Embedding Work Based Learning within Organisational Practice

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This paper argues that work based learning has primarily addressed and rewarded the individual learner and that the 'workplace' which has provided the context for the learning receives scant attention. While we may purport to seek out and measure the 'impact' of the learning, this is rarely followed up.

I write from the perspective of one who was present at the birth of work based learning accreditation in Middlesex some 22 years ago. And for much of that time while recognising and promoting the academic opportunities the process offers to the individual I have also sought to redress the balance between individual learning and the impact it makes on others and the organisation from which it was derived (Critten 2009)

Indeed, before retiring from the Institute for Work Based learning at Middlesex University I sought to persuade the Institute to create criteria for assessing 'organisational learning' and making connections between criteria for assessing individual learning and adapting those to assess wider implications of impact within an organisational context. In short, I was seeking to create another set of criteria for assessing an organisation's claims to being a 'learning organisation'. But unlike the kind of checklists that appeared almost 20 years ago—largely written from an HRD perspective, which was more concerned with surveying an organisations' facilities—these would seek to focus on direct links between individual learning and organisational practice.

I begin by speculating on how we might reframe the way we think about organisations from a work based learning perspective and review some of the theories of organisation of the last 25 years, which have learning at their heart. I make no apology for drawing heavily on past papers (in particular Critten 2006) where I have drawn attention to the need to give as much attention to the 'context' within which learning is derived as to the 'accreditable' 'content' of the learning itself. I then give examples of work I am currently carrying out with companies supporting a particular Masters through Work Based Learning, the MSC in Sales Transformation, which is co-validated between Middlesex University and Consalia, the latter describe itself as a global sales performance improvement company. And finally I make recommendations as to how individuals, companies and professional accrediting bodies might reflect on the extent to which they can follow up and put a value on 'learning reach' and how it can make a difference to organisational practice.

1 Reframing organisations from a work based learning perspective

Ever since 1990 when Peter Senge published *The Fifth Discipline: The Art and Practice of the Learning Organisation* (Senge 1990) the idea of an organisation as a centre for learning has become a fashionable notion for many Western companies. The idea that the capacity to learn and change is what gives an organisation competitive advantage has a certain

attraction but for most companies that are all it remains: an ideal goal, which most companies find difficult to realise. At the same time, there has been an increasing awareness amongst individual employees that if their organisation cannot or will not change *they can* and what is more they can do it by using the resources and opportunities their organisation affords them. And just over 25 years ago the emergence of work based learning was to give them the voice and tools they needed to articulate their claim to knowledge.

Unfortunately, organisations, in my view, have neither recognised nor capitalised on the new knowledge that their employees were discovering. I well remember running a work based learning Masters Programme over ten years ago for a national finance company. Having read the final projects I produced a report for the company highlighting what seemed to me to be common areas for change and encouraging them to follow up on their employees' recommendations. But they were not interested, which makes these comments from one of the graduates on that programme all the more poignant:

> 'I have a sense that after the Masters programme I am in a different place but probably not the place the organisation wanted'

In this paper I want to propose specific ways by which employers and employees both agree on the place they want to be as a result of engaging with work based learning processes.

Five years after Senge had raised expectations about the capacity of an organisation to change through learning about itself, Nonaka and Takeauchi published *The Knowledge Creating Company* (Nonaka and Takeauchi 1995), which provided another way of 'framing' organisations and maybe could help close the loop between individual and organisational learning.

This brought to public attention the notion of 'tacit' knowledge which, was first articulated by a social philosopher, Michael Polanyi over 40 years earlier (Polanyi 1958). Polanyi maintains that *all* knowledge (including so-called objective facts of science) involve a personal and subjective component—tacit knowledge. But for this knowledge to be realised and shared it has to be made explicit. Nonaka and Takeuchi suggest that companies can make such knowledge explicit by a process of socialisation, externalisation, combination and internalisation (SECI).

While 'knowledge management' might be considered a step-forward in the link between individual and organizational learning, there is an underlying assumption that knowledge somehow exists out there as a 'thing' to be captured, what McElroy calls 'the supply side of knowledge management' (McElroy 2003). This is what Snowden refers to as 'the second generation of knowledge management' (Snowden 2002) the first generation, pre-1995, he likens to 'timely information provision for decision support and in support of Business

Process Re-engineering'. Snowden believes we should now be embracing what he calls the 'third generation of knowledge management':

> 'In the third generation we grow beyond managing knowledge as a thing to also managing knowledge as a flow. To do this we will need to focus more on context and narrative than on content' (Snowden 2002:3)

In my view, this represents a key shift in thinking about how learning and knowledge can make a difference in the context of an organization and its practice. The mainstream view is of knowledge being located in peoples' heads:

> 'The view is that knowledge must be extracted from individuals and preserved for the organization in the form of practices, routines and codes of one kind or another in which organizational knowledge is said to be stored. This perspective focuses attention on the codification of knowledge in artifacts, and the use of information technology' (Stacey 2001:40)

In sharp contrast is a 'social constructivist' view (sense making by individuals and sharing of stories) and 'social constructionism' (knowledge comes out of relationships) where 'knowledge is embedded in the ordinary, everyday conversations between people' (Stacey 2001:36). In such a context 'knowledge ...is not an "it" but a process of action' (Stacey 2001:116). This leads to his use of the term 'communicative interaction'.

The power of conversations was picked up by Patricia Shaw in a later book (2002) where she reinforced Stacey's notion of 'communicative interaction':

> In the movement of our everyday communicative activity, we are creating who we are and what we can do together within shifting constraints of a material, technological and social nature. This is not the way we usually describe what we are doing in organizations' (Shaw 2002. 30)

Etienne Wenger also saw 'knowing' 'as a matter of action, engagement in the world' (Wenger 1998) He saw organisations as comprising 'communities of practice'. At the heart of Wenger's philosophy is that knowing, like learning, is socially and contextually determined. Out of this active participation and engagement with others we arrive at our identity through a process of 'negotiating meaning'.

Communities of practice, as defined by Wenger (1998), can enable us to contextualise the concept of organisational learning in a way that the concept of 'the learning organisation' was never able to do (Senge1990 , Pedler 1991 et al), but the position of this paper is that however much proponents of the learning organisation espoused its principles when put

into practice they always came up against the boundaries of traditional views of organisation and management as grounded in a 'mechanistic' paradigm. The concept of 'organisational learning' as developed originally by Argyris and Schon (1978) provides exciting principles and possibilities, but, again, it is argued, it has proved difficult to 'operationalise' these principles for the same reasons as stated above – in the end traditional views of what comprises an organisation limits our capacity to put idealised principles about 'organisational learning' into practice (Critten 2002).

By contrast, the concept of a 'community of practice' could be developed and put into practice *without* having to be constrained by *any* theory of what is or what is not an organisation. 'Knowing' he says, 'is a matter of ...action, engagement in the world' (Wenger 1998:4). Out of the active participation and engagement with others, he suggests, we arrive at our identity through a process of 'negotiating meaning'. The argument, then, is that the heart of learning and knowledge does not reside in an abstraction called 'an organisation' but in 'Communities of practice [which] are the locus of "real work"' (Wenger 1998:243). Savage calls this 'work as dialogue' (Savage 1996).

The key word is 'practice' which Davide Nicolini in his seminal work 'Practice Theory, work and organisation' (Nicolini 2013) , has explored in the context of how 'practice theory' has evolved from Aristotle right up to Bourdieu. After such an exhaustive study in his concluding chapter 'Bringing it all together', far from proposing yet another theory of practice he proposes what he calls a 'tool-kit' approach: 'the core suggestion here is that understanding and representing practice requires a reiteration of two basic movements: zooming in on the accomplishments of practice and zooming out of their relationships in space and time' (Nicolini 2013:213). His approach he describes as 'rhizomatic' in nature – a rhizome being a form of bulb that extends its roots in different directions. He goes on to suggest a course of action:

> 'I propose that studying practices starts in one place with an in-depth study of that particular location and then spreads following emerging connections. These connections lead to other practices, which become in turn the target of a new round of zooming in… It proceeds with a zooming out movement which exposes the relationships between practices and continues with a new effort of zooming in on the new site and so on' (Nicolini 2016:238-239)

The theories he has examined have mostly shown that practices are social and relational. Like learning and knowledge, as we have seen, they cannot – or should not – be isolated and examined as a 'thing in itself'. but are involved in a variety of relationships and associations that extend in both space and time and form a gigantic, intricate and evolving texture of dependencies and references' (Nicolini 2016: 229). In order to explore more deeply the nature of any practice, Nicolini maintains that

'Zooming on practices can only be achieved by trailing connections on the ground, following people and artefacts as they move, chasing them wherever they go. Zooming is thus about moving around and amid practices, not hovering above them' (Nicolini 2013:239)

I suggest that most of the literature around the learning organisation and knowledge management that we have examined in our quest for finding links between individual learning and organisational practice have been 'hovering above' rather than getting engaged in the nitty gritty of how learning manifests and spreads itself out on the ground. And this brings me to my own approach, which to some extent resembles Nicolini's. I call it 'Learning Reach'.

2 Three case studies in search of 'Learning Reach'

Over the last ten years I have had the privilege of working closely with a company, Consalia, who has embraced the philosophy of work based learning by co-creating in partnership with the Institute for Work Based Learning a Masters in 'Sales Transformation'. Consalia works with some of the world's foremost organisations and have achieved a validated client sales performance improvement of over $6.75bn in six years. Their success they attribute largely to what they describe as a 'values-led "mind set" approach' which challenges much of how salespeople currently go about things.

This approach resulted from research their CEO, Philip Squire, carried out as part of his Doctorate in Professional Practice with Middlesex University which I had the privilege of supervising. The research challenged and questioned the traditional approach of selling as incentive led, product focused and target driven. Instead, Philip Squire found that the most effective selling could be traced to four key values: authenticity; client centricity; proactive creativity and tactful audacity (Squire 2009). These key values are at the heart of the 'mind set' which is now being shared with senior sales executives of international companies completing an MSC in Sales Transformation—validated by Middlesex University.

The programme comprises five accredited modules run by Consalia, after which the sales executives are supervised by Middlesex University staff who take them through an Advanced Practitioner Research module and a final project. A key focus of the Consalia modules is to encourage busy analytical sales executives to stand back and reflect on their practice. For all of them, this was a revelation.

While I was at Middlesex University, Philip Squire and I delivered two papers outlining the benefits of cooperation between academia and business (Critten and Squire 2011, 2012). Since retiring from the University in 2012 my role in the programme has been to second mark and moderate the projects produced at end of each of the five accredited modules. But I have also kept in close contact with former colleagues at the Institute for Work Based Learning and have read through the final projects completed at end of the programme. So

far I have monitored the work of some 48 students. I have spelt out my role in detail because, as I shall explore in the final section of this paper, I believe that I am in a unique position now to stand apart from the academic assessment process and focus wholly on what has always been my passion—demonstrating a link between individual learning and organisational practice.

Over the last two years I have also worked closely with international companies who have sponsored their sales executives to take the programme and, with support from Consalia's CEO, have explored ways in the words of Nicolini to trail 'connections on the ground, following people and artefacts as they move, chasing them wherever they go.' (Nicolini 2013 :239). Below I share the kind of interventions I have been engaged in with three companies who have sent sales executives onto the MSc Sales Transformation programme with a view to articulating just what are the 'connections' the executives have made/ are making between their learning from the programme and impact it is making/could make on their colleagues and ultimately on the organisations themselves. As stated above, the term I have coined to explain this phenomenon—which emerged from the second case study—is 'Learning Reach' (See Appendix 1).

My background has been in training/ HRD both in business (for 20 years) and then running HRD programmes at Middlesex University Business School (for another 20 years). In all that time I have been dismayed at the lack of interest in companies sponsoring training/development and following it up to 'evaluate' its outcomes. In fact my PhD explored just this challenge in formulating a new approach to 'evaluation' (Critten 1982) which was at the heart of a book published ten years later aimed at HRD Directors to encourage them to take a more active and strategic approach with their fellow directors to put a value on learning (Critten 1993). Sadly, so far, I have seen scant evidence of the active engagement I had been recommending—as the example of financial company not bothering to follow up managers' projects earlier in paper demonstrated.

Given this background, with Philip Squire's support I have sought to take an 'active' and facilitator role in mediating between students on the programme and their companies in helping make the connections.

Case Study 1: Creating a vision of what a cohort of senior sales executives are capable of delivering for their organisation

The first case study involved an International Computer Software company who was the first to sponsor 13 sales executives. What I want to share is an initiative I took, mediated by the CEO of Consalia when the executives were over half way through their programme. What I sought to do was help those who had sponsored the students 'visualise' what their sponsees were capable of achieving given the company allowed and created right condition for potentially 'connecting up the learning'.

Step 1: Raise level of expectations of management

The first stage was to send out to senior management a briefing report which began as follows

> 'Our ability to create new and better organizations is only limited by our imagination and collective will. Furthermore , language and words are the basic building blocks of social reality….As we talk to each other we are constructing the world we see and think about and as we change how we talk we are changing the world' (Bushe 2000 :100-101)
>
> Imagine an organisation where every member is connected to everyone else, with free access to draw on their respective knowledge and skills for the greater benefit of the organisation as a whole. That's what your managers on the MSc programme are aspiring to and can deliver. But they need help and that's what this briefing report is all about.
>
> 'The only way to achieve sustainable change is to link change to the values and beliefs of the individuals' It is our hope and belief that 'sustainable change' will be the ultimate benefit your organisation realises from the small wins your managers are beginning to demonstrate.

Step 2: Provide evidence of 'small wins' so far I summarise examples of impact I have extracted from the submitted work based learning projects so far. These are divided into different categories starting with evidence of commercial success as measured in financial gain, and then products, systems that have been produced as a result of projects and finally less tangible evidence of increased connections between departments, widening of networks etc.

Step 3: Focus back on the core group in cohort, akin to what Kotter calls a 'Guiding Coalition', (Kotter2012) as key agents for change

And finally I seek to focus their attention on what their managers are capable of achieving. Below is extract from briefing which follows up this theme

> The most valuable resources you have to initiate change are the managers attending the MSc programme. As the examples of 'small wins' demonstrate they are being equipped with the kind of capabilities they can draw on to bring about change and there is evidence of their bringing about change in their own teams. But to maximise the impact their initiatives need to be aligned across the organisation. Can you identify other teams/ departments who could benefit from what these managers have learned?

A starting point for a dialogue embracing the above parties might be for those who have completed the programme to collectively 'imagine' the kind of organisation that could best support and enhance the initiatives they have individually and collectively brought about. The stories they have told in the projects they have completed tell of their struggle with the dilemmas of balancing, on the one hand, the isolation of working within silos in a matrix organisation with the need to create a shared vision. They are in the best position to suggest what are the most appropriate structures, systems that could best support sustainable change in the future

In the case of this particular organisation, the structure and prevailing culture did not make it easy to follow up the initiatives suggested above. The cohort has all now successfully completed their masters. Time will tell if they can still 'align' what they have learned 'across the organisation'

Case Study 2: Intervention supported by the Sponsoring company to map out 'learning reach'

In this second case study, there was a direct link with the HRD Director of the company (International Mobile Phones) who was interested in the term I had now coined, 'Learning Reach'. I intervened at the point where they were just about to complete the final accredited module prior to being supervised by Middlesex University. In the same way as in above case study, I wanted to 'raise their expectations' as to what was achievable. I got permission to interview each one. In Appendix 1 is the briefing I sent prior to the interview

It was clear in interviews that they believed the changes they had experienced were also having an impact on others but, again, because of the diversity and complexity of the organisation, completion of my 'chart' (in Appendix) was not as straightforward as I had anticipated. I shared my thoughts with CEO of Consalia and HRD Director in a phone conference. They agreed to my sending a briefing note (see below) where I summed up the kind of impact they had reported, as a result of applying various tools, and how I hoped they would use final module to map out potential leverage of change on others

All of these tools are giving you the capability as a group of wider leverage and influence at higher levels 'up the ladder' and the potential to become 'a web of influence'. So, my suggestion is that [your company] might want to use them as criteria to evaluate influence and leadership. xxx might also want to consider how to support you as a group to realise that potential of becoming a 'web of influence'. A number of you commented that you wish you had the 'time' to share more your learning with others and one of you suggested that members of the Masters cohort be given responsibility for planning for a major project , like moving towards IOT.

These kinds of initiative help make the impact of the Masters more visible as would being able to map out how far your individual learning has reached, which brings us back to where we started. In a conference call earlier in the month between XXX, Philip Squire and myself it was suggested that each of you draw your own 'picture' of who you think has been influenced by your being on the Masters. The advantage of this over my trying to make sense of how you were having an influence within your own organisation charts would be that you would literally be mapping out your own 'webs of influence'. And it was decided that you carry out this exercise together on module 5.

> The way you 'map' out your zones of influence could take a number of forms. You could each create your own representation of who you think you've influenced and post it up to be compared with 'zones' of influence of others; you could draw 'lines' between yourself and a pre-selected list of stakeholders inside and outside the company' or you could simply draw lines between yourself and stakeholders you choose inside and outside the company. We could then see if there are certain stakeholders who are represented more than others. And it would be then for you, in the spirit of action research, to make sense of any emerging patterns and I would hope that you would all be able to use this evidence in your final project at Middlesex.

At the time of writing, the students have yet to submit their final project. I hope that there will be evidence of 'Learning Reach' but it will take some time to become integrated into their way of thinking. The exercise helped to connect up individual projects and hopefully that will increase capacity for cooperation and sharing of resources across the organisation.

Case Study 3: Creating a community of practice and extending learning reach into the public domain

This final case study is current and involves a rather different cohort of Sales Managers of SMEs who have been brought together to undertake the MSc by a Sales Director of another international company the products of which the SMEs are franchised to sell. All 12 managers have now graduated from the Masters and I have read all their final projects and identified two common themes under which I have proposed I help them write up their conclusions for a publication. Getting research findings from reflections on practice into the public domain I suggest is the ultimate learning reach.

Below is the proposal I have put forward to these 12 managers with the support of the Sales Director. It also reflects the opportunity for them (and myself) to build on their project recommendations using action research principles. From the first accredited module all students of this MSc have been introduced to and encouraged to use action research which, as far as I am concerned, is at the heart of work based learning requiring as it does a group

of inquirers to collaborate in reflecting on their own practice and come up with theories that will help improve their practice in the future. (McNiff 2010). I have to say, I am surprised that in all the theories Nicolini reviews there is not one reference to action research.

My hope is that in working together I can help them pick up their research where they left off in their individual projects. But now I would hope they could work together and create separate communities of practice and collectively evolve new theories which will improve the status and profession of selling which was behind the original research Philip Squire undertook. This is an extract from the note I have sent out to the managers to get their buy-in to the project. I have shared with them the work I have carried out before in large companies (See Case Studies 1 and 2) and noted that 'in the case of large organisations, despite individuals' commitment to change , the culture, structure of their respective companies often make it difficult if not impossible to implement the initiatives their projects have recommended. Whereas in their case, it is a different scenario.

My sense is that this Masters is different. Right from the beginning XXX (Sales Director) had a vision of bringing together SMEs into a community of learning and I have witnessed for myself how closely you guys have worked together and collaboratively and openly shared ideas rather than competitively protecting your own interests. I have also noted with some satisfaction that despite academia's attempts to dissuade you from going down an action research route, most of you declare you have tried to follow action research principles.

All of this gives me hope that you will not stop action researching after you have proudly stepped onto the stage Friday week to receive your well-deserved Masters certificate. And I also dare to hope that you will allow me to work with you to help put your recommendations into practice both in your own company as well as with each other to create the foundations of a new mind set of selling in SMEs.

I had a meeting with XXX (Sales Director) and Philip Squire today to explore ways we might collaborate. There are two initiatives I proposed which XXX and Philip endorsed.

The first is to create some form of publication which will celebrate your individual achievements as reflected in your projects by bringing them into the public domain. After reading all your projects I divided them into two broad groups:

•   Creating and Supporting an Optimum Environment within which Sales People can be Developed and Rewarded

•   Recognising and Rewarding Sales Performance that Delights Customers and Companies alike

I'm sure you can fit your project under one or maybe both these headings,

There would be an Introduction written by XXX, Philip and myself outlining the rationale behind the programme and in particular focusing on the appropriateness of these mindsets

for SMEs in a complex and changing world (drawing on many of your conclusions). And a final part which would look to the future and this would be the outcome of a second initiative I would like to propose.

In reading through your projects I made notes (37 pages in all!) of your findings and in particular the models/ theory emerging from your practice. For me this is what action research is about – the creation of theory from collaborative practice. Though most of you professed an allegiance to action research for various reasons I can understand that you weren't able to follow up in practice. What I'm suggesting to you is that I work with you individually and in groups to implement recommendations from your projects and in so doing recognise new theory that will emerge which will provide basis for our final chapter.

The above three case studies, though inconclusive, I hope give some clues as to how 'Learning Reach' can be pursued, like Nicolini's 'zooming' in and out. But it will not happen by itself. In the final section I will argue it needs a facilitator, which is the role I have adopted, to bring it all together and, in the tradition of action research create more cycles of action within which new theories of practice will emerge.

3   Recommendations for embedding WBL in organisational practice

I consider myself fortunate to be in a position where I have been able to mediate between individual learners and their sponsoring organisations, Consalia and Middlesex University. By drawing on the practice and theory shared in this paper I am suggesting ways below in which the respective partners can do more to encourage links between individual learning and organisational practice.

What the individual learner can do:

- Position their project within a wider context which anticipates consequences of actions being taken that have implications for and impact on others (See Case study 2)
- Actively seek out and encourage other colleagues to be involved in the research
- Create and sustain networks and expect to continue with research after WBL programme of study has been completed

What companies can do:

- Before the sponsored student begins course of study discuss context: agree who needs to be involved in research and how the student will feed back and follow up findings and what might be possible consequences and implications for the company
- Look upon work based learning as a strategic process for tackling company challenges as well as the means of acquiring academic accreditation. In Appendix 2 is

a framework I produced for an article Carol Costley and I prepared focusing on how WBL can be better integrated into business (Costley and Critten 2012). This reflects a cycle of questions and actions I engaged in with companies when introducing them to WBL. I always started with a challenge they were facing and we then explored how a core group could be brought together who could work collaboratively sharing good practice. At the same time the learning from the project could be accredited. If a company starts by seeing WBL in this way they are more likely to embrace findings and embed it into the way they do things

- After completion of course of study invite students to be involved in new company projects, initiatives and show relevance of skills/processes learned on the WBL programme of study have to wider range of problems.

What Professional Accrediting Bodies/Universities can do

- In assessment criteria include the need to show evidence of how learning has impacted on others
- Encourage students to pay attention to the 'context', i.e. what Nicolini refers to as 'relationships and associations that extend in both space and time and form a gigantic, intricate and evolving texture of dependencies and references' (Nicolini 2016: 229).
- Encourage students' manager/s to attend presentations of final project and be seen to focus on strategic implications
- Encourage students to explore the literature around organisation theory and practice covering the kind of theories reviewed previously

Given that work based learning began life in academia it is not surprising that the focus has been on 'theory' and academic accreditation. While recognising the enormous opportunities WBL has afforded people who otherwise would not have acquired academic qualifications I hope I have helped to balance the equation by focusing more on organisational consequences, which I feel have been neglected. In the model in Appendix 2 I have tried to show how theory and practice can co-exist to benefit both business and academia. I hope I have also pointed the way to how individuals, companies and accrediting institutions could do more to connect up individual learning and organisational practice. As Kurt Lewin, the founder of Action Research, wrote 'There's nothing more practical than a good theory' (Lewin 1952:169).

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APPENDIX 1

Dear   ……….

RESEARCH PROJECT EVALUATING THE 'LEARNING REACH' OF THE SALES TRANSFORMATION MSc

Over the last year I have had the privilege of seeing and commenting on the assignments you have carried out as part of the MSc Sales Transformation programme in the capacity of second assessor appointed by Consalia . I have been very impressed at how the respective modules have influenced your mind set and the potential impact this is having not only on you but also your team members and colleagues across the company,

As well as being the second assessor I have also a personal research interest in the impact this programme is having on your organisation. I am now an independent consultant but for many years worked at Middlesex University and had the privilege of being part of the team 20 years ago which established the formwork within which learning in he workplace could be assessed against academic criteria. And prior to leaving in 2012, in association with Consalia I helped to put together the programme you are currently working through.

But I am contacting you now, not as a consultant to Consalia or representative of Middlesex University but as an independent researcher who for many many years has had a vision for how individual learning can be seen to influence the strategy and future direction of an organisation. You are probably aware of authors like Peter Senge who, along with others, coined the term 'The Learning Organisation' (Senge 1990) unfortunately, in my opinion, no one has convincingly shown evidence of just how individual learning can be seen to impact on an organisation's strategy.

With your help I would like to follow up the learning you have clearly gained so far on the MSc programme and examine evidence of how it has had an impact on others. I have coined the phrase 'Learning Reach' to describe this process. Xxx has kindly agreed to my contacting everyone on the programme to invite you to participate in this research

Initially I would like up to an hour of your time to get a sense from you of who in your organisation (and indeed outside) you think the initiatives you've taken so far in the projects you've carried out have impacted in so far as you can detect a change in behaviour, or mind

set and whether there has been a measurable financial impact as a result. I have tried to summarise the first stage of this process of 'Learning Reach' on attached graphic.
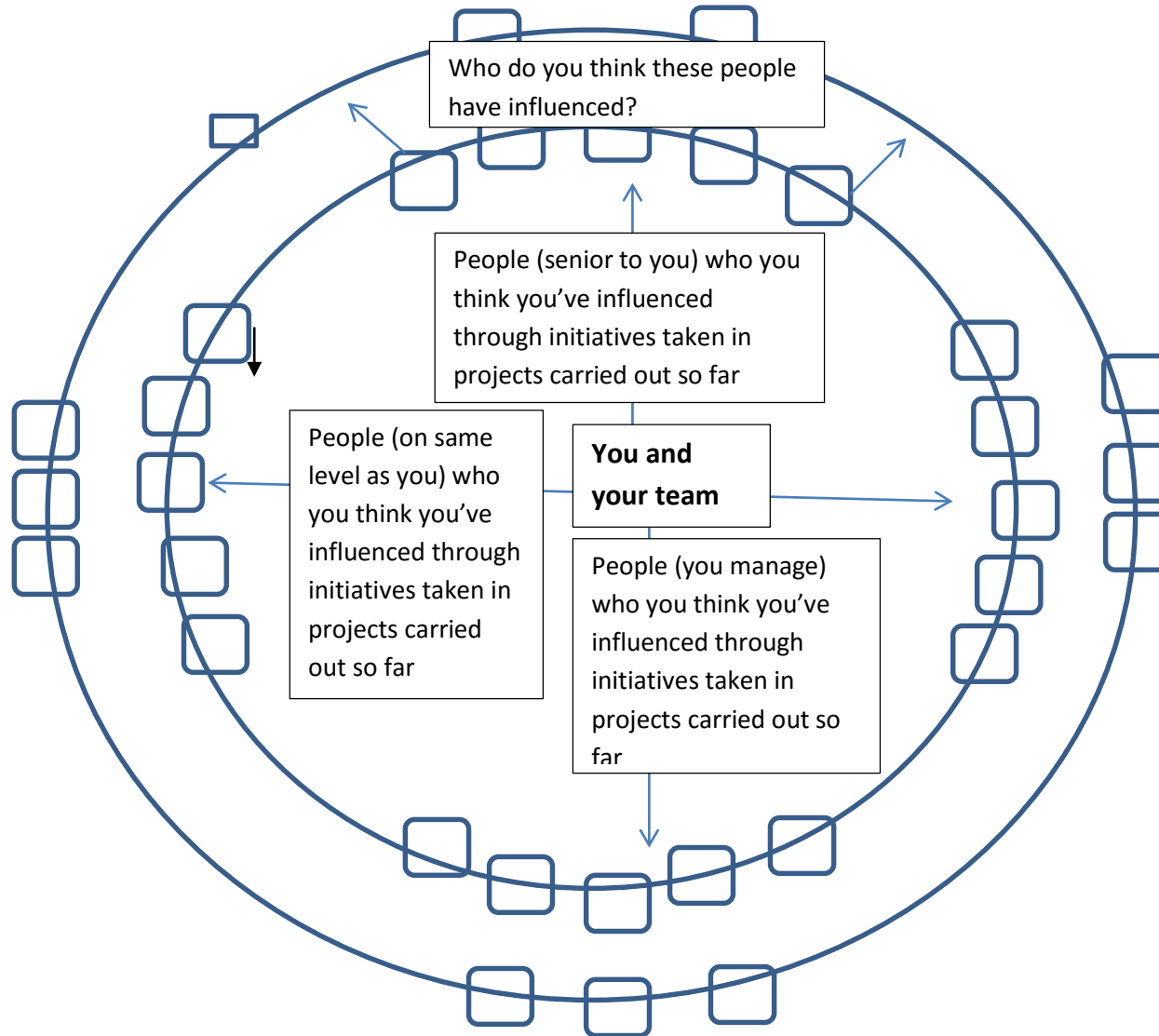
I'd like you to think of people in three categories: your team and/or those you manage; your colleagues and those in more senior positions. You will see that I would also like you to describe the nature of the influence and have suggested we might represent the kind of changes across the organisation according to a colour code. This could then help us represent extent and nature of change across the organisation. When everyone lights up green we'll know we've cracked the enigma of the so-called 'learning organisation' which your company could then justifiably call itself!

I've also indicated on attached that I'd like you to reflect on whether you think any of the people you've influenced have in their turn influenced others and how. This is really the start of phase two of the project where, with XXX's support, I'd like to contact those people you've identified and ask exactly the same kind of questions I've put to you. And so on until, potentially we can see evidence of what I would call 'traces' of influence across the organisation. But that's very much for the future. For now I would be very grateful if you could contact me if you're prepared to be part of this research

Ideally I would prefer a face-to face meeting but recognise that's probably logistically impossible. Next best thing might then be skype or phone conversation.

I would be delighted if you feel able to join me on this research journey. I will, of course, keep confidential your responses and will always get your permission to share data with others

Extent of Learning Reach within XXX

Who do you think these people have influenced?

People (senior to you) who you think you've influenced through initiatives taken in projects carried out so far

You and your team

People (on same level as you) who you think you've influenced through initiatives taken in projects carried out so far

People (you manage) who you think you've influenced through initiatives taken in projects carried out so far

Nature of influence/change you think has occurred which you can describe as

Blue	Led to change in mind set/attitude
Red	Led to change in behaviour
Green	Led to tangible outcome measurable in financial terms (increase in sales, reduction in costs etc.)

APPENDIX 2

BUSINESS MODE	ACADEMIC MODE

What is the most challenging issue company is facing? What evidence will tell us it is being tackled?

Who are the key staff - representing all sectors of the business - whose expertise we could draw on to bring about the kind of change we need?

BUSINESS -SUCCESS

What kind of projects might this group undertake individually and collectively which will provide evidence of the kind of change we need to see? How can they be enabled to pay attention to/ reflect on their practice to provide this evidence?

Group is enabled to reflect on and learn from practice using these kinds of processes:

- **Critical reflection**

- **Appreciative inquiry**

- **Individual and group exploration of their own ontology, epistemology, methodology for inquiring into their own practice**

What impact is learning from the core group having on their colleagues? Overall, what evidence can be generated to show the kind of changes in practice and principle that are emerging?

INDIVIDUALS ACQUIRE ACADEMIC RECOGNITION