In other words, focus not so much on 'what' but on 'how'. This allows elements of experiential learning to emerge. Several of the programme's fundamental characteristics have explicitly reinforced this direction and have, therefore, helped it remain fit for purpose and aligned to need.

Inherent exploration

In March's sense (1991), there is always 'new blood' introduced into the programme because of its cohort structure. There are three annual entry points: one per block. This creates a continuous process of readjustment, and refreshment for the group and an opportunity for exploration, as each new block has students beginning their learning journey, as well as those about to leave the blocks to begin work on their dissertation, and every stage in between. This in-built disruption fundamentally challenges the long-term homogeneity, which means the community must constantly rebuild and reassert its values at the beginning of every block. It also offers significant opportunities for mentorship, as all newly arrived students are helped into the programme by their more experienced colleagues. And each new group of arrivals is challenged to come up with a cohort identity and given opportunities to work in their unique cohort group, so they form a tight bond.

These connections are left to the students to manage and constitute student activity that is largely invisible to the faculty but hugely important for the students, and for the stability and coherence of their learning experience. It also builds a community of practice that is solid from day one to graduation and beyond. Few doctoral programmes have this amount of overt support and covert encouragement.

The impact of these constant realignments around the student groups would appear to mirror the research conclusions drawn by King and Kitchener: 'by understanding how such behaviours are grounded in their epistemic assumptions, and how these assumptions about knowledge and how it is gained are related to the ways students justify their own judgments about controversial issues' (2004: 17).

In this instance, assumptions about knowledge, and firm conclusions on controversial issues, are disrupted by the challenge of new students with different perspectives and points of view. The programme is in a constant flux so there is no fundamental epistemic assumption that dominates, and therefore core understandings are sometimes challenged, allowing new perspectives to assert themselves. Each cohort identity is reflected by the name the cohort selects for itself, which in turn reflects some of the unique attributes of its members. It is an early attempt at ‘epistemic assumptions...[and] assumptions about knowledge’. (King and Kitchener, 2004:17)

One impact of that creation of close-knit groups is demonstrated by the overall doctoral completion rate. More than 96% of the students who enrol go on to complete the programme. This figure has remained constant during the rapid growth phase of the programme.

Contradictions

The radical cycle of exploration in the taught blocks is forced to submit to a more prosaic process of exploitation of knowledge during the dissertation block. There are formal requirements that every Penn doctorate must meet, and the freedom of the PennCLO programme with its own values and processes, gives way to a tight university doctoral process. If you leave with a doctorate, it means you have met the same scrutiny and standard as every other doctoral student from the university. This is both an enormous bonus, in that the Ed.D. has the same weight as any doctorate from the University of Pennsylvania, and a constraint in that many process freedoms are curtailed. The dissertation is standardised in terms of length, medium, and the production process.

To help the students adapt quickly to the rigours of academic writing and the demands of APA style guidelines, skilled editors, who have worked with the programme for over six years, comment in detail on drafts of chapters and help the students make the leap from free-flowing ideation to the discipline of producing a formal academic dissertation. This is ‘a transition from symbolically mediated to normatively guided interaction’ (Habermas 1987: 12).

The process is initiated by teaching assistants (TAs) co-marking key assignments in most blocks. This gives an early indication to students of the standards of academic writing that are mandated. The TA comments not on content *per se*, but the quality of the academic writing and its adherence to APA format guidelines. This support defines the point where the Penn requirements override all others. It is almost like the constriction that Jürgen Habermas describes in *The Theory of Communicative Action* (1987:40) where ‘the signal-language mechanism of co-ordinating action...shakes the foundations of symbolically mediated interaction’. And then a point is reached where ‘their action can no longer be co-ordinated via signals’ (Habermas, 1987: 40). ‘Thus, with the assertoric mode of language use, communicative acts gain the power to co-ordinate actions via rationally motivated agreement’ (Habermas, 1987: 40).

The use of language changes, but the ‘action intentions’ are guided by the goals and aspirations set earlier in the programme. The different mode of discourse informs the formal process of action co-ordination and helps establish its context and meaning. The first part of the programme is not invalidated by the second but informs it at the deepest level and helps form actions that mean something beyond what would have been possible without that earlier discourse.

Peter Checkland’s concept of a soft systems methodology helps us understand this process. The solution to real-world, wicked problems needs a range of frames to make sense and move

forward. The enforced delay in rushing to a solution allows contradiction and challenge to emerge. Each frame offers a model to compare potentially conflicting perspectives, and eventually a relevant learning system and model emerges. (Checkland, 1999 A55).

Finally, there is a process of formal sense-checking the dissertation. Students are asked to share their work in progress, act as critical readers for each other, and set completion targets in each of the key research and writing stages. Some of this assistance is overt and tangible, but much else is intangible and emergent, altering and mutating according to the moment of need.

The cohorts also have a role here. They offer formal support. One cohort recently convened online every Thursday at 10.00 eastern standard time to share what had been accomplished in a week and encourage those that were struggling. Not everyone attended every week, but generally the weekly sessions were well supported. This constant drip feed of contact helped many through to the final dissertation submission.

The online, taught and (now compulsory) master's course is part of this alignment process. It structures the delivery of a research question and a literature review. The aim is that the content of the master's thesis can be dropped into the first chapters of the doctoral dissertation and form a continuous, integrated part of the research process, or at the very least indicate a blind alley before too much time and effort is invested in that investigation.

Students are also required to convene in Philadelphia (or online) two or three times during the dissertation block to meet with their chair and share progress and challenges. The whole research element is clearly surfaced and made visible (and therefore accountable to the programme as a

whole). This allows a collective process to emerge in as far as this is possible. The research forms a significant element of the collective body of research generated by the programme, not a single, lone artefact. The reference to a growing body of knowledge generated by past students is a conscious reference point, and the best graduates are invited back during each block to share their research and explain how it has impacted their practice.

The alumni group as a community of practice

The transmission of information to the network about who has successfully defended their dissertation is usually left to the alumni network as they formally welcome in their latest member. There is an established process to mark the transition from being a member of the learning community, to a member of the alumni community. This hundred-plus group is very active. It welcomes each newly arrived graduate and organises a series of events for members each year. It is now a powerful network of influential people in top roles. Many jobs or work opportunities have emerged from recommendations emanating from this group. It is also a network of expertise and support. There is rarely any issue that is shared with the network that cannot be resolved quickly. Few members would wrestle with a work challenge without seeking the advice and user experience of the network. In some sense, the group has evolved into a sustained community of practice with a shifting leadership, but a continuing commitment to driving forward the scholar practitioner values. It is a powerful network of ‘embedded change agents’ (Lionakis, 2021).

Etienne Wenger uses the concept of communities of practice to define a kind of knowledge borne of collective ownership, rather than individual private ownership. And this group would appear to fit Wenger’s definition. He talks about ‘knowing...[as] an active participation in complex social learning systems’ (2008) and defines communities of practice as: ‘the basic building blocks of

a social learning system because they are the social “containers” of the competences that make up such a system’ (2000).

The concept is very well established now and has remained constant since Wenger’s first major work in 1998. Furthermore, the continuing presence of the CLO programme in the lives of most of its alumni would appear to match the three core elements that Wenger says define any community of practice: a collective idea of community that can hold its members accountable; mutual engagement despite geography or sector to establish norms; and a ‘shared repertoire of communal resources’ which can be used appropriately (Wenger, 1998).

Maintaining relevance

The curriculum was given a fundamental overhaul by Dr Annie McKee when she became Programme Director in 2012. I worked closely with her to pull the programme apart and reassembled it block by block. In addition, four critical changes were implemented. The first was a conscious decision by McKee to increase diversity, first of the student group and later of the academic faculty. This is discussed above. The result was a far richer learning environment that made the student community an integral part of discourse and enabled the surfacing of deeper challenges during discussion.

Second, she demanded the continuous presence of the Academic Directors as facilitators throughout the week-long campus blocks. This created some tension by raising the level of debate, and at other times calmed conflict by mediation and adding balance. The ebb and flow of insight washes from faculty to student group to facilitator and back. This creates restlessness and a certain level of discomfort. The security of meaning and clarity is deliberately withheld for as long as

possible to allow dissonance, open debate and, eventually, a higher level of insight. To maintain this tension, clear rules of group behaviour are established before each block and emerge from a group commitment, which includes the new students, and are not imposed or handed down as a list.

The third was McKee's decision to make the dissertation block a more collective process, as discussed above. The creation of the dissertation was set out in stages. It went from initial exploration, establishment of a research question, conducting a literature review, and gathering data, to presenting the initial methodology and outline of the dissertation, before writing up the research. The aim was to be clear on the key stages and allocate appropriate time to them to suggest a lock-step timetable. There was a collective responsibility to fulfil that agenda, with a raft of support offered to anyone struggling.

The fourth was the establishment of a more coherent academic direction for each block. An Academic Co-Director from the University of Pennsylvania was appointed, alongside a practice professor from outside the university but inside the habitus – this was usually me. The building and shaping of each block relied on an interplay between these two members of faculty each offering a different perspective. This enabled a clear focus on practice and its mediation through research. They were never allowed to drift apart but also never allowed to be entirely resolved. This meant the movement from certainty to complexity mirrored the evolving ambiguity of the external environment.

Transforming learning

There are echoes in this process of Jack Mezirow's concept of transformative learning (1991; 2003). He defines transformative learning as: 'learning that transforms problematic frames of

references – sets of fixed assumptions and expectations...to make them more inclusive, discriminating, open, reflective and emotionally able to change' (2003: 58).

The concept incorporates a distinction between instrumental and communicative learning. This is a distinction that Mezirow takes from Jürgen Habermas (1987) and is discussed above. Instrumental learning is about controlling and improving the environment. Much work in corporate learning and development is instrumental; it focuses on March's exploitation model (1991). The aim is to make existing processes more efficient which leads to increased productivity and profitability. Many programmes are operational in nature; helping organisations get better at the day-to-day. Their aim is the kind of transformation that emerges from increased efficiency and effectiveness. There is no aspiration to question the premise or the logic of the operation itself. This is also Checkland's hard systems thinking, and it embraces Deming's concept of process improvement, total quality management, and error elimination (1982).

Communicative learning, on the other hand, requires an awareness-raising process. You need to become 'aware of the assumptions, intentions and qualification of the person communicating' (Mezirow, 2003: 59). This takes you from the realm of hard systems thinking (instrumental learning) where reality is external to the process, into the realm of complexity, where the very means of understanding the system, is an integrated part of its meaning. It demands the assessment of rightness, appropriateness, and authenticity rather than a simple binary conclusion of truth or not truth. Again, Habermas (1987) is illuminating here.

In a sense, context is inserted into the argument. Truth is contextual; reality is made up of perceptions or specific frames of reference in the manner argued by Roger Martin (2009). It is about standing apart from those assumptions and seeing them as metaphors or images and therefore being

able to understand their limitations. This points the way to a new generative learning which is transcendent and therefore allows the possibility of transformation.

The conclusion, if we follow Mezirow's logic, is that instrumental learning and an operational mindset – where the problem is 'out there' – always accepts context as immutable 'truth'. Therefore, the transformation of either the individual or the organisation, except in an operational or efficiency sense, is elusive. If the corporate learning mindset remains operational, then the function will not deliver in an age of uncertainty and disruption. The function will not be able to work through complexity and contradiction, it will neither help in the rebuilding or re-engineering of process, nor in redefining meaning and purpose for the organisation. In other words, it cannot stand outside the four walls of the company and imagine how the building could be redesigned, but it is able to redecorate the inside.

Mezirow puts an emphasis on 'critical reflection and critical self-reflection' (2003: 60) to get beyond simple assumptions, and leap into new meaning and new possibilities. This is delivered at a meta-level in the CLO curriculum. This ought to be a fundamental requirement for any learning function or learning programme. They both should be capable of delivering new capability and illuminate new possibilities. This involves challenge, dissonance, and discomfort.

In many ways, the PennCLO programme has deliberately embraced these processes. It has built critical self-reflection into the mix. There is now an explicit aim to develop in the students 'a perspective about their own perspective' (Mezirow, 2003) and thereby open them to the possibility of self-transformation, role transformation and ultimately organisational transformation. The aim is to build a metacognitive insight into that process (Mezirow, 2003: 61). This is possible through the

instrumental engagement in debate, and the provision of a unique ‘permit to work’ credential, in the symbolic status of the doctorate.

Conclusions

The CLO programme has attempted to remain true to itself and true to its heritage. That early vision to ‘shake things up’ has been more finely realised through a conscious focus on discourse, rather than content, and a deepening respect for the potential challenge offered by a diverse and actively engaged student group in that mix. The programme is co-created, sometimes quite literally, and therefore can remake and remodel itself as the student group shifts and flows forward, reflecting the changing external environment. For example, is it is branded as the CLO programme, but draws students from a much wider pool of organisational development, talent development and performance management professionals. In doing that, they reflect the evolution of the people context inside organisations.

This nature of learning and epistemic process in the programme takes the participants a long way from what a conventional doctoral programme might be expected to deliver in an Ivy League institution. But it remains anchored to the regulations that determine what is ultimately possible. Indeed, the institution itself is both the enabler and the limiting factor in the extended life of the programme. It gives permission and freedom to innovate, but always imposes limitations on the fundamental tenets of that permission.

Tension is therefore an implicit outcome of the process. Tension between controlling and liberating the students; tension between the formal expectations and the implicit permissions of the university; tension between mimicking the corporate world and redefining it; and finally, the tension

that exists between the need to define clear, explicit outcomes, and the absolute requirement to let meaning emerge.

It is an imperfect process with an in-built contradiction at its very heart. The students have a rightful expectation that they will leave the programme with the qualification they entered the university to obtain. Yet the programme itself has an obligation to prepare them for the uncertainty and ambiguity of an external environment that needs a new generation of professionals that can transform the people proposition in organisations, and in so doing remake the organisations themselves. It is an interesting and stimulating challenge.

Chapter 4

Public Works: Workplace Learning

Intelligence is traditionally viewed as the ability to think and learn. Yet in a turbulent world there is another set of cognitive skills that might matter more: the ability to rethink and unlearn. (Adam Grant, *Think Again* Prologue)

The context for Workplace Learning:

What is a learning culture?

I wanted to write about learning culture because it seemed the right time to step away from the detail of learning in organisations and look more holistically at how learning impacts, and is impacted by, day-to-day work. To review this process, I used Nicolini's metaphor of 'zooming' to help clarify the process I applied to make sense of what was going on inside organisations. Zooming out of corporate learning was necessary to get a perspective on the effect of learning across both productivity and engagement in organisations. This would have been almost impossible if I had remained embedded in and blinkered by the flow of organisational delivery of corporate learning. On the other hand, the detail of process and decision making that led to a different kind of learning could only be revealed by zooming into the detail. Each perspective needed a different frame to make sense, and both equally reflected on practice (Nicolini, 2009).

If I was, in the words of Vida Midgelow (2012) 'to have a conversation with my practice', I had to have a framework within which to engage. Midgelow did this by writing emails from herself to her practice (*Dear Practice*, 2012). I did it as an extended conversation between the bigger flows of organisational life and the learning and development framework that had been established. I

wanted to explore the symbiotic relationship between organisational learning and individual learning illuminated by the frame Argyris used in his work, most notably in *On Organizational Learning* (1992). This revealed a fundamental, and often hidden, critical inter-relationship in the way that meaning was defined and elaborated. This took me into an exploration of purpose and outcome as expressed by Mezirow:

It is this logic that suggests that frames of references should be considered more functional or more ideal when they are more inclusive, differentiating, critically reflective, open to other points of view, and integrative of experience. These are enabling conditions extrapolated from the universal principles of discourse. (1998: 188)

However, the insight that the nature of the organisation was impacted by the different perceptions of the role of learning, and the nature of learning was impacted by the perception of the role of the organisation – and this relationship changed constantly – was instrumental in helping me understand how a learning culture reflected the organisation, whilst at the same time changing it. Therefore, a focus only on what learning was expected to deliver outside the organisational context missed the point entirely.

The book initiated a journey of understanding inside that complex intermeshing of organisational culture and learning culture. This tension revealed how the hidden purpose and aspirations of an organisation impact, almost invisibly, the individuals who worked there, and determine what they perceive as their value and the nature of their contribution to that organisation's success. One huge differentiator was whether learning was perceived as activity embedded in work, or external and in addition to work. Harold Jarche's contention that learning was work, and work was learning appeared to be firmly conditioned, not by the nature of work, but by the nature of the organisation (Jarche, 2015, is just one of many references).

There were a few gaps and absences that it was important to explore. They hovered around perception and reputation, as well as status and agency for the learning function. How did those gaps and tensions impact what was delivered? My initial insight as I began the process of exploration and enquiry was that, in many instances, a huge gap existed between what the organisation needed to optimise productivity and speed up problem solving, and what an inwardly focused learning and development function aspired to deliver. Making that learning more polished, interactive or learner-centred would enhance the learning experience but do nothing to make the outcomes more relevant.

Mezirow's description of the 'enabling conditions' that determined the role of learning, if any kind of transformative learning was to occur, echoes Argyris's double loop learning as well as Wenger's description of communities of practice as 'mutual engagement around uncertainty' (Wenger, 2021). Without attempting to embrace complexity, the big issues are never challenged. This creates a thin carapace of certainty and a know-it-all culture; whereas acknowledging problems that have no obvious or clear solution requires a learn-it-all culture. To let a solution grow inductively, requires a different attitude and conceptual framework about learning. Trying to make sense, requires a completely different approach than delivering certainty (Mezirow, 2003).

If you apply James March's (1991) logic around the exploration and exploitation dichotomy inside organisations, it becomes clear that delivering programmes of learning to solve single loop problems only partially helps increase productivity in exploitation mode because the process fails to establish what is really going on, and what the deep challenges are. Allowing solutions to emerge inductively by enquiry and shared ownership of the problem, will help exploitation, as well as paving the way for exploration. In consequence, March's dichotomy is not around the gap between exploitation and exploration but in establishing the common frameworks to deal with both.

One of the book's second edition (Paine, 2021) case studies is on the large pharmaceutical company, Novartis. It shows how the company is attempting to build a curiosity mindset to surface more holistic solutions to its own challenges amidst rapid change. Novartis starts with the aspiration of building healthy communities around the world, not forwards from the development and marketing of a particular new drug. That means that the traditional way things were done is overridden by more significant social and ethical concerns. By building curiosity into a more autonomous environment, the company hoped to not simply continue the status quo, but make significant changes that reinforce its purpose.

Essentially the company wanted to challenge their focus on operational learning, which was designed to do more of the same, but better; in favour of an emphasis on generative learning or enabling skills. These encourage colleagues to adopt new ways of working, seek diverse views when problem solving, and challenge hidden assumptions.

This dichotomy, between operational learning and generative learning, is explored by Pillans (2017) in a Community Research Forum report on organisational learning. She links sustainable performance and increased organisational agility to the empowerment of the workforce and their ability to work things out, rather than wait to be told what to do. This, she argues, requires an increased (but not exclusive) focus on generative skill development.

In Argyris's taxonomy, you could argue, that learning which stifled or ignored curiosity ended up as single loop learning. There was no encouragement to look beyond the obvious superficial problem or challenge 'the way we do things around here'. All dysfunctionalities lurked 'out there' and were never traced back to a system, a set of beliefs and assumptions, or a structure. Senge (1990) would have noted this as an absence of systems thinking. Senge was correct to

postulate a direct link between systems thinking and the conditions that lead to a learning organisation.

The more I looked, the more disappointed I became at the lack of real innovation in many learning operations in organisations. I realised that I and countless others had missed the opportunity to transform their respective organisations through learning. If you made no attempt to understand how the organisation, at a profound level, was part of the problem rather than the container for the problem, it was very difficult to do more than tinker around the margins of productivity and effectiveness. Changing the status quo and redefining the values that underpinned it, was another matter entirely. Argyris saw this in the 1990s when he bluntly dismissed single loop learning as a pathway to organisational (as opposed to individual) learning: ‘discovering problems and inventing solutions are necessary, but not sufficient conditions, for organisational learning’ (Argyris, 1992: 9).

In effect, when learning operations focused only on the three Cs of compliance, competence and content, three very important Cs were missed entirely: culture, connection and complexity. You could clearly define the first set, but the second was more problematic and holistic. The *Workplace Learning* book’s conclusions revealed that there was limited long-term impact if you developed competence without a framework for self-development and collective problem solving; or solidified the culture of compliance in the absence of a broader purpose and meaning; and focused on delivering and developing content without strong co-creation and debate, about what was needed and in what form. This pointed towards a bigger agenda that shook up assumptions around traditional learning delivery.

This was the genus of *Workplace Learning*, and the aim was to help the corporate learning community design and build more effective organisations with an engaged and empowered

workforce that could contribute to the continuing success of the organisation. It was not about better learning infrastructure or a bigger course catalogue. This realisation forced me to take a more challenging and holistic journey to the one I had been used to. I was crossing swim lanes and got a buffeting in the process. The very act of zooming outside the L&D function to look at complex organisational flows and understand what they implied, revealed how a narrowly focused internal L&D team could only marginally improve learning and skills, but would never get to the heart of how learning could transform organisations.

For the first time, I had a visceral sense of the habitus which Bourdieu had defined in his 1977 *Outline of a Theory of Practice*. As Susen (2011: 2) reflects: ‘The *habitus* constitutes a dispositionally structured apparatus of perception, appreciation, and action. Its main function is to allow social actors to confront the field-specific imperatives thrown at them in a field-divided world.’

I realised that a singular focus on the field avoided any conscious engagement with the habitus. I, therefore, had to ask different questions that engaged with the habitus to transform the field.

How does a learning culture function?

My research for the book homed in on how a learning culture could transform organisations. However, I struggled to capture that process as a single definable model because context got in the way. I, therefore, focused on describing the outcomes, the conditions, and the consequences. Amongst the key factors that determined a learning culture, in my model, was the nature of learning itself. A learning culture needed to produce and be produced by self-determined learners. Therefore,

the idea of heutagogy (Hase and Kenyon, 2013) was a condition and consequence. I had to distinguish this from the concept of self-directed learning, as heutagogy was not just concerned with when and how but invoked the idea that the learner had control of everything. It presupposed a lifelong learning mindset driven by endemic curiosity.

The organisational brain

Argyris's (1992) and Mant's (1997) viewpoint strongly reinforces the idea that organisations are organic and can only evolve by taking intellectual sustenance from outside to grow in a way that allows it to overcome both challenges in its internal and external environment. This idea became, for me, an embodied function of a learning culture. New ideas had to be brought in from outside and distributed around the heart of the organisation where they could be shared rapidly and would lead to new understandings followed by necessary action. This required a strong sense of community and mutual respect horizontally across the cognate areas, not simply within them. This in turn required a clear commitment to speaking out without fear and generating honest debate. This required a climate of psychological safety. The process was not knowledge or ideas for their own sake but to deal with urgent and complex problems. Therefore, the process of disruption and stabilisation were one and the same and occurred in a continuous cycle of learning and re-learning.

As Amy Edmondson pointed out so forcibly in her 2018 book, *The Fearless Organization*, the absence of fear was a necessary component for innovation. New insights would only be rapidly shared if there was mutual trust and respect. People in organisations sought protection in cognate groups or specialist teams. But to develop communities that reached across the organisation, an additional level of trust and respect had to be engineered. The perceived value of shared learning had to transcend structure, function, and, to some extent, hierarchy.

This multidisciplinary building of insight could, in turn, permit fine adjustments of key organisational levers that would enable the organisation to maintain contact with its environment. This could improve both exploration as well as exploitation. Rather like an advanced suspension system which allows a vehicle to maintain contact with the road regardless of how bumpy the terrain becomes, a sophisticated process of understanding and reacting to the external environment could keep the organisation in contact with its field regardless of the disturbances. Diversity was a source of insight, rather than a problem to be homogenised and fixed.

The metaphor I feel amplifies this idea is built around the concept of an organisational brain. What was required for accurate interpretation and speed of action was not a group of smart, isolated individuals (my culture of learning), but rather a kind of collective intelligence based on connections and debate (my learning culture). I was sure that organisational learning was built in the connections between people, not simply locked into individual expertise. A learning culture, therefore, existed in the spaces between people; the more densely packed the connections, the more the collective understanding and the faster the processing of new information. Organisation learning was a key constituent of organisational resilience.

These thoughts triggered a memory from 1995 when I was luckily enough to be invited to interview Bill Gates. I had asked him what he saw as his main role as Microsoft's then CEO. He thought for a few seconds and then replied that Microsoft employed 'a tonne of super-smart people', and smart people are convinced their view is the only one worth considering. His role, he went on to explain, was simply to ensure that the 'one plus one plus one' of smart people added up to more than three. In reflecting on the provenance of *Workplace Learning*, I now understood precisely what he

was talking about! Ironically, it took a new Microsoft CEO, Satya Nadella, for those words to be put into dramatic effect at Microsoft. And the key to it all turned out to be a learning culture.

In my first book, *The Learning Challenge*, I had talked about what neuroscience had taught us about the human brain and learning (Paine, 2014: 137-154). My focus was on delivering the conditions that could enable better learning by individuals. An entirely different frame emerged when I switched from individual to organisational learning and looked at what Wenger called ‘the practice of connection’ (2008: 113).

There are about 100 billion neurons in the human brain and each neuron is capable of making more than 1,000 connections. Those connections are the seat of human knowledge and intelligence. It is the density of those connections that builds cognition (Herculano-Houzel: 2012). And, indeed, by extension, not all brains are the same. The scaling up of brain mass does not lead to an equal scaling of neuron density (Herculano-Houzel: 2012) and organisational brains are not all built in the same way. The difference is that organisational knowledge, as opposed to individual expertise, is defined by cultural and structural factors not just by the smartness of the employees. And for a learning organisation, just like a human brain, it is the complexity and density of the connections that matter most.

Knowledge can lie in the space between people, and what matters is not what one person knows but the connections that qualify and amplify that knowledge and make it available when it is needed and when problems have to be worked out. The organisational whole can be far greater than the sum of its individual employees when the connections are abundant. A learning culture is not just about building a continuous process of individual learning, that is a culture of learning; but ensuring the quality and frequency of the connections between individuals. This is based on a rigorous seeking

out of insight and a willingness to share. In that climate, the learning is triggered by curiosity not compulsion, and the focus is not acquiring more expertise but solving organisational problems and challenges exactly as Wenger describes: “mutual engagement around uncertainty” (Wenger 2021). Plugging into the organisational brain builds on what everyone knows, not what a small group knows, and connecting everyone with expertise wherever it happens to reside.

I followed through Argyris’s logic in seeing that individual learning was necessary but not sufficient to solve complex problems. There is a significant dichotomy between an individual’s learning in an organisation, and organisational learning. The complexity and density of organisational learning is directly related to the number of connections that an individual may have, and how easy it is to exploit those connections quickly to check, plan and problem-solve. Organisational learning is the way the organisation responds to turbulence, gets things done, and realigns.

Clearly, in my model, individual learning feeds into organisational learning: you cannot have high levels of organisational learning, but poorly skilled and equipped staff. Yet when you have an organisation full of confident learners who are empowered to learn, but also willing to work together on challenges and in the process of doing that share that learning, you enter another dimension of capability. This is not individual capability, but organisational capability. This was a powerful insight that linked learning to effective action.

Firing and wiring

The full implications, however, only appeared when I zoomed out from that point to focus on the intricate patterns of organisational connection. I realised that at the heart of a learning culture had

to be a learning organisation. And it was the connections the organisational synapses made to each other that created the complexity of organisational ‘consciousness’, not the individual neurons. As Donald Hebb (1949) stated before he had any empirical evidence that this was valid, ‘cells that fire together wire together’. Memory is based on complex neural pathways being formed and maintained. This is not a one-off instance, unless it is an extremely powerful event, but the pathways are created by the repeated firing of those neurons until they form links and strong connections. As Julija Krupic explained in an article for *Science*:

Thus, neural connection must show some sort of plasticity – i.e., an ability to be modified based on the mutual firing patterns of interconnected neurons – in order to form memories and associations. Indeed, it has been shown that brief (hundreds of milliseconds) stimulations of interconnected neurons significantly improve signal transmission between the two, a phenomenon known as long-term potentiation (LTP). (2017: 974)

In the same way, organisational plasticity aids organisational memory and intelligence, and builds long-term potential. Organisations, too, had to pay attention to the ‘mutual firing patterns of interconnected neurons’ to be modified by different insight and different circumstances. It is the very process of sharing knowledge and expertise that creates the coherence and resilience in organisations and their workforces, and this appeared to be borne out by the case studies I explored. It also allows for organisational forgetting. Just as unused neural pathways in the brain gradually fade, organisational insight can shift and morph depending on the strength of the links between the nodes. New people, new ideas, new environment and new challenges allow the organisation to move on and evolve.

However, if you look at traditional organisational learning, there is very little focus or concentration on building connections. It is predicated on the development of individual competence. The network building is seen as a happy by-product. In some ways, the advent of newer learning models, such as eLearning, reinforced the focus on solitary learning undertaken by individuals,

largely in isolation. The traditional learning community, which is a batch processing craft model, is supplanted by individual mould stamping: a mass production of learning. Here, success is judged by massification: the speed and efficiency of individual completions often being the only metric of success. If you take this to its logical extreme, it pushes people away from each other rather than connects them, and it leads to competition between individuals or groups and a lack of concern for others or the organisation's success. Interesting research in 2018 indicated just how unwilling large numbers of workers are to either ask for or offer help in the workflow. (Bolino and Thompson 2018)

Many organisations are still predicated on individuals beating other individuals, and teams being rewarded for doing better than other teams. A learning organisation has a different emphasis. In a learning organisation, the focus and the reward are linked to development and rapidly sharing knowledge and insight, and the collective wellbeing of the organisation. Teams that share rapidly gain greater recognition (and reward) than teams that hoard their knowledge. And to paraphrase Donald Hebb (1949), teams that fire together with other teams, wire together. Access to help is readily offered, and managers gain kudos not by their own performance but by how much progress, connection and development their team demonstrates. Therefore, a learning culture, by design, spawns an organisation that is greater than the sum of the smart people or smart teams who work there.

Chris Argyris and the origins of organisational learning

The primacy of organisational learning was an essential conclusion drawn by Chris Argyris when he first started working on knowledge transfer in organisations during the 1980s. That makes his work a vital frame for understanding the processes in my books. Argyris's focus was far more on the way organisations were structured, and whether that structure inhibited or enhanced problem

solving and productivity, than on individual learning excellence and skills development as a formal process inside organisations. He has very little to say about that. His focus was on the power and the contribution of social learning before it had even been named (Argyris, 1992). Argyris preferred to focus on the outputs of organisational learning rather than the detail of the process. He claimed that organisational learning manifested itself in:

organisational adaptability, flexibility, avoidance of stability traps, propensity to experiment, readiness to rethink means and ends, enquiry orientation, realisation of human potential for learning in the service of organisational purposes, and creation of organisational settings as contexts for human development. (Argyris, 1992: 1)

This is a very rich taxonomy, and it reflects individual learning in context, rather than as a thing in itself, and subjected to the over-arching needs of the organisation. It represents a rich checklist for measuring the impact of a learning culture. Argyris realised that learning which served ‘organisational purposes’ required connections across the organisation as well as within conventional hierarchical structures. He called this phenomenon ‘boundary spanning’: learning across organisational silos and structures. He contrasts organisations that prioritise individuals rather than ‘paying attention to the development of the company’ (1992: 104). This is axiomatic for a learning culture.

Argyris identified the key players who could inaugurate and maintain these learning flows. They were neither the head of organisational development nor the learning leader. The key to success was in the hands of the team manager. The manager’s role and attitude were critically important. The implicit permissions the manager gave could either transform and amplify the web of connections inside the organisation or terminate them. A learning organisation was the manifestation of these connections which were fundamental to the very concept of a learning culture. Again, the insight reverberated back to my second book on leadership (Paine, 2017) where I noted the difference between ‘vanilla’ leadership development without context, and leadership development that

embodied a specific role and mindset for the leader, in service to the wider organisational aspirations.

The impact of boundary spanning could be amplified further, if the boundaries were extended beyond the organisation and into the customer value chains to include suppliers, the extended workforce and aligned organisations. This created a new employee ecosystem that reached right out into the community for better insight and understanding. This is explored in a recent MIT/Deloitte report (Altman, 2021). The authors define a workforce ecosystem as:

a structure focused on value creation for an organisation that consists of complementarities and interdependencies. This structure encompasses actors, from within the organisation and beyond, working to pursue both individual and collective goals. (Altman, 2021: 1)

Their definition plugs the idea right back into the power of increasing complementarities and interdependencies. Achieving that state is non-trivial. It challenges the values, the purpose and the boundaries of many organisations, and therefore demands a fundamental realignment around how an organisation thinks of itself and the parameters of its influence and its partners. This, in turn, requires a re-examination of the value an employer places on individual staff, and how much their network of connections is factored into the picture. This is because the stronger the network, the more intense the learning.

The antecedents: Adult development and organisational development – Robert Kegan

In his latest book, *An Everyone Culture* (2016), Robert Kegan shifts from a focus on individual adult growth to the role of organisations and how they can support or destroy aspiration and growth. He argues that democratic and human-centred organisations are fundamental to adult growth. He calls these ‘deliberately developmental organizations’. Reflecting on Kegan’s

conclusions and his dramatic shift from individual psychology to organisational sociology led me to trace these ideas to where they might have originated. I explored the thinking in the decades after the Second World War from the 1950s to the 1980s in Europe and the USA. There was a movement focusing on the quality of work, and the wellbeing of the worker, and ideas for increasing industrial democracy by establishing works councils, for example.

In post-war German reconstruction, the ideas were built into the new industries and industrial structures, and are still in place today (Matraves, 1997). The argument that a healthier and more democratic organisational culture could improve productivity and safety at work emerged and was extended and enriched in the 1970s by a plethora of psychological research into collective participation and problem solving in the workplace. Obholzer et al (1994) tracked the intellectual web linking the London-based Tavistock Institute with a network of organisations and individuals dissatisfied with a Taylorian model of scientific management.

Indeed, in her 2018 book *Accounting for Slavery*, Harvard academic Caitlin Rosenthal traces the origins of Taylor's human capital processing and accounting back to the 19th-century slavery plantations in the southern United States. Maximising efficiency took the human being out of the equation: he or she was simply another kind of machine.

The impetus for these changes in viewpoint were built by evolution in psychology thinking, based on the work of individuals including Fred Emery, Einar Thorsrud, David Herbert and, above all, Kurt Lewin (Obholzer et al, 1994). This became a global movement that has a second and perhaps more powerful lease of life now as we consider wellness and wellbeing important components in workplace design.

The emergent view was that an organisation, far from being a mechanical construction, was much more akin to a living organism that could only survive ‘by exchanging materials with its environment’. That is, by being an ‘open system’ (Obholzer, 1994: 37). That idea was captured by many, notably Alistair Mant (1997) and Bob Garratt (1996) when they talked about the concept of organisations as organic systems.

The metaphor they used described organisations as frogs rather than bicycles. A bicycle, it was argued, could be taken apart and put back together again. If you cleaned, oiled and tinkered with the parts it was actually better. On the other hand, when you attempted to take a frog apart, it had to be done with delicacy, skill and expertise just to ensure it survived. And even then it would need time to recover and repair. The likely outcome of drastic surgery was the destruction of the organism (Mant, 1997). The metaphor was used, in part, as an extended attack on business process re-engineering (BPR) and its concept of disassembling organisations and putting them back together to make them more efficient. This was an idea that emerged and died during that decade. See Grover et al (1995) for a discussion of the emerging anxieties around BPR and its lack of implementation success.

That concept of an organisation as a complex cellular organism capable of growth and the absorption of new information from its immediate environment is fundamental to the very idea of organisational learning. I realised that I was not just talking about learning in organisations but touching on the far more complex concept of the purpose of work and the nature of the organisation itself. Learning culture was both a reflection of, and a window into, far bigger concepts and ideas. My book, although I did not realise it at the time, was not a parting shot, but the beginning of a far more intricate journey into the complexities of organisational life and purpose.

Judgment models: Tetlock, Grant and Gherardi

Tackling the question of what a learning culture was from an organisation-wide perspective helped clarify why it was far more complex than the mere quantum of learning. The elements that helped to define the nature of a learning culture were as much about human values, such as trust and empowerment, as the narrow process of better learning management, course catalogues and access. I was concerned and committed to rescuing a powerful idea from drowning in a sea of oversimplification and misinterpretation. The term had begun to be used so often, and in so many different contexts, it had ceased to have specific meaning and had become merely some kind of ‘badge of honour’ that was gained only in the telling. To have a learning culture, you merely had to claim you had one. It became a synonym for adding a corporate university or building an academy structure. It became an indicator of increased investment in learning, or the investment in and the deployment of new learning technologies. The reflection required in this chapter has convinced me that the bedrock of a learning culture is worth identifying and defending.

I was particularly anxious that the conflation of the investment in a learning experience platform with the emergence of a learning culture was rebutted. The myth, perpetrated by vendors, that technology was the solution ran against all the evidence I had assembled. Using technology to paper over the cracks in organisational culture seemed to fail at every turn. All the examples above could act as perfectly justifiable indicators of the intent to build a learning culture, but none was even close to delivering that essential, holistic model that linked individual insight and competence with collective wisdom and problem solving, and a focus on making work more meaningful and

organisations better equipped to cope with disruption and volatility. These ideas had to be at the heart of a learning culture and those linkages had to be defended.

Building learning organisations related to sustaining new models of mind. Social scientist Phil Tetlock defined three social-functionalist frameworks commonly used for making judgments (2002). These dominant models of mind are: ‘preacher’ (where you believe you have the truth and must convince others using passion and emotion); ‘prosecutor’ (where you believe you will win the debate using powerful arguments systematically built up to prove your case); and ‘politician’ (where you believe you will convince others by engaging with them emotionally to believe your point of view).

All three approaches are about ignoring contradictory evidence that might challenge the view being advocated. They are, in one way or another, designed to stifle debate and drive acceptance of the dominant ideology without question. Each approach is used to convince or bully others into the acceptance of a singular point of view.

A learning culture, on the other hand, celebrates debate and contradiction. It accepts that not knowing can be as valuable a contribution as knowing, to arrive at more complex understanding that leads to better decisions. It is about quietly examining the evidence and taking measured decisions that emerge from diverse viewpoints across the whole organisation and asking great and probing questions. This is what Adam Grant proffers as a more appropriate solution to complexity in his new book, *Think Again* (2021). He calls it the scientific method.

Grant contrasts models of mind which are about convincing, with a more nuanced scientific perspective. In his view, to come to new insight you must think like a scientist. In other words, focus

on reasons why you might be wrong, question your assumptions, and gather evidence that proves or disproves your point. You need to be willing to relinquish your point of view if the evidence points in another direction. That is the essence of the culture of a learning organisation. And why learning organisations might be the most likely to survive in the next decades. It is about embracing contraction and welcoming challenge, being prepared to set aside cherished views, and celebrate a diversity of perspective to get to more resilient solutions and adjust faster to a volatile environment. It is exactly what Silvia Gherardi is getting at when she talks of seeking out views across the whole organisation: ‘In fact, the engagement of practitioners, their experience knowledge and their care for what they do may enhance workplace resilience’ (2018(a): 11).

Gherardi describes a radically different way of knowing inside organisations that is inclusive and challenging to implement. A learning culture is not about the accumulation of knowledge, it is about the sharing of insight and organisational know-how to take effective action. It is also an alternative definition of double loop learning. Gherardi says: ‘Actionable knowledge – for changing practices – emerges when all actors agree to question the issues that are often taken for granted and are ready to address the contradictions and conflicts that might emerge in the process’ (2018(a): 20).

A learning culture is about the way we organise work and define its purpose. That impacts every corner of the organisation. This is profoundly different, in every dimension, from installing a learning experience platform, or increasing the quantum of learning offered to individuals.

Conclusions

In this chapter I have tried to examine the thinking that led to *Workplace Learning*. The use of a few critical frames allowed an exploration of the context in which the book was written. The

frames illuminated the journey to the origin of the book and helped me explore, critically, my earlier thinking.

This exploration also led me along a richer intellectual pathway where the broader historical origins of the ideas that make up a learning culture began. The ideas that scaffold the book have their roots in 20th-century philosophy, psychology, and sociology, and concentrate around the exploration and justification for new forms of workplace organisation, and new ideas about individual agency and meaning at work. This critical reflection process enabled me to tap into an artery of ideas that ultimately concerned how we make meaning in our lives, and how we build comfortable constructs of reality to protect that meaning. The goal of the book was to encourage the development of human potential at the service of organisations. This chapter shows how powerful an idea that still is, and why it appears so difficult to orchestrate.

Chapter 5

Public Works: Building Leadership Development Programmes

The context for leadership development

The individual case is always an indicator of a broader question. (*The Young Pope*, (2016) Episode 4)

Introduction

I wrote my book on leadership development out of an enormous sense of frustration. I had questions but not answers, and I wanted to explore the issues and the domain to come up with practical solutions, not a series of digressions about what was wrong with leadership development. If current players delivering leadership development were in exploitation mode, I wanted to shift to exploration and discovery in James March's sense of the terms (1991). Although the domain was familiar to me, like much exploration, I had only the vaguest sense of where this journey might lead. The core motive was to attempt to understand what made some leadership development transformational, whereas other – sometimes heralded – development processes left nothing of enduring value, and no noticeable change across the organisation.

I was not alone in this quest and was guided by two hugely influential publications – Barbara Kellerman's 2012 book, *The End of Leadership*, and Jeffrey Pfeffer's *Leadership BS* which was published in 2015. Their tone was of shock, anger and frustration at the failure of so much investment in leadership development to make so little difference to the quality of leadership that played out in toxic environments in so many organisations which their investment in leadership development did nothing to change. Despite an investment of around \$50bn per year (Pfeffer, 2015) to improve leadership, its abject failure was apparent everywhere.

The issue I had with both books was their reluctance to get beyond a cogent analysis of all that was wrong. They did not answer the obvious question: if most leadership development was not working, what should we put in its place? I tried to answer that question, not by offering any kind of prescription but indicating, from my own research, what was more likely to work and what was doomed to low or marginal impact and, therefore, failure to change much, if anything.

In the first place there was an apparent lack of connection between my own values around what constitutes good leadership, namely fairness, enablement and empowerment, mentorship, and team performance; and what is rewarded in many organisations – a focus on individual performance, a lack of concern for the team, poor behaviour, results at any cost, and so on (Pfeffer, 2015) (McKee, 2017). Furthermore, leadership development seemed to pay scant attention to building engagement or happiness at work because the emphasis was on getting things done more efficiently (Aon Hewitt, 2013). The focus also appeared to be on the process rather than the outcome. Permanent behaviour change was rarely a committed outcome and the failure to deliver permanent behaviour change appeared not to be an issue.

I was also struck by the massive and almost unbridgeable gap between the theory of leadership with its complex development models, and what happened in practice, day in and day out, inside organisations. There, Taylorism, (1919) with its focus on maximising return on labour with no concern for wellbeing, had barely given way to Douglas McGregor with its limited focus on self-actualisation (See Bennis and Schein 1996). In other words, whilst the theory had pressed on, the practice had barely shifted since the 1960s, and in some situations was locked in the 1890s. There was a clear misalignment between aspirational, ideal situations, and how leadership is experienced day-to-day at every level in most organisations. The attempt to insert a four-day course as a bridge

across that gap appeared to be more window dressing than substance. Kellerman summed this up: ‘Capricious, murderous, high-handed, corrupt, and evil leaders are effective and everywhere – except in the literature of business leadership’ (2004: 45).

Reviewing many programmes revealed an obsession with delivering content that exposed participants to complex models of leadership theory. These were rarely contextualised and, therefore, never got translated by participants into behaviours they could model, or into agendas for action that would make the workplace more purposeful and fulfilling for the people who worked there.

The output was designed to make leaders feel important, with no scaffolding to help confront the practical obstacles the participants would face when attempting to implement changed procedures and behaviours on their return. There was no fieldwork, in Nicolini’s sense of fieldwork, and as a consequence no one entered the flow of work in order to understand at a profound level what was at stake, and what was necessary to change (Nicolini, 2012).

It was as if an alternative reality bubble had been formed around the notion of leadership. Abstract models failed to confront reality. This was the opposite of Roger Martin’s concept of integrative thinking (2009). Telling people what to do without context had to fail, and helping people think about their own context, and their own role in this context, was fundamental but absent. Very rarely was the process either reflexive or reflective, and the outcomes were, consequently, a process of imitation without thought. This was a classic form single-loop learning. (Argyris, 1977)

Martin (2009: 1) cites books including Jack Welch’s account of his work at General Electric (GE), *Straight From the Gut* (2001), as promoting a lie. Even Welch changed his approach because the context changed. Martin’s words in a *Harvard Business Review* article resonate: ‘But this focus

on *what a leader does* is misplaced. That is because moves that work in one context often make little sense in another, even at the same company or within the experience of a single leader' (2007: 1).

Context and espoused values

Context was the key for Martin and at the centre of Nicolini's concept of practice and fieldwork (Nicolini, 2012). Most leadership development operated in a way that disregarded practice and ignored fieldwork. What happened in work at a profound level was not extracted from work or acknowledged to change day-to-day practice.

Nicolini's 2012 book, *Practice Theory, Work and Organization*, added a new dimension to my thinking. This resonated more when I looked at the earlier work of French sociologist, Pierre Bourdieu. His concept of habitus, which was defined as a 'sense of place...a sense of other's place' (Bourdieu, 1996; 2005) revealed the failure to engage with the idea of place, time, and context. If Nicolini's concept of 'field' defined the working out of a specific habitus, he was setting an important challenge: to reshape the field, not be controlled by it. This required a close and careful examination of practice that could only be revealed by fieldwork. The failure of leadership development was failure of understanding, based on a lack of any commitment to discover what was going on inside the organisation in favour of focus on the role the leader looked at from outside practice. In truth, nothing about leadership in organisations was abstract and theoretical, everything was contextual and epistemic.

If the field was unchallenged and practice was ignored, then no sense could be made of the environment and no underlying problems were acknowledged. If it was impossible to understand what was going on at a profound level beneath the superficial account of organisational success, then what was needed to fix problems in a specific organisation at a particular time was unclear. The

frames I had delineated for this critical reflection helped me understand that the absence of sense-making in favour of solutioning was not something trivial that needed just a tweak or two to the curriculum, but a profound failure to take a more holistic view where context was crucial, in order to expose the underlying scaffolding.

This process of reflection revealed both the strengths and the weaknesses of my book. The book has strengths, it is on to something important, but it only goes so far. There is one fundamental weakness: more complex issues about the nature of the organisation are not grappled with, and the critical conclusion – that when leadership development is decoupled from specific practice in organisations, action is superficial and ineffective – is missing. Leadership development should help leaders think, not simply be, in order that double loop learning can occur, and effective action can be orchestrated.

The book draws attention to a raft of disengaged, disconnected leadership development strategies that had failed to challenge or disrupt current practices whilst claiming to transform them. It also shares some models that work without drawing out what clearly links them: operating in context and based on an understanding of practice. Examining my writing on leadership through the frames cited in chapter two reinforced the need to look more deeply at leadership development, and demand more radical surgery. Essentially, much leadership development did not explore or attempt to understand what was going on inside organisational culture or surface the espoused, implicit values. The result was a focus on a single-loop response to challenges that left the underlying organisational system, where the critical problems lurked, unchallenged and unchanged. Leaders were extracted from those systems and were presented as part of the solution rather than part of the problem. Without fieldwork, the reality of the working environment was never allowed to challenge

the espoused narrative. No deep learning took place, in Gherardi's flow of experience, to challenge the orthodox narrative of leadership success (Gherardi, 2012).

The combination of all these elements was a portrayal of leadership as a single loop learning paradigm that failed to excavate any meaning beyond the surface level engagement or extract the learning that could be re-embedded into the organisation to redefine purpose and aspiration and illustrate the complex generative potential of leadership.

At the time of writing the book, I lacked the tools to surface the assumptions that controlled my narrative. This meant that fundamental assumptions beneath the organisational narrative were neither present nor interrogated. Apparent, explicit values of the organisation were never held to account by implicit behaviours, therefore the basic contradictions leading to failure of leadership development were never exposed.

Leadership development beliefs

Some of my assumptions about leadership development resonated with the later research I had undertaken on innovation in leadership development with 12 large European companies (EFMD, 2018). I was working with the staff in charge of leadership development, and they came to the research programme largely frustrated and recognising that the millions of euros spent on leadership development in those companies was not preparing their leaders to cope with the turbulence and uncertainty of the environments in which they were working. In fact, one senior member in charge of leadership development explained quietly, 'We could actually be making things worse.'

There was a collective assumption that much leadership development was not fit for purpose and was not offering insights or tools that could help in the day-to-day complexity of organisational life. We created a small community of practice to share innovation and create a space where the deep problems the group faced could be interrogated. The output of the group was an agreed sharing of eight core beliefs that charted the trajectory of innovation as they began to rescope their practice. The beliefs turned their own leadership development programmes upside down, but there was no double loop exploration of the underlying structural issues and assumptions each company faced. Innovation was about new curriculum and alternative delivery methods. The fundamental roles were never questioned.

However, the ‘cliff edge’ of commitment was explored but never resolved. That is the contradiction between coming away from a leadership development process brimming with warmth and energy but failing to change anything in a fundamental way. Moving forward with some optimism and many promises avoids the discomfort of rethinking. Then, by plunging back to previously learned behaviour (Harvard report, 2018) rethinking submerges beneath the surface. Again, Roger Martin’s idea that thinking differently is as important for embedding change, and perhaps longer lasting, as committing to doing something different, resonated (Martin, 2017).

The aspirational, ideal models of leadership were simply washed away by the impact of day-to-day work, alongside the general need to deliver. It required a deeper understanding of the process of work, and the transmission of knowledge and behaviour, rather than abstract, disconnected models that told you how to behave with no context to pin the behaviour on (Martin, 2009). This was a devastating critique.

The frames helped me to see that we could not fix this by changing content or taking a different approach to a specific problem, however much these parameters were altered. We had to dive beneath the surface to try to understand the underlying cause of the problem. That way the complexity of organisational life could be explored, not simply leaders' behaviour. This got at the heart of what work was, not who leaders were or aspired to be.

The structure: How the book is organised

Building Leadership Development Programmes has a four-part structure, starting with a focus on the context of leadership. This section establishes a critical link between the changing external environment, the focus and expectations of organisations, and the role of their leaders. This was found to be complex, dynamic and shifting around all three of those axes. As context changed, so did the expectations on leaders and the role of leadership in the organisation. I concluded that successful leadership development always took account of the context for leadership. This context focused on both the external environment (as it changed) and the expectations and aspirations of the organisation (as it evolved). There was nothing static and permanent, and helping leaders adjust to a constantly shifting perspective was critical and should have been endemic.

In contrast to that conclusion, most development programmes I explored appeared to be deliberately designed to be context-free and therefore had limited value. Nicolini had powerfully and persuasively outlined the superficiality of organisational learning if it failed to take into account an understanding the way values, insight, knowledge and power are intermeshed. Leadership is always emergent, and its parameters are never fully contained. (Nicolini, 2009).

The characteristics of the four case studies

1. Leadership development at GE's Crotonville campus

Crotonville was synonymous with GE's success during the leadership of Jack Welch. It is iconic and world-famous. It was an obvious choice for the book as I had been granted regular access to the place. When the BBC leadership programme was being developed, the Crotonville model loomed large: we tried to recreate the spirit of the place, if not the physical space. We chose Ashridge Business School as a base because of the huge surrounding park and the opportunities it offered for calm reflection. It became, like Crotonville was to GE, our place to explore, challenge and be engaged outside the pressures of day-to-day work and in an environment conducive to rethinking.

I was deeply impressed by the quality of learning that went on in Crotonville and the mark it made on its graduates. I also liked the idea that Crotonville was almost a symbolic and ritualised locus. People passed through and somehow attracted its fairy dust because of its antecedents. To have passed through Crotonville during your GE career was a badge of honour that resonated years afterwards. Although no longer used as a teaching space, the Welch 'bullring' where executives were challenged vigorously by their peers daily, had been left unchanged as a symbol of the historical significance of the place. Indeed, such is the weight of Welch's legacy that, on his retirement from GE, Crotonville was renamed the John F Welch Leadership Development Center in recognition of the work he had done to build its reputation and define its purpose.

So much thought had gone into the design of the campus, but it did not remain an empty and sterile shrine to Jack Welch. Post-Welch, everything was redesigned and reimagined over the five years following Welch's retirement. Spaces were built for both rigorous debate and creative exploration. Everything was designed to create contrast and new opportunities. Private cocoons were

set up for reflection and quiet thought all over the campus, and the park was reconfigured to create a varied series of trails through woods and open parkland. The original farmhouse, that Welch had turned into a late-night bar where his male executives debated long into the night, was gutted and turned into a juice and espresso bar designed to accommodate informal discussion amongst small groups and expose a more feminine side to leadership. This was both a practical and symbolic repurposing for an altogether different age. The male bastion had been breached. In addition, the curriculum was rethought from scratch.

I tried to give a flavour of Crotonville in the book and celebrate its many strengths. That case study would have had a totally different status if I were writing it now. Things have moved on dramatically in GE and the company is fighting for its life, having made a catastrophic series of poor leadership decisions. Just the title of Thomas Gryta and Ted Mann's recent book sums up the shift in fortune: *Lights Out: Pride Delusion, and the Fall of General Electric* (Gryta, 2020). History has been a harsh judge, and Crotonville could even be up for sale. In some way it reflects the company's hubris. But at its height, Crotonville did change people's lives, and it built enduring leadership values throughout the company and acted as a connection point for the various companies that made up GE and ensured that, whether you made locomotive or jet engines in whatever part of the world, the same values dominated and the same focus on development endured. It was leadership development in the context of GE at that time. What it could not do was correct a series of ill-informed and bad acquisitions that came right from the top. In Gryta's words:

What was actually unfolding [in 2017] behind the scenes at GE was dysfunction tending toward chaos and a confrontation with the past that was mere weeks away from spilling into public view. Beneath the placid surface, GE was in total disarray. (Gryta, 2020: 8)

As the company had become 'a sort of proxy for the American economy as a whole... Its collapse was unimaginable' (Gryta, 2020: 23). GE's focus on leadership development and growing

its talent had been one of its glories, but that process had become toxic. Poor leadership had pulled the company apart and the peaceful transfer of power across the ten CEOs that had led GE from its inception had run out of steam. John Flannery – the eleventh internal appointment to the role – lasted, largely through no fault of his own, barely a year before the Board took decisive action.

There is a critical lesson: to engage with the practice and understand what is going on beneath the surface gloss of the organisation. Very soon after the chapter was written, Crotonville became merely part of the reinforcement process that shored up GE's credibility, rather than reinforced its authenticity.

2. Leadership in Antarctica

The case was designed an illustration of a formula I had developed that linked insight and discovery to experiences that take away the security blanket of what is familiar and normal. Taking 100 people to Antarctica was a dramatic example of the impact caused by disconnecting people from their normal connectivity (there is no mobile phone network in Antarctica), dislocating people from their familiar and know territory, and subjecting them to the discomfort that such a hostile environment generates – but doing so with a high degree of both physical and psychological safety.

The case study is an account of a leadership expedition to Antarctica. It explores the potential for heightened insight that unfamiliar environments can generate. The focus for the group was on individual reflection, one-to-one coaching, and building frames to shape and develop insight. Many of the elements from that expedition could be extracted and used in appropriate contexts that would challenge leaders. But the limitation of the case study was the inbuilt assumption that all this unique experience was easily replicable in different contexts. The attempt to extrapolate from such a unique and powerful experience was tentative at best. There was plenty of evidence that Antarctica changed

people in positive ways, but scant evidence this was either directly or indirectly possible in other less dramatic locations.

3. Leadership in a university

The third study examined how Deakin University in Melbourne, Australia, completely reimagined its executive development. The university replaced its traditional formal development course with the creation of an 18-month-long learning community. The idea was that, over an extended period which included group tasks, one-to-one coaching and a series of topic-based seminars, participants would build their own core set of behaviours and work on challenges in their roles at the university. The explicit aim was to establish a community of practice that would continue beyond the formal programme. Participants were encouraged to keep a journal and work on their own effectiveness as leaders, whilst supporting their colleagues in their own development. The concept of a leadership community was a critical element of the programme. The process was personalised in the sense that all participants chose, and were held accountable for, their own specific goals and they chose their own route to achieving them in the context of their own role.

It was structured in five distinct phases, starting with the initiating phase where context was established, then moving to the discovery phase where individual needs were defined and the group was set up. The third part was the engagement phase where each participant looked at the feedback from their initial engagements and used that data to develop their own learning plan. Each of these phases lasted one month. The fourth phase lasted six months and was focused on changing behaviours and mindset rather than on content. The final phase continued for 12 months and was identified as the 'super charge' phase. This was where, with coaching support, the learning was firmly embedded, and the new skills and behaviours were practiced.

I was impressed by the commitment to behaviour change over an extended period and I interviewed several the participants who had used the programme to completely review their leadership practices in the university and had built a strong stake in the community of practice. The entire cohort had continued right through to the final 12-month phase, but the stickiness of the programme was uneven by that point. However, the strong commitment from the university to think again about how their leaders were developed and build a more effective cohort-based model for leadership development was noteworthy. Sadly, the leadership group for the programme dispersed and it was only run once in the format described. But it demonstrated that, by reimagining leadership development, better outcomes and extended development was possible.

4. The NHS Leadership Academy

This programme was selected because it represented a huge, multilevel leadership development strategy designed as a comprehensive change programme. It would begin a long-term process of altering the role and practice of leadership throughout the NHS. It was designed around the six NHS core values, and the aim of the programme was to help staff understand how those values impacted both individual behaviours and organisational structures, whilst at the same time empowering participants to radically transform both. In retrospect, Nicolini's (2009) zooming in and zooming out metaphor appears to be at the heart of the design.

The academy was initiated after a series of Government inquiries into significant failures at NHS Trusts and hospitals pointed to a weak and divided NHS leadership. One critical element of the programme was to encourage clinical and non-clinical staff to work productively together, something that had never been part of NHS culture and a weakness highlighted by the Government reports. The scope was comprehensive and the outcomes ambitious. In a sense it gave permission for staff to

initiate wholesale change at all levels to transform patient care. Patient representatives helped in the design of the programme and attended some of the face-to-face events.

It included a large-scale and complex simulation of an NHS Trust that cohorts had to manage and run. Many of the conflicts and challenges experienced by those directing NHS Trusts had been built into this fictional model. There was online learning, coaching, group sessions, action learning sets and a large amount of reflection that emerged through some of the assignments. One key element was helping staff to realise that their role and behaviours were part of the problem, and their response and changed behaviour could become part of the solution. Finally, it was led from the top: it had high-level ministerial backing and the head of the NHS launched and endorsed the programme.

If this in-context, well-thought-through, long-term initiative was not able to change leadership inside the NHS, it was hard to imagine a programme that could work. It was an obvious case study. The weakness of my case study, however, was the lack of evidence of its long-term effectiveness. It has now been phased out, having run its course, but there is no comprehensive account that I can find of its impact or legacy. It certainly transformed the lives of people who participated, in the sense that they saw and understood their role in a bigger system, and those thousands that went on to complete a master's degree in healthcare leadership expanded their career prospects. But the missing evidence was whether these small-scale local examples joined together and profoundly changed the way the NHS operated from ward to Board across the whole country.

Conclusions

I set out to challenge the reader to rethink the nature of leadership, and therefore to build leadership development opportunities that would lead to enduring change at both a personal and

systemic level. My insights included the primacy of initiatives that reflected the specific and lived context and recognised that poor leadership was not so much about the failure of individuals, but it was systemic. And you fixed it by fixing the system first.

If we look at Rittel and Webber's criteria for wicked problems (1973) the very act of observance changes the nature of the problem. And how you choose to intervene alters what you are attempting to fix. Each element offers not the whole problem but a single facet of the problem. This intermeshing of individual perspective, organisational culture and processes – set inside a volatile and unstable external environment – is complex and therefore requires multifaceted and integrated solutions, and not simply another programme, yet the book's title, ironically, refers to "programmes that work". (Paine, 2017)

Many people in leadership roles have to solve wicked problems that morph as they are examined and alter as changes are made. At a profound level, I can see how the book touched on those substantive issues but did not reinforce that viewpoint or offer clear ways forward. Its central message was that you needed to re-examine elements of leadership development to do some things differently. There was little incentive to challenge organisations to think through the whole process again. In some ways that trajectory outside learning and development to offer the broader context of work was not a radical enough departure. Its conclusions emerged from the research process, and the case studies reflected that anchoring. They were accepted too readily as solutions, without more analysis of the complex underlying reality, structure, assumptions and value systems on which various philosophies of leadership development are built, and which need, in my view, more fundamental change.

I can now see that the book was on an incomplete journey from vague and superficial ideas about leadership to a radical repositioning of how leadership was both the problem and the solution. To resolve those challenges required significant insight on the part of the leader, as well as specific permissions from, and empowerment to, change organisational structures, processes and culture. The book never quite reached the destination it had set out to reach.

I had wanted to clarify what kind of leadership development would lead to both personal and organisational transformation, and although I eschewed models of leadership, I nevertheless did not move beyond that design frame. The intermeshing of insight from fieldwork that changes practice – so eloquently covered by Silvia Gherardi (2012) – is absent from the book and that detracts from its impact. The opportunity to surface what Middelow calls ‘unknown knowing’ (2012) does not really feature and therefore the challenge to have a profound debate about how leadership could and should evolve was missed.

Chapter 6

Public Works: The Learning Challenge

And yet, this is what we must seek: a reconciliation between...description and explanation, between object and knowledge. (Roland Barthes, (1972) *Mythologies* 160)

Introduction and context

In some ways, the reflection on, and the analysis of, this book was the most challenging and revealing for my exploration. This review process has helped me to realign my understanding of the role of learning and development inside organisations.

My conclusion is that *The Learning Challenge* represents and demonstrates a much more traditional approach to writing about the nature and practice of learning and development inside organisations than I would wish to undertake now. It therefore runs somewhat against the grain of the other two books and the underlying assumptions of the University of Pennsylvania CLO executive doctoral programme.

The frames exposed the limitations of my approach and revealed an unexpressed value system in the book. My reflection, therefore, exposed the book's limitations and omissions. I realised that I had largely taken everything at face value and embraced a single loop account of L&D when a double loop perspective was demanded. Rewriting it now would involve offering a more oblique and critical perspective of that domain. The position, process and reputation of learning and development inside organisations would be an area for exploration, not simply for description. The holistic

investigation of the nature of organisations is absent but critical. The book describes what is there, not what is emergent.

Big shifts in power relationships between suppliers and their clients was not addressed. Given the consolidation of the market over the last five years, the ability of those companies to define and contain conversations around what is important and what should be delivered is ignored in favour of a celebration of how technology can transform the delivery and management of learning.

Suppliers have increasingly dominated the field as technology has taken a larger role in the management, creation and delivery of learning and development. The big suppliers dominate the conferences, commission the most research, and offer solutions defined around problems they have defined and contained. That supplier hegemony has narrowed the sphere of debate and shifted the focus from a consideration of the nature of adult learning, to the more superficial focus on the process of delivery, management and reporting of learning.

Logistics have supplanted debate. No one ever asks the 'why' of learning! The huge questions about the very nature of organisational learning and its relationship with the larger organisational strategy and performance have been capped and controlled. The focus is exclusively on the 'how' of organisational learning.

This has changed the nature of the discourse around organisational learning and requires an alternative discourse and frame to illuminate it. I felt that my choice of a sociological and philosophical analysis through Bourdieu and Gherardi, coupled with an intense examination of practice explored by Davide Nicolini, changed my discourse and allowed me to take a close examination of the context of organisational learning at an epistemological level.

My reading encouraged me to build an analysis of the nature of learning in the context deeply embedded into organisational life. Learning was neither a delivery process nor an access issue, but a deeply contextual and ideological search for meaning, embodied in the fundamental natures of organisations. Learning is more complex and deeply ideological. And the nature of learning itself is not just how adults learn, but why and to what purpose. Learning embodies the organisation, and the type and process of learning reveal the impact on the organisation. This can be manifest or withheld. The mode of learning determines the limits of agency and empowerment. I realised that only where self-determined learning (Hase and Kenyon, 2013) was manifest and expected, was a learning culture viable or even possible.

The reflection forced me to move from an inward focus on the processes of learning to an external focus on the nature of learning in the context of the organisations in which learning took place. We had to see the field in plain sight to redefine it. This required taking perspective on the field, not taking it for granted. The lenses revealed a more holistic world where it is impossible to examine the field separately from the structural, ideological and sectional interests that inform it, and the perspectives that condition our viewpoint and define our reference points and therefore our locus within it. The book fails to achieve this but points the way to a radical and fundamental re-evaluation of learning inside organisations, defined by what is absent rather than present. I was able to codify eight insights.

Eight insights

1. The book accepted unquestioningly a reality presented to us about the nature of contemporary learning and development without asking double loop questions about how meaning

has been constructed and why. The significant goal of how to make learning more effective was equated reductively, with an offering of more of the same. It is Kahneman's system one thinking (2011) and Argyris's single loop learning (1977). The norms and assumptions around the purpose of learning are reinforced rather than being questioned and challenged. This makes it hard to envisage any great leap forward other than that engineered by advances in technology; and hard to expand the discourse beyond the scope that is elaborated by suppliers. The book is a self-limiting and inward-looking project.

2. Whilst the book offers up a single loop learning perspective, it simultaneously shadows and postulates about the need for, and the power of, double loop learning to get at the questions that lie beyond the questions we ask. In taking this approach, a fundamental and inherent contradiction is built into the book from the beginning. The book offers a closed system analysis whilst trying to establish the nature of context. This process is unarticulated but creates tensions and presents an unresolved dilemma for the reader.

3. The book does not challenge the nature or purpose of contemporary corporate learning. It steps over the insights of Roger Martin's *The Opposable Mind* (2009) thus avoiding the complex reality that lurks between organisational need, individual development and the menu of opportunities offered by learning and development systems. The book, by accepting an orthodox and somewhat simplistic model, undermines the need to question its fundamental assumptions. The perspective is fixed when it should be inconclusive and fluid.

4. The environment it describes assumes that learning and development operations are closed systems. Therefore, the model of change that is implied is more mechanical than organic. The basic understanding that underpins Senge's *The Fifth Discipline* (1990) is based on open systems and

organic models of the organisation. A successful conceptual model of learning and development needs to be based around the concept of an open system. This allows the complex relationship between what that operation provides and what the organisation needs at a profound level to emerge. There must be permeability between the cells so that information, insight and data can flow between the business as a whole and its learning and development operation.

Argyris would argue it is the degree of openness and double loop thinking at speed that leads to alignment between business and L&D output. The focus on only improving the quality of existing content, regardless of its validity, or increasing the quantum of learning *per se* is a self-limiting process. We can paraphrase John Kotter's thoughts (2008) on the difference between leadership and management: learning leaders must be able to work on the learning systems, not just within them.

This is the only way to make any kind of profound impact on the business. Without that, the learning offered will reinforce the unexplored assumptions about what those needs might be whilst ignoring the profound needs of the organisation. This, in turn, builds a compliance culture which avoids direct engagement with complex systems and processes in the organisation and the need for empowerment and validation of those working in it. That creative engagement with the organisation and the development of generative skills to own and fix the organisation and develop the right attitudes to help people evolve their working environment is wholly missed.

5. Bourdieu's work shows, clearly, that the book does not in any way challenge the field and does not engage with the structures and component parts of the habitus. The book is based on a comfortable blindness to the complexities of a fast-changing field, and a lack of awareness that it is habitus that makes us comfortable, when we should be exploring and challenging its precepts.

There is no sense from reading the book that the worldview and the value set experienced by learning and development professionals is conditional, mediated and needs to change. The opportunity to question and deconstruct that value system to understand the underlying relationships more clearly, and therefore transform rather than reinforce, is lost.

6. The book does not focus deeply enough on fieldwork and practice. It is based on drawing conclusions from an observed but unquestioned reality. It is a narrative of superficial received opinion rather than profound seeing. The element missing is Nicolini and Gherardi's focus on the meta-understandings that are built inside organisations in informal and social ways that can only be surfaced by close observation and fieldwork. The need to understand what is happening at a metalevel and identify what learning actually takes place in the flow of work, is lost.

There is a huge gulf, usually, between those espoused models of practice and those that emerge from a better understanding of context and a more holistic approach. That gap alone explains why so much leadership development fails. Therefore, there is no basic questioning of the nature of practice, nor an attempt to understand what learning emerges informally and socially from experience and how that can contradict the 'official' learning purpose. The tone is one of reinforcement and endorsement of what is declared and apparent, rather than emergent. The ebb and flow of experience and the inbuilt contradictions thrown up by the dominant culture that evolves in the spaces between people and the gaps in the organisational narrative are ignored. Roger Martin (2009) would argue it is the fundamental recognition of that contradiction and challenge that allows insight and, therefore, change.

7. The book had a clearly defined audience in mind: me at the beginning of my learning leadership journey. It is undoubtedly true that its content would have been helpful in explaining and

mapping the domain. But much of that information was already available to me and could have been absorbed from exposure inside the environment. Of more value would have been a framework to help me understand the nature of the organisation and how meaning is made inside complex systems. These elements are largely missing from the book.

8. The book is based on individual learning; the concept of organisational learning, in the sense of March and Argyris, is entirely absent. A fundamental awareness from this research is that knowledge and insight need to be shared so they can resonate across the organisation. That is how insight and competence remake ‘the way things are done around here’. A group of highly competent individuals does not necessarily constitute a competent organisation unless the learning is embedded and shared. If, as Peter Drucker may, or may not, have claimed ‘culture eats strategy for breakfast’ (see Martinez, 2006), it is only when those shared understandings define the way of operating that learning has done its job.

It is important, but not sufficient, to build competence in the workforce. However, the right climate for learning, including building critical environments such as psychological safety, are crucial for deep organisational learning. This is based on connection, networking and open admission and exploration of what is unknown or inexplicable. Therefore, I felt compelled to write my third book on learning culture (Paine, 2019; 2021).

Organisational learning exposes and fixes errors and explores and agrees solutions in order that a workplace can continuously remake and remodel itself. Nicolini exposes the poverty of thought that defines best practice as a model (2011). Everything is contextual including practice. There is no ‘best’ practice only the most effective practice in a specific context. James March’s

exploration of the tension between excellent exploitation and critical exploration continues and is a constant backdrop for organisational learning.

The underlying model in the book shows how to get better and better at exploitation but pays scant regard to the need to balance exploitation with exploration and double loop understanding of the challenges being faced. There is a pervasive need to re-establish equilibrium inside organisations so they can adjust and reconfigure regardless of the changing external environment. Organisational learning is, therefore, not a practice to be polished, but a process to be challenged and transformed.

The three parts of the book: Conflicting elements

The book has three parts. Each part is illuminated by a separate frame, so the parts will be examined in turn.

Part 1: The manifesto for change

This is the establishment of context for the book and for learning inside organisations. It is set inside a broad sweep of change. It assumes alignment between the changing workplace, the changing nature of work and performance, and the overall impact that technology makes on all those elements.

The analysis is firmly neo-classical, building on the unspoken presence of McGregor (Bennis 1966) and his focus on employees' self-actualising needs. It omits any exposure to post-modern approaches to organisational analysis where the basis of meaning is itself under fire. The gap between espoused and assumed values, and why things go wrong in organisations, could have offered a deeper agenda for the remainder of the book. The book explains the changes but not the

misalignment between the elements of that change. The disjunction between what the learning leaders profiled do, and how that relates to the change they are embracing, is unacknowledged and the contradictions that emerge are not built upon.

The book contains useful analysis of how and why work is changing, and the nature of successful workplaces and inspired organisations. It examines the link between successful workplace environments and creativity and innovation and highlights the value that embeds those practices. The chapter profiles Traci Fenton and her organisation, WorldBlu, and its embracing of, and validation for, those organisations that she can classify as: ‘freedom-centred’ companies (Paine, 2014: 12).

The detailed analysis of the context in which work is changing and the theoretical impact on the role of the learning leader in chapter two (Paine, 2014: 30-34), however, does not take shape in the profiles of the five learning leaders that share chapter three (Paine, 2014: 39-59). In fact, they operate independently of the environmental factors that had been laboriously crafted earlier in the section. This rich seam that would have taken the discussion into the double loop of understanding is left hanging in the air. The logic and the coherence of part one is maintained by silence rather than by investigation and analysis.

The fact that one of the five learning leader cases studied had to be anonymised because his boss (the head of HR) refused to give permission for the local authority’s name to be used or the role of L&D to be spotlighted, should have highlighted an under-investigated complexity in the narrative and pointed to unresolved challenges in the relationship between the L&D team and the rest of the organisation. Therefore, the recognition by peers of excellence and of new kinds of innovative learning delivery was often neither acknowledged nor endorsed by the companies or organisations in which they worked. Indeed, the unexplored tensions between the HR department where many of the

L&D leaders were based, and the demands emerging from the operational side of the business was glossed over.

All five left their roles within a year of being interviewed and few, if any, were acknowledged for their achievements or contribution by their respective organisations. Their reputations were forged in the community of learning professionals around them, rather than in their organisation or business sectors, which included banking in Australia, distribution in Prague, petrochemicals and local government in London, and technology services in Washington DC.

The book revealed a meta-narrative which points to the heart of the crisis facing learning teams. Taking the initiative to deal with operational and performance issues related to the day-to-day complexity of the business does not always sit easily inside an organisation or an HR operation used to witnessing learning delivered at arm's length via courses pre-ordained and pre-approved at a macro level outside the flow of work.

The tension resides in conflicting world views and mindsets:

From	To
Order taking	Proactive engagement
Learning as formal courses	Learning in the flow of work
Pre-approved stock	Engagement in the moment
Formal	Informal
Learning separate from work	Learning integrated into work
Learning team as technician	Learning team as facilitator
Learning as done to	Learning as built with
Learning as product	Learning as process
Learning team outside strategy	Learning team integral in delivering strategy
Learning separate and isolated	Learning integrated
Learning leader as engineer	Learning leader as innovator
Exploitation	Exploration as well as exploitation
Defined by the field	Defines the field

Part two: new ideas for learning

This part of the book explores five core areas for innovation in learning and development to map out a range of new conceptual frameworks that have the potential to transform the execution of learning. The challenge is that each is presented as a self-contained meta-conversation inside learning and development, rather than examples of an emergent realignment of what learning is inside the organisation. The big picture is absent.

The frame of the narrative is around doing things better, rather than meeting new needs in new ways. The locus and the critical link between innovation and performance is unexplored. It is about the 'what' not the 'why'. It encourages system-one thinking (in Kahneman's terms) and instant solutions, rather than system-two thinking and a deeper exploration of why and for what end. This is moving in the opposite direction from Roger Martin, who advocates integrative thinking and big-picture exploration. The wider context that links the five areas explored in part two is invisible and unknown. Therefore, the focus on practice is incoherent and ill-defined. The wood is lost for the sake of defining the trees.

The five areas that are explored track some huge shifts in learning and development. Charles Jennings' work on the 70-20-10 frame has transformed how many organisations account for and define learning and contextualises the impact of formal learning programmes (Arets et al., 2015). The switch to focusing on measuring the impact of learning, rather than counting 'likes', pioneered by academics like Brinkerhoff (see for example Brinkerhoff, 2019) is of critical importance if learning and development is to be taken seriously. Thinking about performance support at the moment of need, rather than an endless diet of courses, transforms just-in-time learning (see Gottfredson and Mosher, 2011).

Finally, redefining the role of instructional design was another broad axis of change. The section traces the role from a self-contained intrinsic process based on its own design rules, to an extrinsic pragmatic focus on the nature of content that is needed inside the organisation. Standard practice (applying the rules) yields to a more dynamic mediation role between the learning team and the business, to ensure clear understandings are shared and translated into appropriate learning design and delivery processes.

The fact that this section of the book has neither an overarching introduction to set the context, nor concluding remarks to track the overall lessons, reinforces the separation of the areas and undermines any attempts to integrate the various accounts or take a holistic, integrated approach to broader challenges. The chapter's potential contribution to a wider discourse of change and complexity inside organisations is lost in favour of neat parcels of insight. It misses the opportunity to tease out the connection between learning and organisational success.

Part three: The game-changers

The third section explored three new and ill-defined game-changing concepts. The book attempts to sketch out how they impact on learning practice. The first covers big data and learning analytics; the second the impact of neuroscience on how we understand learning processes in the brain; and the final section explores the broad trends in learning technology.

Each of these areas has become immeasurably more important in the years since the book was written (2013/2014). It correctly predicts that the use of small integrated apps would complement large talent suites of end-to-end software, so that organisations could build learning eco-

systems rather than be dependent on huge suppliers who controlled inter-operability. What it did not predict was that many of those small, agile software systems would be gobbled up by the big players and integrated into competing mega-suites. At this point there is a raging debate to be had about the shifting balance of power between the purchaser in relation to the supplier. This debate is an invisible thread through the final part of the book, but it does not alter the trajectory of the narrative.

The third part of the book describes the ‘what’ of technology, big data and learning systems but not the ‘why’, or the shift in ownership and control, that surely will occur when learning organisations invest in total systems and outsource control of the narrative to a handful of large suppliers. These tools control vast swathes of the learning landscape and therefore prevent fundamental questions about purpose and mode to be explored. It is as if the locus for organisational learning has been locked into single loop thinking based on a deductive model where problem leads to simple solution. The opportunities to interact with the broader and wider challenges of organisational development are, consequently, lost.

Conclusions

The book has a deep contradiction at its centre. It outlines the process and narrative of why organisational learning is failing, drawing upon a discourse that purports to celebrate its success. Everything important about the book is in the margins of what is not elaborated, rather than what is described. Roger Martin’s challenge, to wade into complexity to find better models and a new reality for learning and development (2009) is, sadly, absent and left for future writing, different approaches, and a more critical stance. The zooming out of the first part does not bridge into the zooming in on the other two parts because context is missing.

Chapter 7

Implications for practice

The world is fundamentally made of relations and events rather than permanent substances. Where we, as every other thing around us, exist in our interactions with one another. (Carlo Rovelli, *Helgoland*)

The process of writing this context statement has set an agenda for me that emerged and then developed at each stage of the research process. It can be summed up in the title of Nick van Dam's 2018 book, *Elevating Learning & Development*. I take the title to mean elevating both in the sense of raising L&D so it can see beyond the confines of courses, programmes, and catalogues to look at what the organisation needs, and in raising its game and engaging deeply with the processes of work as well as the processes of learning. The two meanings align with the two words that resonate with my research: fieldwork and practice.

I am asking L&D to redefine what 'practice' means. Working on learning inside an organisation is very different to working on learning in an educational establishment or working as a consultant outside a specific structure. The very fact of being inside an organisation, or being brought in to understand a specific challenge, redefines the scope and trajectory of learning as it is part of a wider dynamic and aligns with other complex systems. It is learning in context – focusing on the individual and the working environment as well as the individual in the working environment. This requires an understanding of the underlying challenges, not just the obvious 'problems' to be solved. It needs a fundamental double loop learning model and approach (Argyris, 1977).

The purpose of L&D should shift from proffering ready-made solutions to trying to understand the implications for the organisation's underlying structure, norms, and value systems, as well as policies and practice. It involves being willing to work to change the circumstances from which the problem emerges, rather than focusing on the deficits demonstrated by individuals in response to faulty underlying structures (Nicolini, 2012). This demands a different approach and a different mindset (Martin, 2009). These in turn change the nature of practice.

If the outcomes of this process are to have any significant meaning, it will involve careful fieldwork in Nicolini's sense of the term. This is a way to shift perspective away from being told, and thereby accepting closed narratives, to understanding what happens through a process of observation and close questioning – moving from the cause to the underlying cause. We need to impose a discipline of careful thinking about practice, as well as taking time to reflect on practice, and observe and check perceptions and conclusions. It is necessary to recognise the complexity of organisational systems using Senge's perspective (1990) and the position of the individual inside those systems. It also requires the evolution of practice as contexts change.

Embracing the idea of fieldwork changes the epistemology of learning systems and reveals the individual as both subject and object of the learning systems created. The process of 'elevating' the contribution of L&D places the learner within work, so the focus is both on the learner and the systems the learner must navigate. L&D is, therefore, operating consciously as part of a system that it is trying to both improve and adapt to create the conditions for optimised learning at individual and organisational level.

It is necessary to 'zoom out', as Nicolini described it (2009), to capture the whole system practice to see how that environment may change. There is also a parallel mandate to 'zoom in' to

understand, through fieldwork, what work is like and what conditions make work successful and empowering, and what conditions do the opposite. Only by zooming in can you see the complexity of knowledge creation and exchange, and the ruptures that occur in that process. This dual perspective allows L&D staff to engage with bigger meta-processes in organisations as well as the processes of knowledge transmission and action during the day-to-day work.

The second insight is around the power of communities. Part of the richness of the learning at Middlesex University is the encouragement to engage with proximate pedagogy. Having oblique discussions with people conducting research in related but different cognate areas such as dance, painting, chemistry, and government policy, builds links between pedagogic frameworks and undermines intellectual sectarianism. This helps elevate thinking, but also fosters a sense of community and adjacent problem solving.

In many ways, Reg Revans' description of action learning sets as 'colleagues in adversity helping each other' (Revans, 2011) captures that sense of working in a larger academic context as a foil to one's own narrow area of interest. Organisations need to give 'colleagues in adversity' the opportunity and permission to work collectively on the problems and challenges they face. A learning culture ensures that learning emerges from work and will be put back into work.

The process of research led me to an overwhelming conclusion. Despite the number of years, I had worked in this field, there was much I simply did not know. I had been complicit in focusing on making L&D better – better metrics, better technologies, more effective learning, etc. I now see that much of this was out of context. Making learning better does not always make learning more effective inside organisations. The focus should be on transformation of the working environment, not simply better learning. I can't help but feel I have spent a significant part of my professional life

not just ‘rearranging the deckchairs on the Titanic’ but polishing the brackets that hold them to the deck!

What emerged from that research was the clear need to reimagine and reinvigorate L&D. It is important to rethink; not so much the processes of learning, because they have been explored and understood, but the role of learning in organisations in the way that Argyris did (1992). This requires a different kind of engagement – one that is solidly based on fieldwork. It also necessitates a new understanding of the complexities that link thought to action at individual and systemic level.

In many ways this parallels HR’s trajectory through the last ten years: from being tactical and outside practice – almost celebrating the separation from the workflow – to a more engaged strategic approach where HR helps shape the organisation from a people perspective and makes it fit for purpose (Bersin, 2021). L&D has not quite made that transition, and it does not have ten years to get there. If L&D cannot refocus how it can change organisations and help them adjust to a changing context as a primary mission, it will struggle to prove its relevancy. This could bring its very survival into question.

The other threat to L&D is surrendering agency to the big suppliers. These increasingly complex and multi-faceted companies will offer comprehensive solutions on their terms. L&D will be told how to solve wicked organisational problems in superficial ways. The balance of power between supplier and client has shifted over the last five years as the educational technology giants have consolidated and absorbed the smaller players. This, in turn, means that learning ecosystems offer fewer ‘pick and mix’ and more end-to-end systems. The danger of this process is that, even in very large companies, L&D will have less agency to act independently and could be reduced to

signing cheques, having outsourced its thinking, disengaged from fieldwork, and stopped seeing practice as a relevant area to develop.

There is a possible parallel in the way that IT went from building technology systems around the organisation, to fitting the organisation into whatever giant technology infrastructure had been adopted. At one extreme, we have witnessed the workforce having to adapt to technology, not technology adapting to the workforce's needs and aspirations. In many instances, IT staff have surrendered agency to one of the big three IT systems. This is not universal, but a worrying trend.

The challenge now is to go back and re-engage with the big suppliers; to build positive, creative relationships where the technology engages with practice and works from a profound understanding of organisational need. This is a partnership of strength. Both parties must build conversations as equals. It is not about RFPs and box ticking, but an extended conversation around helping the organisation to improve, and helping the workforce do better work, as well as learn and grow. Neither the suppliers nor the organisation should be hiding in domain specialisms.

I have always seen myself as an outsider, never quite embracing L&D nor being embraced by it. This research has explained some of the reasons for that, and helped me articulate the way to move from an emerging sense of frustration towards a mission to redefine L&D. My uneasiness now has focus and direction. The research process has given me the confidence to challenge the status quo for a resounding mission: to help organisations transform themselves.

The main outcome is that I now have a two-year agenda. The first task is to spill out these insights into a new book, tentatively called *Redefining Learning at Work*, where the insights from this research process are turned into an agenda for action. The second task is related to the first. I

want to disengage with complacent narratives of success to get into a deeper exploration of practice. That will allow me to build practice paradigms for fieldwork going forward that can be used to understand the double loop narratives in organisations.

I intend to work with teams that are prepared to take their time to see their world differently and reimagine their role. I will take on a larger direct coaching responsibility. I want the groups and individuals I work with to own and celebrate that different perspective. There is a need to refine the discourse within L&D so it is plugged into the organisational narrative and does not stand apart. There must be greater reflexivity as a process of insight gathering and understanding. There is a need to build 'integrative thinking' (Martin, 2009) – in essence, a double loop approach to analysis. This is not a crossroads for L&D but an inflection point that will enable learning teams to take their organisations to a different level.

It is not about reconstructing L&D but rethinking and reimagining it from top to bottom. This task will take me on a new extended journey. I worked my way through L&D to become a practice expert. The research journey explored by this context statement has taken me outside my domain to the point where I can stand beyond it and look back in with new lenses to sharpen my understanding. I am now ready to reposition myself inside, but with a new and I hope more radical agenda.

Chapter 8

Reflection and reflexivity

Nothing has really happened, until it can be described in words. (Virginia Woolf)

The trajectory of my research appears to be encapsulated in the concept outlined by David Dunning and Justin Kruger in their seminal 1999 paper, which is now universally referred to as the Dunning-Kruger effect. Although the conclusions from Dunning and Kruger's research have been challenged on cultural grounds (DeAngelis, 2003) and on statistical grounds (as a description of a regression to the mean) (Jarry, 2020) the concept resonates.

I had no sense that my professional understanding of learning could be fundamentally challenged. Indeed, during my first encounter with Middlesex University I produced a summary of the structure and conclusions for my context statement! I was gently reminded that this may be a trifle premature. I was sent on a journey of metacognition to explore around my field rather than in my field, and therefore establish a broader context around organisational development and organisational structure that incorporated a wider, and hitherto unknown, habitus into which organisational learning was situated. That idea of learning as a situated function of organisational life became an enduring perspective going forward.

The purpose of this exploration was firstly to dramatically broaden the scope and reach of my understanding, and then to delineate frames that would allow me a way back in to explore my own

domain through fresh eyes. This process created a stage from which my public works could be reviewed and situated both in the professional sense as statements about learning, and as a trajectory that linked my own intellectual journey through corporate learning.

Finally, my long-standing relationship with the PennCLO executive doctoral programme became the glue that linked all my public works and helped me make sense of my personal and professional development. The insights into the evolution of my own sense of purpose and meaning paralleled my professional path of engagement and practice with that programme.

This journey took me from an initial abundance of confidence in my own standing in my professional domain, coupled with a clear sense of direction and scope, to an overwhelming sense of ignorance. I realised there were huge intellectual frameworks and concepts I had not been aware of, and these challenged the fundamentals of my understanding. I realised everything was far more complex than I had conceptualised previously, and that meaning and repositioning were elusive. I lost the ability to see the patterns of organisational life as clearly as I had done. Therefore, any attempt to draw conclusions was made more problematic. Previous conclusions appeared to me as partial and limited. I went through a period of confusion, disequilibrium, and loss of confidence.

That fog of complexity began to clear when I settled on the frames I wanted to use to re-examine my public works. They offered perspective, shape, and depth. I centred my approach around a number of important concepts that I found illuminating and challenging, and that helped me make sense of both the field and my own intellectual journey within it. Bourdieu took me outside my focus on learning and into the conceptual frameworks we all use to make sense of our world almost without being aware of them; his concepts of habitus and field were particularly rewarding.

The second major influence was drawn from the work of Davide Nicolini and his concept of both practice and fieldwork. Part of my disillusionment with much contemporary L&D was its failure to confront the concept of practice and situate that in the wider world of organisational development as a response to both internal factors and external forces. Practice is the concept that moves individual engagement from reflection to agency. I realised that much organisational learning emerges from being told about a specific situation, without any fieldwork to support it or any attempt to gather first-hand evidence. It can therefore be superficial and unchallenging. These tensions had to be surfaced and explored rather than suffused into the taken-for-granted systems and values that emerge from the habitus (Akram and Hogan, 2015).

Reflexivity is a critical element that operates in relation to the habitus. Without that engagement in transcendence from the here-and-now and the taken-for-granted, practice stutters and stultifies. Reflexivity must operate in relation to, and in opposition to, the taken-for-granted and the doxa. It is central, therefore, to the evolution of practice and the ability to reimagine learning inside organisations. We cannot and ought not to ‘live life in a taken-for-granted manner’ (Akram and Hogan, 2015: 609).

A central plank of this focus on developing scholar practitioners is an enduring ability to question the precepts that form our sense of reality. Roger Martin’s concept of integrative thinking added another dimension to my emerging models. By questioning the fundamental value systems and ‘truths’ which form our sense of reality, we are able to see problems as a whole rather than in fragments that are tackled separately. Martin pointed the way towards a systems approach for dealing with challenges. Stage three of Martin’s four-stage decision making process is pure systems thinking. He encourages us to ‘see problems as a whole, examining how the parts fit together and how decisions affect one another’ (Martin, 2009: 5).

In essence, Martin's model expects the integrative thinker to rethink and remake the world, rather than accept the world 'just as it is' because 'integrative thinking generates options and new solutions. It creates a sense of limitless possibility' (Martin, 2009: 8).

To this frame, I added Daniel Kahneman's concept of thinking fast and thinking slow (2011). Engaging the 'slow' brain without rushing to certainty embodies Martin's concept of integrative thinking. It also helped my engagement with the concept of uncertainty (Kahneman and Tversky, 1982) and the brain's rush to make sense which can be 'primed' by unconscious expectations emerging from the habitus and lead to what Kahneman and Tversky call 'spontaneous coding' where conclusions are quickly drawn because what emerges 'is something like it' (Kahneman and Tversky, 1982: 149).

James March's (1991) distinction between the characteristics required for the exploitation of capability and those required for exploration and discovery inside organisations was also very helpful and paralleled an approach to learning where only narrowly defined competence development was delivered, as opposed to building the competence to deliver alongside the competence to explore new avenues and new sources of value. Again, March's concept of the ambidextrous organisation where both exploitation and exploration flourish led me straight back to Martin's idea of integrative thinking, but with an organisational learning spin.

The final idea was offered to me by Gherardi's concept of learning in the flow of experience (2000). This paralleled work on informal and social learning in organisations and linked back to Nicolini and practice (Arets et al., 2015; Cross, 2007). This led me to a critical insight: the need to separate the two concepts of organisational learning and individuals learning in organisations. This

distinction became the crux of my work on learning culture, where I was able to separate a culture of learning (where the quantum of learning increases) from a learning culture where organisational learning informs and enables individual learning.

The trajectory I experienced neatly follows the course of the Dunning-Kruger conceptualisation. I went from confidence to a sense of being overwhelmed by complexity and confusion. What emerged was a lingering insight that, to have a sense of the situated field, a wider exploration and understanding of the habitus was required. Learning theory elided into political theory and sociology. I had to read widely outside my comfort zone to create distance and to zoom out from my known world. This process of zooming in and zooming out (Nicolini, 2009) became a comfortable and sustaining process.

Essentially, I had embarked on a necessary process of profound engagement with my own practice in context rather than in isolation. This led to an extended conversation with myself, my assumptions, and my beliefs. I now understand that the greatest insights come from reflexivity as well as reflection. I cannot stand apart from the nuance of meaning that I wish to explore. As I enter the frame, I change its parameters.

In some ways, I have travelled across my 'intellectual Antarctica'. It has been a rich and unsettling journey during which the mental discomfort I experienced was like the physical discomfort I encountered whilst in Antarctica. These two experiences were equally dislocating and discomfiting, but also equally engaging and rewarding as both left me refreshed and able to rethink my purpose and practice.

The dancer and the dance

Bourdieu scorned the concept of objectivity in his seminal work *The Logic of Practice* (1990a). He sets reflexivity at the heart of meaning by showing the limits of objectivism:

Objectivism constitutes the social world as a spectacle offered to an observer who takes up a 'point of view' on the action and who, putting into the object the principles of his relation to the object, proceeds as if it were intended solely for knowledge and as if all the interactions within it were purely symbolic exchanges. (Bourdieu, 1990a: 52)

If you accept your 'point of view' in any field, you tend to imbue the object perceived with your relationship to the object, so that any sense of practice or contingency is lost. In many ways I was trapped in a circular argument: people at work need to develop their skills; formal learning develops skills; therefore, people at work need formal courses. There is a 'cage' that explains the comfortable logic around what a learning leader does. The role is reduced to a single focus on increasing the efficiency and effectiveness of what was done before, without questioning its logic. There is a greater need, on the other hand, to reframe the whole business of the organisation in terms of increased capability and more rapid pathways to understanding and managing the pressures and disruptions on the organisation from outside as well as from within. This was much more about confirming the concept of an evolving organisational culture with learning at its heart, rather than building up a course catalogue. The function of learning was to re-engineer the workplace to make it fit for purpose and build processes that could execute this rapidly and endemically across the entire enterprise.

The habitualisation of new behaviours occurs 'from social structures, and they may be learnt through conscious learning, through socialization or through imitation and repetition' (Akram and

Hogan, 2015: 613). Creating a climate of learning that is partly formal but designed to emphasise the opportunities to learn socially and continuously from others or through ‘imitation and repetition’ was the way to change the game in organisations, rather than merely stabilise or even reinforce the limitations of existing structures and functions.

If we agree that the habitus is, in Bourdieu’s words, the ‘system of durable, transposable dispositions, structured structures predisposed to function as structuring structures’ (1977: 72), quoted by Resch (1992: 217), in other words the taken-for-granted assumptions that control our belief system and values, then the surfacing of those ‘structured structures’ is the first step to modifying them. Being conscious of the habitus, rather than having it as an invisible and unchallengeable fog of meaning, allows that modification to begin. A process of ‘situated reflexivity’ can emerge around meaning and identity (Akram and Hogan, 2015: 620).

The process of reflection and reflexivity has been a challenging and rewarding journey that has taken me to the heart of my practice and helped turn my understandings inside out. It has been a validation of my own intellectual journey through the three books, stitched together by the PennCLO executive doctoral programme. By exploring where I have come from, I have created a space for the next and perhaps more radical stage of my practice. The foundations built in this context statement are solid and enduring. In that sense, it represents the end of the exploration that produced three books, and the beginning of a new stage of intellectual development.

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