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## Organizational Learning In Higher Education: Building Staff Capacity

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ORGANIZATIONAL LEARNING IN HIGHER EDUCATION: BUILDING STAFF  
CAPACITY

A Dissertation

Presented to the

The Faculty of the School of Education

The College of William and Mary in Virginia

In Partial Fulfillment

Of the Requirements for the Degree

Doctor of Philosophy

By

Rosanna Koppelman

June 2023

ORGANIZATIONAL LEARNING: BUILDING STAFF CAPACITY IN HIGHER  
EDUCATION

By

Rosanna Koppelman

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## **Dedication**

To my husband and children whose unending support has allowed me to be the woman I am today. To my parents, on whose shoulders I now stand. To my cousin whose doctoral studies in education inspired me.

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## **Abstract**

Organizational learning has been studied and researched as a construct for organizational improvement. Although its definitions are varied, scholars continue to integrate its use through various disciplinary approaches. It has been studied at the organizational level, but not as much research has taken place at the individual level where day-to-day activities and tasks of the university take place. The goal of this study was therefore to understand the organizational learning processes individuals use in their day-to-day work. This phenomenological study sought to understand the specific activities or tasks individuals perform to acquire, share, and use knowledge throughout the organization. The research question that guided the study was, how do university administrative staff learn how to do their jobs? To answer this question, I generated data from 10 administrative staff by conducting in-depth semi-structured interviews. Their collective experience revealed that they learn how to do their jobs primarily by trial and error. Additionally, they learn through informal networks they have developed with colleagues in similar roles. Use of prior work experience to inform their new roles and access different types of training to acquire new skills. In summary, these findings offer strong support for this study's organizational learning and workplace learning conceptual framework. The study also fills a gap in the literature on organizational learning among university staff that offers policy makers, institutional leadership, and management and educational researcher's insight into how knowledge is acquired, shared, and used among university staff.

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## **CHAPTER 1**

### **INTRODUCTION**

Scholars and practitioners in management, organizational behavior, education, and the social sciences have strongly supported the importance of learning within organizations and learning by organizations (Argote & Miron-Spektor, 2011; Cho et al., 2010; Leavitt, 2011; Palos & Veres Stancovici, 2016). The knowledge created from such learning is frequently linked to organizational performance, institutional effectiveness, competitive advantage, and organizational renewal among other organizational themes (Drucker, 2004; Rizova, 2007; Schwandt & Marquardt, 2000; Senge, 2006). Today's highly competitive economic environment has brought about a new organizational reality that is complex and ever-changing. Institutions of higher education are no exception to these changes and face intense competition in both the public and private education sectors (Musselin, 2018; Patel, 2019). Multiple factors such as shifts in student composition due to an increase in non-traditional students, shrinking federal and state dollars, and alternative delivery styles such as online and hybrid learning configurations, are just a few of the challenges facing administrators (Capranos et al., 2023; Harris, 2022; Musselin, 2018; Patel, 2019).

On a societal level, diminishing trust in the institution's ability to provide educational outcomes that increase employability among its graduates are also looming and conversely a new rise in alternative credentials such as non-degree certificates and badges creates competition (Musselin, 2018; Patel, 2019; Sandeen, 2013). As a result of these and other factors, institutions of higher education must continuously transform the way they work and learn to remain

competitive and financially viable in the marketplace (Drucker, 2004; Schwandt & Marquardt, 2000; Senge, 2000). Although there are varying degrees of its promise and impact, support for organizational learning is seen as an important ingredient toward driving innovation, adaptability and being able to quickly respond to industry and market changes (Cho et al., 2010; Drucker, 2004).

Colleges and universities share organizational similarities with their for-profit and non-profit industry counterparts; however, there are certain distinctions that set them apart and require different approaches to developing individual knowledge acquisition, knowledge development and knowledge sharing. For instance, for-profit companies use business models designed to measure goods and services that are sold to calculate their profits, whereas in the broadest of applications, higher education does not seek “profits,” rather success is measured in terms of the long-term public perception of goodwill of the institution (Herrera, 2007). In this sense, goodwill is conceptualized as the abiding, yet invisible result of the effectiveness of the organization over time and its educational contributions to society (Herrera, 2007). And although colleges and universities have missions that promote learning and development among students, they rarely use organizational learning constructs and practices as a method to evaluate and improve the institution (Bess & Dee, 2012; Kezar, 2005).

As intense pressure to perform continues, exploration of organizational learning as a construct to achieve better and improved outcomes at both the individual and organizational levels of learning provide a leveraging strategy in times of change. However, many organizations, in particular institutions of higher education, have failed to recognize a basic truth about organizational viability—which is, that for an organization to continuously improve, it must maintain a commitment to learning (Senge, 2006).

Bittner (1965) described an organization as a group of fixed people associated together and engaged in organized activities to attain a specific objective. This concept of an organization emphasizes the role of people working together for a common goal. Bess and Dee (2012) described the organization as a human system comprised of individuals in pursuit of a common goal they achieve together and sometimes individually. They further suggested that individuals in a work organization achieve their goals through goal-orientated roles (Bess & Dee, 2012). In another approach to understanding organizations, Morgan (1986) contended that organizations are information systems that communicate and make decisions. Together, these authors described the organization as a system comprised of individuals associated together to achieve a common goal. This conceptualization serves as the basis for organizational learning, and the transfer of knowledge throughout, is the basis for examining and analyzing many organizational learning constructs.

My study of organizational learning among staff at a small public institution of higher education sought to understand the organizational learning processes individuals use in their day-to-day work at an organization of higher education. Scant research exists on the role of staff in advancing organizational efficiencies or learning processes among staff personnel (Graham, 2012). Additionally, I sought to further understand within the organizational learning construct, the specific activities or tasks individuals perform to acquire, share, and use knowledge throughout the organization.

### **Conceptual Framework**

Many constructs, and conceptual frameworks of organizational learning exist, but the prevailing view of organizational learning is underscored by an emphasis on adaptability (Dill, 1999). It is through adaptability that change occurs (Leavitt, 2011). For example, Senge's (2006)



model of organizational learning requires organizations to adopt new ways of understanding their customers and new ways of exploring and managing the business. In Garvin's (1993) model of organizational learning, there is a reference to the process through which organizations create, acquire, and transfer existing or new knowledge to develop new and different ideas, as well as change from previous ideas. Dill (1999) further focuses on the element of adaptation and describes organizational learning as a process by which the entire organization must be receptive and ready to use new knowledge to improve core processes. Schwandt and Marquardt (2000) conceptualized organizational learning as a system of actions, individuals, symbols, and processes that enable an organization to change information into knowledge which leads to "adaptive capacity" (p. 43). In each construct, adaptability is central to how organizational learning is conceptualized and further underscores the importance of and the role of change as a key feature of many organizational learning constructs.

In addition to the element of change, other constructs of organizational learning include how organizational learning is facilitated and through what processes or mechanisms knowledge is shared. Organizational sociologist Rizova (2007) stated that organizational learning is a construct of processes that are necessary for the creation, retention, and transfer of knowledge in organizations. For example, some organizations use a mechanism of shared learning through communities of practice (Lave & Wenger, 1999) to share and transfer knowledge. Communities of practice are a group of people who engage on an ongoing basis with a common endeavor and similar topic (Lave & Wenger, 1999). Many communities of practice are informal and develop organically within an organization (Eckert, 2006). Brown and Duguid (1991) posit that in many cases it is the informal practices of the organization that determine its success or failure.

Communities of practice are grounded in social learning theory and capitalize on the diversity of experience within the group (Lave & Wenger, 1999). Other organizational learning constructs include not just the creation of knowledge but also the recreation of knowledge as part of their construct (Crossan et al., 1999). This knowledge becomes a shared knowledge base for guiding and shaping experiences at both the individual and group levels of the organization. Models such as these incorporate not just the individual learning knowledge creation but also the social aspects of organizational learning toward adaptability (Crossan et al., 1999). As one moves from understanding the value of organizational learning and its implications for today's competitive environment, the brain metaphor of organizations (Morgan, 1986), and how organizations develop, process, and transfer knowledge provides a clearer understanding of the value of the multi-faceted aspects of the phenomenon of organizational learning.

As an organizational construct, organizational learning draws from organizational theory and is used in many disciplines including education, business management, sociology, and psychology (Crossan et al., 1999; Morgan, 1986). Author and leading organizational theorist Senge (2006) emphasized that the most successful organizations are those that can learn faster than their competitors, and in so doing, are organizations that will achieve competitive advantage. Other theorists such as Drucker (2004), considered the father of management science, and Hamel (2007), known for extensive writing in business management, have both made similar declarations in support of organizational learning as critical for establishing and maintaining competitive advantage in the marketplace (Loermans, 2002).

There is no one-size-fits-all model when it comes to organizational learning. Several factors should be considered when examining organizational learning such as culture, structure, and climate (Blackwell & Blackmore, 2003). All are important elements in an organization's

ability to learn and adapt to changes in the environment that produce individual and team capabilities toward innovation, problem-solving and creativity (Reese, 2019). A key and important outcome of organizational learning is the element of adaptability and being able to quickly pivot during times of uncertainty, disruption, and change (Blackwell & Blackmore, 2003; Senge, 2006). This aspect of organizational learning must be woven into the everyday work of people in the institution and delivered between individuals, teams, and systems throughout the organization (Senge, 2000).

### *Learning Theories/Typologies*

Moving from the analysis of organizational learning concepts and models to the learning lens offers a perspective into organizational learning from the learning theory perspective. As mentioned earlier, organizations are complex arrangements of people in which various types of learning take place at the individual, group, and organizational levels (Nevis et al., 1995). Thus, understanding organizational learning and the various ways in which learning is experienced and how individuals contribute to, and advance organizational learning should be explored (Kim, 1993). To make an impact on organizational outcomes, an examination of several aspects of learning should be considered. Most importantly, how, where, and what mechanisms are in place to transfer learning should all be evaluated to ensure the best practices are being implemented.

Four primary learning theories, sometimes referred to as learning processes, help organize individual and group learning that occurs in organizations. They include experiential, adaptive and generative, and assimilation theory (Chiva & Habib, 2015; Fiol & Lyles, 1985; Huber, 1991; Leavitt, 2011). Kolb's (1984) experiential learning theory is conceptualized as a process in which the learner proceeds through a series of concrete activities through experiencing, reflecting, thinking, and acting. Second is the learning theory that focuses on

adaptive and generative learning (Leavitt, 2011). As the word implies, adaptive learning facilitates learning that allows organizations to adapt to environmental factors. It leads to developing knowledge in new ways or adding to existing knowledge in response to a stimulus (Senge, 2006). Generative learning, however, is less of a responsive approach but rather exploratory, in that it looks for ways to understand customers or ways to better manage the business (Senge, 2006). Generative learning fosters a continuous learning culture through innovation, creativity, and anticipating change (Senge, 2006). Both adaptive and generative learning are necessary for organizations to be prepared to respond to transformational change efforts and to maintain competitive advantage. Both types of learning are critical from the system perspective because they force organizations to be “continually expanding their ability to create their future” (Senge, 2006, p. 14). Lueddeke (1999) argued that adaptive and generative learning can be helpful in managing the introduction of academic change in institutions of higher education. He added that a strength of this learning typology is its ability to help decision-makers identify concerns and engage one another in reflecting on the challenges of a specific reform, initiative, or innovation (Lueddeke, 1999). Other scholars, such as de Geus (1997), who described organizational learning as a living organism much like Morgan (1986), also see the importance of adaptive learning practices as a requirement for organizations. He places special emphasis on the strength of this typology to give organizations the ability to adapt to any changes in social and economic conditions of the market environment (de Geus, 1997).

The fourth learning theory used to frame organizational learning is assimilation learning theory (Ausubel, 2000; Seel, 2012). Developed by Ausubel (2000) in the early 1960s, assimilation learning theory asserts that when new learning experiences occur, they are

integrated into preexisting knowledge bases. This form of learning is also a key pillar of adult learning theory (Knowles, 1970).

While learning at the institutional level is important, learning at the individual level is equally, if not more important. Theorists Argyris and Schön (1978) developed one of the most popular organizational learning theories in the field of organizational studies. They conceptualized organizations as a living, learning entity in which learning at the individual level occurs through a two-step process they called single-loop learning and double-loop learning. Single-loop learning occurs when individuals change their actions or behaviors based on what is expected, without receiving meaningful feedback (Argyris & Schön, 1978). For example, an individual who changes behavior based on departmental rules, now knows that their previous action was not correct. Their change in behavior is based on a reaction to a policy or rule that governs the day-to-day operations of that department. A more basic understanding is the classic example of a thermostat that is set at one temperature. When the room temperature falls below or above the set temperature on the thermostat, the thermostat is activated. By contrast, double-loop learning focuses on the actions of single-loop learning and includes further assessment of this action by exploring the policies, plans, and operational assumptions under which the single-loop learning occurred (Argyris & Schön, 1978). This form of learning challenges the individual to think more deeply about their own assumptions and beliefs (Senge, 1999). To further explain with the same example, instead of setting the thermostat at the same setting for everyone in the room, the thermostat is adjusted to meet the needs of the people in the room. The connection between Senge's (2006) adaptive and generative learning and Argyris and Schön's (1978) single-loop and double-loop learning bear a striking resemblance. Single-loop learning in most cases

uses the adaptive learning process, whereas double-loop learning uses the generative process for learning (Leavitt, 2011).

Several conceptual models of organizational learning have been developed from these four primary learning theories. Building on Kolb's (1984) experiential learning theory, Huber (1991) developed a four-part conceptual model of organizational learning processes that includes knowledge acquisition, information distribution, information interpretation, and organizational memory. Similarly, researchers Nevis et al. (1995) developed a three-stage model of the learning process that will be used as the theoretical framework for this research study. Their model includes knowledge acquisition, knowledge sharing, and knowledge utilization (Nevis et al., 1995). Here, each stage of the framework supports learning within the organization to facilitate organizational adaptability and to promote the innovation and creativity necessary for competitive advantage and responses to market changes (Drucker, 2004). The Nevis et al. (1995) model has a behavioral orientation and emphasizes action-based learning that is commonly connected to performance at the individual level (Leavitt, 2011).

Thus far, multiple perspectives have been presented that conceptualize organizations as information processing systems (Morgan, 1986) that process information and develop learning through experiential, adaptive, generative and assimilation methods (Leavitt, 2011). And in so doing, this new knowledge is transferred throughout the organization. This system of learning throughout the organization is how organizational learning is experienced at the individual, group, and institutional/organizational levels of the organization.

### ***Organizations as Systems***

With this foundational understanding of various organizational learning constructs, Senge's (2006) fifth discipline, which involves systems thinking, emphasizes the importance of

understanding organizations as a set of interconnected systems, or subsystems, which are linked together to bring about certain outcomes for the organization (Senge, 2006). This understanding of organizations draws attention to the relationship and interconnectedness necessary for organizational learning to be effective and supported (Senge, 2006). Senge (2006) further posits that the fundamental learning unit in an organization are teams that work together. A team is comprised of individuals who rely on each other to produce a particular outcome (Senge, 2006).

Conceptualizing organizations as systems with interrelated, interconnected, and interactive components illustrates the relationships between components that facilitate the transfer of information and knowledge. Other organizational characteristics that connect to systems thinking, the extent to which these components are loosely or tightly coupled (Bess & Dee, 2012; Weick, 2000). The concept of coupling refers to the degree of interdependency and responsiveness between the components within a system and can therefore determine the impact on other components of the system (Bess & Dee, 2012; Weick, 2000). More specifically, components of a system that operate independently with only some degree of responsiveness to each other would be considered loosely coupled. Alternatively, components of the system that have a higher degree of responsiveness to each other, would be considered tightly coupled (Weick, 2000). This range or degree of responsiveness between components and the activities they share offers insight as to the organization's preparedness to successfully promote organizational learning (Leavitt, 2011). Loosely coupled systems are also closely associated with decentralized organizations and likewise, tightly coupled systems are associated with organizations that are centralized (Weick, 2000). These organizational design elements can impact the rate at which learning takes place within the organization. These characteristics are

quite common in universities and college structures, which are comprised of individual academic units that sit within the larger university system.

In addition to these types of structural elements, Gould et al. (1993) advanced the study of the phenomenon with the introduction of what they called, facilitating factors, for organizational learning. They are the first scholars to explore the specific areas within an organization where organizational learning should be occurring for maximum effect (Gould et al., 1993). And although they are not included as a contributing focal point of this research study, they do provide insight for practitioners who want to operationalize organizational learning in key business areas. A few of the factors include: (a) measuring performance and identifying potential skill gaps, (b) market scanning to learn about successes in the industry, (c) leadership involvement which emphasizes the critical role of leadership in implementing a vision and mission for the organization, and (d) the promotion of continuous learning, which demonstrates a commitment to learning (Gould et al., 1993). And once again, the effectiveness of these factors can depend on how the organization is structured.

It is often a misconception that the industry of higher education is best suited for organizational learning practices given its mission of providing education (Reese, 2017). Consider for a moment the mission of most institutions of higher education as a production cycle that impacts students, the product, throughout the student experience. Here, the college is a place where students are immersed in an environment that is designed for them to learn. In another component of the cycle, faculty conduct research that produces knowledge that is transferred to students and others in the educational community. And last, administrators are focused on supporting students, developing new and innovative curricula, policies, and student experiences



that advance student success. These various components would require organizational and individual level learning, to advance institutional effectiveness and operational improvements.

Organizational learning as defined in this chapter includes an interactive process that occurs at the individual and institutional level and relies on a shared knowledge between components, which guides behavior, shapes meaning and experience, within the organizational system (Crossan et al., 1999). Similar to corporate structures, leaders of institutions of higher education, from staff managers to high-level administrators, can benefit from many of the concepts and practices outlined in organizational learning theories and frameworks (Dee & Leisyte, 2017).

### **Significance of the Study**

To further support the importance of organizational learning and value, Gallup, a leading advisory and consulting firm, reported that one of the top attributes of an organization that keeps employees engaged at work is a company's ability to create a culture of growth through learning and development (Desimone, 2019). They add that the ongoing engagement of personnel is also a key factor for retention of new employees (Desimone, 2019). This underscores again, organizational learning and the rate at which organizations implement or practice behaviors that facilitate organizational learning, are imperative for operational improvement and effectiveness (Blackwell & Blackmore, 2003).

The emphasis on organizational learning for this research study is constructed and organized around individual staff learning, in which learning, its type (formal or informal), and the process used by staff to facilitate learning were examined. Additionally, the study examined the experiences, activities, tasks, and processes by which knowledge is acquired, shared, and used to satisfy job duties and the processes used by staff to facilitate this learning. Senge (1990)

asserts that organizational learning may be the only source of sustainable competitive advantage (Kendrick, 2019). With this assertion, understanding the way in which individuals learn and acquire knowledge that is then shared and eventually utilized throughout the organization, and how this occurs, must be examined to improve operations.

Today's higher education system faces many pressures—chief among them is an ongoing competition to outperform peer institutions by attracting and competing for students (Farish, 2018). Additional challenges stem from heightened expectations to produce students that can obtain good jobs upon graduation (Musselin, 2018). Increased federal oversight, affordability, and accountability, particularly among public institutions is front and center during many administrative leadership conversations (Harman et al., 2010). Within an economic model, colleges and universities add value to human capital needs and the knowledge economy by directly supporting multiple industries around the globe (Farish, 2018).

Higher Education is not impervious to competition. Webber (2018) said, “a competitive world requires a competitive marketplace of expertise, for only good markets can make for good democracy” (p. 12). As a formal organization comprised of complex social systems, and competing organizational interests designed to meet specific goals and mission, organizational learning within higher education, at the staff level has not gained much consideration nor research. (Liptak, 2019). Yet, little is known about how college staff members learn when new on the job. Understanding how this critical group of employees builds knowledge through learning to advance institutional effectiveness for the university is imperative because they provide a critical link in organizational learning in the sector.

## **Problem Statement**

University staff are arguably the richest resource of any college or university (Graham, 2012). However, research that examines how learning among staff occurs and items that facilitate and challenge staff learning are scant. Typically, research studies on organizational learning within institutions of higher education focus on how it is implemented at the organization system level and not the individual level (Voolaid & Ehkrlich, 2017). Additionally, when organizational learning at the individual level is examined, it is typically done so through the lens of organizational culture and job satisfaction among support staff (Moradi et al., 2013). Further, research by faculty within the university typically focuses on those areas which promote the university as a brand, or research areas for which faculty are interested in researching (Say, 2019). Recently, new and growing discourse among staff about their professional practices and the contributions they make toward institutional effectiveness and the business of education has begun to surface (Graham, 2012). University staff have a great deal of knowledge and skills. Collectively, they are a primary component of a university's ability to function properly (Graham, 2012; Say, 2019). Their role in problem-solving and innovation to advance institutional effectiveness is not well researched. Conducting this research will illuminate the capacity this segment of the workforce can provide toward strengthening institutional effectiveness and readiness for organizational learning in the entire system.

Academic institutions are faced with exploiting and leveraging knowledge in new and innovative ways given today's rapidly changing environment, the emergence of new online educational models and globalization of higher education. Based on the application of the organizational learning theories introduced here in this chapter, and the environmental reality facing institutions of higher education, this research study conceptualized a model that links

organizational learning to institutional effectiveness and improved performance. The focus on staff in this research study provided a unique lens into how learning occurs, and knowledge is built for staff members within various academic units of higher education. The primary research question for this study was: How do administrative staff learn how to do their jobs (based on their perceptions)?

I used two theoretical frameworks for this study. The first is Nevis et al.'s (1995) organizational learning three-stage theory; and second, Tynjälä's (2008) workplace learning framework. Both were used to understand the specific activities, methods, and/or behaviors administrative staff use as they described how they learned to do the work/tasks required along the three stages. I further sought to understand what, if any, specific sources, or mechanisms (be they formal or informal) staff use in their development or advancement of learning how to do their jobs.

Using the Nevis et al. (1995) theoretical framework, this study examined how knowledge among administrative support staff is acquired at the individual level, how knowledge is shared with others within the organization, and how administrative support staff use knowledge. Additionally, this research study investigated the relationship between organizational learning practices and their impact on operational effectiveness—an evaluative process designed to measure achievements and outcomes as it relates to the institution's mission.

### **Research Questions**

The following research questions guided this study to understand how administrative staff learn how to do their jobs:

1. What aspects of the job did staff members feel prepared to do when starting their job?

- a. To what degree did they feel they had the requisite knowledge needed to complete the day-to-day duties of their position?
  - b. If they did not feel prepared, where did they go or what did they do to learn the knowledge needed for their position or task?
2. What type of knowledge sharing (formal or informal) mechanism(s) are in place to facilitate knowledge sharing for staff, if any?
  - a. How is new knowledge integrated and/or shared by the individual with others?
  - b. How is this new knowledge that is developed at the group level shared throughout the academic unit, department, or program?
3. What informs the development of staff learning?
  - a. How do internal interactions and training help support individual learning?
  - b. How do external interactions and training help support individual learning?

### **Definition of Terms**

The following terms used in this study are defined below. Where applicable, it is noted if any of the terms are used interchangeably.

- *Adult learning* – the process of teaching and educating adults (Merriam & Bierema, 2014).
- *Learning system* – the combination or collection of activities, processes and experiences that function together based on a variety of factors to include culture, experience, values and culture (Nevis et al., 1995).
- *Organizational learning* - an element of organization theory that occurs when knowledge systematically alters behavior and is integrated into organizational

structures for improved performance (Senge, 2006). An interactive process that creates and recreates a shared knowledge base, which guides behavior, shapes meaning and experience, and institutionalizes learning that occurs at the individual and group levels (Crossan et al., 1999).

- *Organizational theory* – an approach to organizational analysis (Morgan, 1986).
- *Professional development*- the acquisition of knowledge, skill, or attitude that prepares people for new directions or responsibilities (Association for Talent Development, 2020).
- *Systems thinking* - a conceptual framework used for problem-solving that considers problems in their entirety by identifying patterns to enhance the understanding of and responsiveness to problems (Rubenstein-Montano et al., 2001). Additionally, systems thinking explores relationships between various parts of the systems. In this paper, I used the term *systems* to refer to the components that make up the organization. For example, a system could be a department within an organization.
- *Training* – a formal process by which talent development professionals help individuals improve performance at work (Association for Talent Development, 2020).
- *Workplace learning* – individual learning in the environment of work and workplaces, where a deliberate and conscious learning activity by way of reflection on actual workplace experience(s) is involved (Elkjaer & Wahlgren, 2005).

## **Summary**

In modern organizations, the need for organizational learning is essential for adaptability, creativity, and innovation (Senge, 2006). As market trends in higher education continue to

evolve, colleges and universities must maintain a workforce that is adept in organizational learning practices. Cultivating and encouraging learning must be a priority because it contributes to helping organizations maintain competitive advantage and increased performance (Harris, 2022; Leavitt, 2011). Organizational learning at the individual level is the first point of contact for learning within the organization. Learning theories of experiential, adaptive, generative, and assimilation, which include cognitive and behavioral approaches, combine patterns of thinking plus action (Senge, 2006).

Isaacs (1993) emphasizes the importance of individual learning to develop one's capacity to think and act collaboratively as a key element of organizational learning (Leavitt, 2010). However, Senge (2006) focused instead on the macro level of organizational learning and insisted that organizational learning may be the only source of sustainable competitive advantage. Overall, the literature on organizational learning is consistent in its agreement that organizations who practice and cultivate organizational learning practices are superior in market and financial performance than many of their competitors. As such, organizational learning is a well-suited construct and practice for colleges and universities that want to establish a more proactive market positioning versus a reactive one.

The Nevis et al. (1995) organizational learning model relies on practical behavioral actions to facilitate the stages of knowledge sharing, knowledge utilization and knowledge utilization at the individual level (Leavitt, 2011). The adaptive nature of organizational learning and knowledge development processes allows staff to develop knowledge that can be shared in multiple ways throughout the college or university. As knowledge is shared and used, it increases the opportunity for enhanced performance among staff, and strengthened capabilities across departments and academic units within the institution. I sought to fill the gap in the literature

about how staff learn how to do their jobs and how their learning helps contribute to organizational learning and knowledge building within higher education.



## CHAPTER 2

### REVIEW OF LITERATURE

Numerous scholars have contributed to our understanding of organizational learning and the various interpretations of its meaning. From these interpretations, two primary approaches serve as the basis for its analysis and exploration. The first is organizational learning that occurs at the institutional level, which examines specific practices used to advance learning for the organization as a whole system (Argote, 2011; Senge, 1999). The second, is an approach to organizational learning at the individual level, which examines the process of learning by individuals and the specific practices they use to learn within the organizational setting (Tseng & McLean, 2008). Both approaches operate on the assertion that learning can and does occur within organizations and that from both approaches, knowledge is created, shared, and utilized to benefit the organization for improvement of organizational effectiveness and individual performance outcomes (Tseng & McLean, 2008).

Central to these two approaches, is the question of what comprises learning in organizations and whether it is solely cognitive, such as gaining new information or insights; or, if it is only behavioral, such as a change in action from an experience or an adaptation from previous knowledge (Bapuji & Crossan, 2004; Scott, 2011). Scholars Fiol and Lyles (1985) argued learning in organizations is both cognitive and behavioral. However, they associate learning in organizations as primarily cognitive, with behavioral characteristics occurring to a lesser degree when an adaptation in behavior occurs (Bapuji & Crossan, 2004; Scott, 2011). They further added that learning is comprised of three components, the development of insights,

knowledge, and the associations one has through both past and present actions that influence their behavior through adaptation. Similarly, other scholars focus on learning as being a multi-faceted process where participants collectively and individually acquire knowledge as they act and reflect together (Scott, 2011). Considering both the cognitive and behavioral approaches, learning is central to acquiring knowledge, the cognitive aspect, and to changes in action that facilitates knowledge transfer and the behavioral aspect of knowledge utilization (Bapuji & Crossan, 2004; Leavitt, 2011; Nevis et al., 1995; Scott, 2011).

This literature review provides an overview of how multiple theorists approach organizational learning. It compares theoretical frameworks, approaches, and forms of learning within the context of the cognitive and behavioral schools of thought. Further, this review addresses how organizational learning is conceptualized within the workplace as a learning process that leads to a change in action or behavior (Nevis et al., 1995). Moreover, it provides an overview of the two theoretical frameworks used in this study. One, developed by Nevis et al. (1995), which characterizes the learning process within organizations in three stages: (a) *knowledge acquisition*, which consists of the development or creation of skills, insights and relationships; (b) *knowledge sharing*, which focuses on the sharing of the information that is learned; and (c) *knowledge utilization*, which consists of the integration of learning that makes it available throughout the organization and available for application to new situations. And the second framework, developed by Tynjälä's (2008), outlines seven task-specific behaviors or methods of how individuals learn at work. It includes: (a) learning by doing the job itself; (b) learning through co-operating and interacting with colleagues; (c) learning through working with clients; (d) learning by tackling challenging and new tasks; (e) learning by reflecting on and evaluating one's work experiences; (f) learning through formal education; and (g) through extra-

work contexts. Both frameworks help organize the literature review and analyze distinctions and similarities between organizational learning theories and their corresponding frameworks when examining different learning processes.

### **The Learning Organization**

Literature on the meaning of both organizational learning and the learning organization overlap. Consequently, some authors use the terms interchangeably and misuse of terminology and meaning can occur (Örtenbland, 2001). Separate from the semantic positioning of words, the two concepts examine the concept of learning within organizations from both a macro or systems approach, and a micro, or individual approach. From the micro approach, organizational learning focuses on the collection and analysis of the “process of learning” for individuals located within the organization (Easterby-Smith et al., 1999; Garvin, 1993; Tseng & McLean, 2008). Thus, the steps one takes to learn in a work setting, or the type of learning one demonstrates to acquire knowledge within the workplace environment (including team learning) helps advance the organization. Further examination of organizational learning as it applies to the individual learner occurs in more depth later in this chapter. By contrast, the learning organization focuses on a collective set of practices or evaluative tools that are used in an organization to advance capabilities for continuous improvement and adaptation to environmental factors (Garvin, 1993; Nonaka, 1991; Örtenblad, 2001; Senge, 2006; Tseng & McLean, 2008).

Garvin (1993) approaches organizational learning from a management science orientation and argues that a learning organization is an organization that is skilled at developing, acquiring, and transferring knowledge that modifies its behavior to reflect the new knowledge and insights it has gained. Similar to other management constructs such as Total Quality Management, Six

Sigma, or Lean Management (Garvin, 1993; Senge, 2006), the approach is from a systems perspective rather than an individual one.

Many scholars have paved the way for modern approaches to the learning organization, however, Senge (2006) remains one of the most influential authors and scholars on the topic (Örtenblad, 2020). Senge (2006) is credited with popularizing the concept of the learning organization. He described his understanding of the learning organization from an organizational perspective placing emphasis on the fact that the organization is comprised of interconnected sub-systems that work together to store organizational knowledge and adapt to environmental changes in the marketplace (Senge, 2006). This understanding further connects the concept to the criticality of competitive advantage and organizational sustainability (Garvin, 1993). In Senge's (2006) book, *The Fifth Discipline*, he stated that a learning organization is one in which individuals are continually expanding their knowledge capacity and learning to innovate and create together. He outlined five ingredients, or *disciplines*, of a learning organization as containing and practicing: personal mastery, mental models, shared vision, team learning, and systems thinking. When practiced together, these facets create the conditions for an effective learning organization (Garvin, 1993).

To further define each of the five disciplines, personal mastery looks at how an individual reflects honestly to understand their capacity to learn and aim for a higher level of proficiency. According to Senge (2006), personal mastery must start with each member of the organization taking responsibility for their own individual learning and evaluating how their contributions advance improvement for the organization. The second discipline, mental models, is described as the deeply held beliefs, assumptions or biases an individual may have, that unintentionally shape how they see the world. The third discipline is building a shared vision. This involves creating a

goal or destination that is shared and collectively agreed upon to garner true commitment from members (Senge, 2006). The fourth component is team learning, which according to Senge (2006), is fundamental to how the organization increases its overall capacity for learning. Team learning includes continuous dialogue, where individuals are thinking and collaborating to generate new ideas for the organization. And the last discipline, the fifth discipline, is systems thinking. This discipline is the component of the construct of learning organizations that relies on the other four components for learning to be actualized.

Systems thinking is the practice of seeing the entire organization as a whole and not as individual departments or units (Senge, 2006). Senge's (2006) learning organization construct was one of the first to describe the organizational characteristics necessary to maintain a learning organization (Garvin, 1993). Because organizations work as interconnected systems, decisions that are made in one part of the institution have implications for other parts (Senge, 2006; Weick, 1976). But some scholars believe Senge's (2006) learning organization construct is too philosophical and abstract and does not offer specific steps to achieve the status of being a learning organization (Nonaka, 1991). Thus, some management scholars challenged Senge's (2006) notion of the learning organization and began to seek a different construct that would help organizations achieve the goals sought to improve knowledge sharing and reflection that are easy to understand, implement and most importantly, measure (Garvin, 1993).

Management scholar Garvin (1993) emphasized the importance of organizational improvement as central to the learning organization. Garvin (1993) defined the learning organization as one that is skilled at creating, acquiring, transferring knowledge, and adjusting its actions to reflect new knowledge and insights. Fundamental to this definition are the adjustments or changes in the way work is accomplished in the organization to facilitate and foster

improvement. Further, Garvin (1993) emphasized that a learning organization definition is one that is easy to understand with clear guidelines for the concept in practice. As such, his definition of organizational learning outlined operational directions and tools for measuring the organization's rate of progress to identify where learning gains have been made relative to what still needs to be improved and where growth is still required (Garvin, 1993). With a focus on organizational improvement as the primary goal of the learning organization, Garvin's (1993) primary criticism of Senge's (2006) construct and other similar learning organization constructs, is that they lacked comprehensive directions for measurement and improvement, which can make implementing and operationalizing the concept difficult due to a lack of clarity.

Different from both Senge (2006) and Garvin (1993), knowledge management scholar Nonaka (1991) characterized learning organizations as knowledge-building systems where developing new knowledge is perceived as a company-wide philosophy or way of behaving. He encouraged the use of metaphors and organizational redundancy to help the organization focus on collective thinking, cross-functional communication, and knowledge sharing (Garvin, 1993). Different from Garvin's (1993) interpretation of the learning organization, both Senge (2006) and Nonaka (1991) share similarities because both examine the organization as an interconnected system that relies heavily on team-based learning, organizational vision, and behavior. Other scholars would later develop learning organization constructs integrating both individual level and organizational level learning.

Marsick and Watkins (2003) would take such an integrated approach by developing a construct that addresses both the organization and individual in their definition of learning organizations. Their construct is comprised of seven dimensions, which include continuous learning, inquiry and dialogue, collaboration and team learning, people empowerment,

environmental connection, embedded systems, and strategic leadership (Marsick & Watkins, 2003). Much like Senge (2006), this model underscores factors such as team learning, and inquiry and dialogue, as part of the knowledge building process within organizations. But unlike Garvin (1993) it does not include measurement as a component and only infers that the elements of its construct can lead to organizational improvement. Additionally, Marsick and Watkins (2003) introduced the role of leadership and people empowerment as part of their learning organization construct. And although it could be inferred from Senge (2006), Garvin (1993), and Nonaka (1991) that strategic leadership is an important factor, Marsick and Watkins (2003) were the first to include it as part of their construct of learning organizations. Within the higher education setting, two dimensions of the Marsick and Watkins (2003) construct were studied to understand two specific dimensions of the construct, namely continuous learning and strategic leadership. Specifically, Dahleez et al. (2023) examined inclusive leadership styles among managerial roles and continuous learning and found that both were key elements toward promoting organizational learning. They found that inclusive leadership is positively associated with organizational learning in academic settings (Dahleez et al., 2023). Unfortunately, this study is only one of very few studies conducted in higher education settings that examined leadership in empirical research through the lens of the learning organization construct.

Additional research followed Marsick and Watkin's (2003) that looked at learning as a social process at the individual level of the organization. In 2005, management scholar Jensen examined the learning organization from the perspective of learning and the accumulation of new knowledge. Specifically, he developed a six-part model that is based on the premise that data that comes into the organization starts with an individual. This data becomes information, and that information then becomes new knowledge. The assertion being that only information

can be shared—not knowledge, and as such, without the transfer of information, new knowledge cannot be developed (Jensen, 2005). Jensen’s (2005) model of the learning organization outlines six social processes that occur within the learning organization. The sequential order includes data, information, knowledge, action, learning and new knowledge. In this construct, no reference is made about measuring the action taken after new knowledge is developed to identify a change in individual behavior or cognition. Marsick and Watkins (2003) argued that strategic leadership has a role in shaping the organizational environment toward advancing or fostering new knowledge, yet Jensen (2005) did not include this feature in his model.

Between both organizational learning and the learning organization is the view that learning within organizations is a process that results in the change of behavior or cognition based on knowledge at the individual level. From this shared perspective, researchers have built their understanding of organizational learning around the notions of knowledge acquisition, knowledge sharing and knowledge transferring (Fiol & Lyles, 1985; Garvin, 1993; Levitt & March, 1988). Each of these scholars argues that learning organizations place emphasis on the contribution of all members of the organizations without respect to their roles or positions (Fiol & Lyles, 1985; Kendrick, 2019). Additionally, the learning organization values everyone as being important toward advancing knowledge gained for the benefit of the entire organization (Kendrick, 2019). To summarize, not every organization is a learning organization although organizational learning can take place even if the organization is not, by definition or interpretation, a learning organization.

### **Organizational Learning**

While many attempts have been made to provide a comprehensive definition of organizational learning, it is most commonly understood as the process by which individuals



learn in organizational environments (Elkjaer & Wahlgren, 2005). From this foundational understanding, scholars and researchers have developed their own constructs and corresponding frameworks and models outlining its use (Elkjaer & Wahlgren, 2005). These conceptualizations have examined multiple aspects of organizational learning, such as the process by which individuals learn, the acquisition of skills and knowledge, information that becomes knowledge, and the mechanisms by which skills knowledge is transferred throughout the organization. Some scholars reject the focus of organizational learning at the individual level, and instead base their understanding on the assertion that individuals and the organizational environment are not mutually exclusive (Elkjaer & Wahlgren, 2005). Additionally, some scholars have described organizational learning as exclusively behavioral while others have incorporated frameworks that include both behavioral and cognitive processes toward a desired change or outcome, as mentioned earlier (Schwandt & Marquardt, 2000).

Similar to the concept of the learning organization, some researchers who focus on organizational learning, have done so, by examining contextual factors such as culture, social, strategy, organizational structure, and internal and external environments (Crossan, 2004; Fiol & Lyles, 1985) that impact and contribute to learning within the organization. Although this literature review only addresses the process of organizational learning and learning approaches individuals use, it is worth noting the multiple ways in which organizational learning is conceptualized and examined throughout the literature.

### ***Individual Knowledge Acquisition***

Literature on organizational learning has most often been examined from the perspective of the organizational behavior and management science discipline (Cyert & March, 1963; Easterby-Smith, 1997; Elkjaer & Wahlgren, 2005; March & Simon, 1958). Within this

disciplinary orientation, early interpretations of organizational learning focused on how managers could enhance information processing and decision making to help organizations, vis a vis their managers, adapt to environmental changes. The process involves taking information in, such as data that is related to one's management job function, converting it to knowledge, and transferring it to others within the organization. This interpretation of organizational learning relies on the results of knowledge acquisition that enhanced an individual's cognitive skills to advance the organization (Easterby-Smith, 1997; Elkjaer & Wahlgren, 2005). This process of abstracting information from individuals to help improve the organization is based on the assumption that the organization can store what it has learned. Further, it does so to build capacity for future practices, change behavior for organizational improvement, and also for modification of processes and new knowledge (Argote, 2011; Argyris & Schön, 1974; Bess & Dee, 2012; Elkjaer & Wahlgren, 2005; Nevis et al., 1995; Senge, 2006). From this understanding of organizational learning that occurs at the individual level, there remains additional debate as to what learning really is and the processes or steps one takes to achieve the desired learning result.

Organizational learning theorists such as Trujillo and colleagues (2005) approached organizational learning as a process in which group members acquire "new knowledge or technological skills that can improve strategic decision making, tactical planning or design and operational activities" (p. 181). Emphasis is placed on learning for both the individual and the organization to advance organizational growth and performance. Additionally, they underscore that organizational learning should not be identified as the sum of all individual knowledge within the organization, nor the collective knowledge acquired throughout the organization (Trujillo et al., 2005). Instead, organizational learning must be understood for the roles that both

individual and organizational structures play in advancing learning capabilities (Cyert & March, 1963; Trujillo et al., 2005). It is the interplay of individual learning within the organization versus a summation of what individuals have learned collectively that the scholars argue is the basis for organizational learning.

### ***Organizational Learning Orientations***

Despite the variation in scholarly definitions of organizational learning, there does appear to be agreement about the primary learning domains developed and used during the learning process. Many organizational learning models and theoretical frameworks approach organizational learning from two primary learning domains—cognitive and behavioral (Leavitt, 2011). On one hand, the cognitive domain focuses on the thinking and reasoning aspects of learning through one's mental models or schemas (Argyris & Schön, 1974; Leavitt, 2011; Senge, 2006). Many organizational learning constructs require a change in cognition and/or behavior and actions, or a change in both (Argote, 2011; Leavitt, 2011). On the other hand, the behavioral domain focuses on learning by doing and the insight one gains through experience, observation, and the critical analysis and examination of outcomes (Argyris & Schön, 1974; Crossan et al., 1999; Huber, 1991; Leavitt, 2011; Senge, 2006). Depending on the change or adaptation outcomes, both domains can be present in varying degrees throughout the learning process (Argote, 2011). For example, Shrivastava's (1983) organizational learning approach focuses on both cognition and behavior in organizational learning. He defines organizational learning as a process through which the organizational knowledge base is developed and refined (Bess & Dee, 2012). Shrivastava's (1983) learning model outlines four perspectives of organizational learning which include adaptation, developing knowledge of action-outcome relationships, assumption

sharing, and institutionalized experience. All four include cognitive and behavioral domains of learning.

### ***Organizational Learning Typologies***

In addition to the domains of cognition and behavior, organizational learning frameworks and models can also incorporate different learning typologies (Crossan et al., 2011). Two classical typologies of learning commonly referenced in the organizational learning literature are adaptive and generative learning (Argyris & Schön, 1974; Fiol & Lyles, 1985; Senge, 2006). Adaptive learning is described as learning that builds on existing knowledge and schemas. In this typology, knowledge is adjusted or modified with new thinking to accomplish an objective (Senge, 2006). By contrast, generative learning is described as learning that questions individual assumptions about existing knowledge through experimentation and continuous learning (Senge, 2006). Generative learning is often required for innovation and successful change initiatives (Senge, 2006). Other perspectives of generative learning were advanced by March (1991), who expanded generative learning to include two modes of organizational learning. The first is exploitation, or the use of existing knowledge to acquire value to what an individual already knows, and second, the exploration of thinking in previously unexplored ways. Other commonly referenced learning typologies include experiential learning, which describes learning that occurs by doing and the actions one takes to accomplish a task (Senge, 2006).

Early researchers viewed organizational learning in a narrow scope because they focused solely on individual learning that occurs as person-centric learning that then influences the organization (Simon, 1969). For example, structural elements that influence individual learning within their role and how that role shapes their learning and understanding about the organization (Simon, 1969). This narrow focus of the construct is limiting and fails to recognize the pre-

existing knowledge one brings to a role, and the generative learning that occurs through experimentation or challenging of assumptions about the role and the organization.

Argyris and Schön (1974, 1978) gravitated to the element of action that occurs within the adaptation typology and developed what they called the theory of action. This theory would go on to become a foundational element of organizational learning as a process of detecting and correcting errors. Argyris and Schön (1974, 1978) defined organizational learning as learning that comes from identifying and correcting errors that have been made within the organization. Their organizational learning model of single-loop and double-loop learning would be the first widely used and referenced model of organizational learning within the literature (Fiol & Lyles, 1985).

As previously stated, there are many different interpretations of what organizational learning is and how it is practiced. For instance, some theorists suggest that learning is equated with adaptations made by individuals and organizations, while others strongly disagree, citing that adaptation is relegated to a defensive adjustment of a process or response to the organizational environment versus proactive actions (Fiol & Lyles, 1985). Consequently, reactive behavior requires no real understanding from the individual of what was learned but rather, only an adaptation of what was learned (Fiol & Lyles, 1985). This type of adaptation may or may not constitute learning (Crossan, 2004; Fiol & Lyles, 1985). Strategy researcher Prange (1999) argued that within the study of organizational learning, it is not the organization that should be the target, but rather the individuals in the organization who are doing the learning, that should be the focus of organizational learning.

## **Organizational Learning as a Process**

Understanding the historical context of learning theory requires examining the work of educator and psychologist John Dewey. Dewey's (1938) theory of learning can be described as learning by doing (Sikandar, 2015). Dewey's philosophical orientation was that of a pragmatist and focused on the importance of students interacting with their environment and socially constructing their learning and knowledge rather than relying solely on learning theory (Rumens & Kelemen, 2016). Additionally, because Dewey emphasized the role of doing in the process of learning, he theorized that by doing, a student can directly connect the learning to their everyday environment (Hildebrand, 2016).

Due to his social constructivist approach to learning, knowledge, and inquiry, many early researchers of organizational learning were influenced by Dewey (1938) and used their understanding of it to further shape process-oriented concepts of organizational learning (Hickman, 1998; Sikandar, 2015). Specifically, it was Dewey's (1938) learning and inquiry theory, which posits that individual change in learning results from: (a) the action of doing; (b) learning to adapt to one's internal or external environment; and (c) the development of new knowledge to share (Sikandar, 2015). For example, Nevis et al. (1995) theorized that the organizational learning process occurs in three sequential stages: (a) knowledge acquisition, (b) knowledge sharing, and (c) knowledge utilization. Similarly, Trujillo et al. (2005) described the process of organizational learning in four parts: (a) knowledge or information acquisition, (b) knowledge interpretation, (c) knowledge storage, and (d) knowledge distribution. Other researchers describe the process as a combination of knowledge acquisition, knowledge distribution, knowledge interpretation, and organizational memory of knowledge (López et al., 2006; Tseng & McLean, 2008). These theorists describe the process of learning in sequential

fashion; however, Nevis et al. (1995) included the step of individuals sharing knowledge. Trujillo et al. (2005) make no mention of this knowledge transfer in their construct, but rather focused on interpretation and storage. The absence of knowledge transfer by Trujillo and colleagues leaves one to speculate how their concept of organizational memory can occur if what is learned is not transferred to other parts of the organization.

Other learning theories that describe the process of learning focus less on knowledge acquisition but rather on error detection to learning. As noted earlier, Argyris and Schön's (1978) single-loop and double-loop learning provides one of the most influential and popular frameworks of the learning process from both the individual and organizational levels. Single-loop learning focuses on the action one takes to detect errors and then correct the error (Argyris & Schön, 1978). By contrast, double-loop learning focuses on modifying an organization's operational assumptions, policies, and proposed plans at the organizational level (Argyris & Schön, 1978). Other approaches and theories to the process of learning within organizations includes adaptive, generative, experiential learning, and assimilation learning theories, which include both cognitive and behavioral elements (Senge, 2006; Leavitt, 2011). Each of these learning approaches are described in the following sections.

**Adaptive and Generative Learning Theory.** Adaptive learning is a type of cognitive learning that comes from the basis of knowledge that already exists. That knowledge is built upon with new thinking to achieve a particular goal to which the organization may need to adapt in some form or fashion (Leavitt, 2011; Senge, 1990). This type of learning is ongoing and is typically seen in organizations that have a strong culture for expanding existing knowledge and skills, often referred to as continuous learning (Leavitt, 2011). For example, the knowledge gaps between an organization's ability to address quality concerns or the competitive price point of

products they develop, allows the organization to learn how to close these gaps, thus building competitive advantage and agility for the organization (Leavitt, 2011). Generative learning, by contrast, is the type of learning that occurs when the organization is producing new ideas and information to immediately use or address a new situation or threat in the marketplace (Harrison & Sullivan, 2000; Leavitt, 2011; March, 1991; Senge, 1990). For example, during the genesis of the COVID-19 pandemic, Internet-based web conferencing tech companies, such as Zoom, WebEx, and Microsoft Teams, had to immediately respond to demands from customers for additional conferencing capabilities in response to customer needs (Ranhan, 2021). This showcases an example of generative learning.

**Experiential Learning Theory.** Kolb's (1984) experiential learning model has contributed significantly to our understanding of organizational learning and is widely used by organizational learning practitioners and theorists (Leavitt, 2011). Inspired by the work of educator and psychologist John Dewey and social psychologist Kurt Lewin, experiential learning theory is an action-based approach to learning that approaches organizational learning from both a cognitive and behavioral perspective. Experiential learning theory posits that individuals learn through experience and hands-on activities. Kolb's (1984) experiential learning theory proposes four stages in the learning process. It includes: (a) concrete experience, (b) reflective observation, (c) abstract conceptualization, and (d) active experimentation (Kolb, 1984; Leavitt, 2011; Yeganeh & Kolb, 2012). The sequence of the learning stages outlines how learning occurs in this order with each one leading to the next. First, concrete learning experiences occur, and that inspires observation and reflection about the experience, which is then internalized into abstract concepts that inspires a change in behavior (Kolb, 1984; Leavitt, 2011; Yeganeh & Kolb, 2012).



**Assimilation Learning Theory.** In addition to other cognitive learning processes at the individual learning level, assimilation theory is a cognitive approach to learning developed by educational psychologist Ausubel (1963). Inspired by the works of psychologist Piaget (1929) and his work in cognitive development, assimilation learning theory states that learning occurs when new information taken in by the learner is integrated into a pre-existing cognitive hierarchical structure (Ausubel et al., 1978; Seel, 2012). Assimilation of information occurs when the new information is anchored to already existing concepts. Well integrated knowledge occurs when the learner can find meaning in the information that is presented. Ausubel (1978) posits that meaningful knowledge that is anchored to the system is less likely to be forgotten. And further, that one's prior knowledge is an essential component of learning (Ausubel et al., 1978).

Nevis et al. (1995) define assimilation theory from the organizational level and not the individual level. They define it as a behavioral learning approach that results in the integration of learning to make it broadly available and generalizable to new situations at all levels of the organization (Leavitt, 2011). Consequently, this theoretical approach to organizational learning is frequently used in many organizations because of its ability to impact the organization more broadly. Nevis et al. (1995) equate the individual cognitive hierarchical structure of Ausubel's (1963) learning theory to what they call organizational memory. Nevis et al. (1995) posit that when knowledge is more valuable than learning it is most meaningful to the organization because it becomes institutionally available for the entire organization (Leavitt, 2011).

### **Comparing and Contrasting Organizational Learning Approaches**

The concept of organizational learning has been examined by many authors who have offered definitions and designed frameworks for its implementation. From Argyris and Schön's

(1978) single-loop and double-loop learning to Senge's (2006) five disciplines, nearly all the constructs require individuals to do, reflect, connect, and make decisions from a cognitive, behavioral, or both cognitive and behavioral learning styles. Senge's (2006) theoretical framework uses both the cognitive and behavioral styles of learning with the use of adaptive and generative processes for learning. Of his five disciplines for the learning organization, mental models and systems thinking are cognitive, while personal mastery, building a shared vision, and team learning are in the behavioral domain. Moreover, Senge and colleagues' (1994) four-part team learning framework, the "wheel of learning," includes doing, reflecting, connecting, and deciding, as factors for facilitating team learning (p. 59). This process is very similar to Kolb's (1984) experiential learning process of experiencing, reflecting, thinking, and acting.

Argyris and Schön's (1978) single-loop and double-loop learning are types of organizational learning processes that reflect cognitive styles of learning (Leavitt, 2011). Specifically, single-loop learning reflects the adaptive learning process where individuals, teams, or the organization modify their actions based on what is expected. Or the detection of errors that need correction that allows the organization to continue in its present policies and achieve its current objective. Double-loop learning integrates elements of reflection and thinking reflecting the generative learning process. In this process, individuals, teams, or the organization correct errors by addressing the underlying norms, policies, and objectives of the organization with a goal of organizational improvement.

The three-stage organizational learning construct by Nevis et al.'s (1995) also integrates both cognitive and behavioral styles. The first stage, knowledge acquisition, draws from the cognitive style, which asserts that cognition is necessary for the intake and processing of new

data and information, while the stages of knowledge sharing, and knowledge utilization are behavioral.

Alternatively, Levitt and March (1988) interpret organizational learning based on organizational characteristics that draw from the behavioral approach to learning and less on the cognitive approach often used in individual learning. Specifically, Levitt and March (1988) suggest three characteristics of organizational learning. First, that learning can occur based on routines or processes that are then duplicated by individuals. This type of action is taken based on logic that stems from learned routines rather than the logic associated with intention or consequences (Levitt & March, 1988). The second characteristic of organizational learning is that organizations are history dependent. In this case, routines are based more on what has happened in the past rather than anticipating or adapting to what might happen in the future. Similarly, at the individual level, one adapts to experiences based on feedback from prior outcomes. And the third characteristic is that organizations are oriented toward targets and goals because their behavior is determined by the outcomes they observe and the aspirations they have for those outcomes (Levitt & March, 1988) thereby allowing and drawing a sharper focus on what defines success and failure. From these characteristics, one can summarize that organizational learning happens by decoding inferences from history into routines that guide future behavior.

How organizational learning occurs and is practiced within organizations assumes that learning is occurring and has the organizational characteristics, or context, necessary to facilitate learning. Organizational learning scholars Fiol and Lyles (1985), identify four factors that suggest that an organization has the context for learning to occur. One, an organizational culture that is conducive to learning; two, that an organization has a strategy that allows agility; three, an

organizational structure that allows both innovation and new insights; and four, the organizational environment itself. Argyris and Schön (1978) took this even further and suggested that organizational effectiveness must be improved to claim that organizational learning has occurred. Additionally, Huber (1991) states that organizational learning does not necessarily have to be a conscious activity, nor does it have to be intentional whereas Argyris and Schön (1978) argued that double-loop learning requires questioning assumptions, which requires intentionality. Huber (1991) claimed that organizational learning may not always lead to increased effectiveness nor positive learning, in which case individuals can learn incorrectly and performance is not necessarily improved. These scholars approach organizational learning from the perspective of cultural characteristics of the organization and the relationship between organizational effectiveness and organizational learning, rather than the previously discussed theories that are based on organizational styles of learning in behavioral and cognitive or a combination of both.

Most importantly, organizational learning is critical for organizational effectiveness and cultivating an environment that facilitates innovation and competitive advantage in the marketplace (Leavitt, 2011). Hurley and Hult (1998) emphasize this link between organizational learning as a construct that is necessary for competitive advantage especially as it pertains to global marketing and strategic business planning. Moreover, Hurley and Hult (1998) also draw a connection between organizational learning and its positive effect on individual and organizational performance.

### **Limitations and Strengths of Organizational Learning**

There is no shortage of criticisms of organizational learning as a construct, its practices, or its impact on organizational effectiveness. One of its strongest criticisms is the perception that

organizational learning falls short of being able to measure whether learning is happening in the organization due to uncontrollable factors such as changes in the workforce or individual experiences that contribute to learning (Leavitt, 2011). For example, Kolb's (1984) experiential learning theory has proven to be quite useful in many organizations. However, some say that it neglects the role of social, historical, and cultural aspects of human action (Leavitt, 2011) as alluded to by Fiol and Lyles (1985). One of the challenges of learning from experiences or changes in the workforce is that experiences that happen in the workplace can be complex. There are many variables that contribute to organizational learning that happen outside the organizational setting that the organization cannot control.

Experiential learning theory naturally incorporates individual and personal inferences from information obtained, while also engaging in memory, past experiences, beliefs and assumptions about certain situations from which an individual might draw information or knowledge (Levitt & March, 1988). At the organizational level or systems level, there are limitations to how organizational learning is practiced with respect to organizational memory and institutional knowledge due various factors such as employee turnover, conflict, changing demographics, and organizational strategies that can impact learning at the systems level (Leavitt, 2011). On one hand, these variables make it difficult to collectively glean learnings from individuals' experiences and retain them across the enterprise. On the other hand, there are many reasons why organizational learning should be examined and incorporated into organizational culture, strategy and performance. The concept of organizational learning has shed tremendous light on the importance of knowledge development and learning. All four of these learning theories; adaptive, generative, experiential, and assimilation, bring understanding to the learning processes and the role it plays in organizational learning. Specifically, Senge

(2006) and Nevis et al. (1995) support the need for more bold and aggressive learning processes, such as generative learning, especially when transformational change is required. This type of learning is necessary in today's fast-paced and complex market-driven environments.

Even though there is certainly value in the ability to measure learning and its impact on organizational performance and effectiveness, there is equally as much value regarding the process of learning and the methods used to distribute learning and learning practices across the enterprise (Leavitt, 2011). It is also important for learning practices and knowledge to become available to both individuals and groups where learning is experienced. However, some theorists challenge the organizational learning concept altogether citing that knowledge that comes from learning, is more than mere knowledge or information (Weick, 1991). One can be exposed to information, and understanding the extent to which that knowledge becomes a part of the institution, also known as institutional memory, requires more research (Weick, 1991). Yet almost all theories on organizational learning are concerned with knowledge acquisition and transfer, which occurs exclusively at the individual level except Senge (2006) who expands organizational learning to both the individual and team levels.

Argyris (1991) emphasized the importance of managers and employees looking inward to learn and reason about their own behavior in new and more effective ways. Hodgkinson and Stewart (1998) underscored the need for individuals to reflect on their actions and be lifelong learners which is also supported by Nevis et al.'s (2011) stages of learning, particularly the reflective nature of learning. Additionally, thinking back to Kolb (1984) and his work, organizational learning reflects a learning process that begins at the individual level. And Senge's (2006) emphasis on individual mental models illustrates a process created and perpetuated in the mind of individuals and is based exclusively on mental models' individuals

have developed over time. The work of early theorists such as John Dewey and Herbert Simon take the systems approach to organizational learning (Brandi & Elkjaer, 2013) and focus less on the individual and more on the organizational systems approach to organizational learning and the way the organization grows and develops across multiple systems. This approach allows for learning continuity and organizational memory across the organization.

Organizational learning theories and approaches address organizational learning from multiple aspects including organizational learning practices at the individual, group, and systems levels. Additionally, organizational learning as a social and cultural characteristic that facilitates learning and the connection between organizational learning and institutional effectiveness and performance is also an important aspect in understanding pathways to organizational learning for individuals and the multiple ways it can be achieved.

### **Organizational Learning in Higher Education**

The concept of organizational learning is particularly appropriate for higher education given its ever-changing need to adapt to a changing industry (Blackwell & Blackmore, 2003). One of the biggest barriers to organizational learning in colleges and universities relates to the flow of organizational knowledge. As a result, knowledge developed by individuals or groups may not necessarily translate into organizational knowledge or institutional memory (Dee & Leisyte, 2017). When this flow of knowledge is constrained or blocked, knowledge gained in one area cannot be shared or used to improve practices in other parts of the organization (Dee & Leisyte, 2017). Kezar (2005) suggested that one reason this lack of sharing happens is that colleges and universities have fewer mechanisms to advance knowledge across departments and academic units. The absence of ways to share information across the institution prevents knowledge from coming together and being shared. The decentralized nature of colleges and

universities can compound this challenge even further. Within higher education, professional development is often seen as a pathway to organizational learning, but connections between these learning opportunities and organizational change are scant (Sorcinelli et al., 2006).

Few examples of research studies exist about the contributions of classified and operational staff in higher education toward achieving increased organizational performance or institutional effectiveness (Blackwell & Blackmore, 2003). Yet, staff play a critical role in the operational success of higher education operational goals and organizational objectives (Chitorelidze, 2017).

The term *staff* in higher education in the United States (U.S.) generally refers to those assigned to operational support positions. Titles such as program manager, project coordinator, registrar, administrative assistant, director, and other administrators are a few examples of such roles. These roles are different from higher-level senior staff roles such as vice-chancellor, presidents, rectors, and other higher-level administrative roles (Bess & Dee, 2012). Webb (1996) defined *staff development* as the “institutional policies, programs and procedures that facilitate and support staff” (p. 1) so they can serve to the fullest capacity of their role. Webb (1996) also points to an ongoing tension between individual and institutional needs but emphasizes the need to distinguish the importance of the staff development relative to other development opportunities such as faculty staff, which generally focus on teaching and learning due to their close proximity to the day-to-day functions of the organization (Blackwell & Blackmore, 2003).

Support staff can be found throughout almost every aspect of the working environment within higher education and play a role not just at the operational level, but also strategic and mission levels of the organization (Say, 2019). Professional development for staff has only



received marginal considerations when considering the institution's strategic planning goals and objectives (Blackwell & Blackmore, 2003).

Higher education institutions can gain several benefits from the use of organizational learning concepts, including strengthening knowledge sharing, problem-solving capabilities, as well as implement strategies to enhance institutional effectiveness and innovation (Kezar, 2005). Learning concepts can also help improve mechanisms used for responses accreditation agencies and organizational performance assessments (Dee & Leisyte, 2017). Universities have long been characterized as places of learning and knowledge acquisition with high levels of specializations among its faculty (Mintzberg, 1973). It stands to reason that higher education is well-poised to use the principles of organizational learning models to tackle issues of competitive advantage, innovation institutional effectiveness to name a few. The Nevis et al. (1995) organizational learning model of knowledge acquisition, knowledge sharing, and knowledge utilization provides a practical framework for universities and colleges that want to strengthen capabilities in this area and learn more precisely how they can leverage this framework within the staff ranks.

### **Workplace Learning**

In addition to the concepts of organizational learning and the learning organization, workplace learning has also been researched by scholars to further explore the phenomenon of learning at work and learning through workplace activities (Le Clus, 2011). Similar to organizational learning and the learning organization, there are many approaches and definitions of workplace learning (Elkjaer & Wahlgren, 2005; Le Clus, 2011; Marsick & Watkins, 1990; Tynjälä, 2008, 2022). With disciplinary roots in adult learning, education, and sociology, workplace learning is most often characterized as the way individuals learn in the work

environment (Elkjaer & Wahlgren, 2005; Ünlühisarcıklı, 2018). Further, it often focuses on individuals learning a specific and conscious work activity or task for work in the workplace setting (Marsick, 1987).

Most scholars agree that the work environment can provide a rich opportunity in which to learn (Billet, 1996; Le Clus, 2011). As such, learning at work and for work has become an important organizational agenda item and strategic priority (Billet, 1996). The way employees perceive learning has widespread interpretations because the term ‘learning’ is used in different ways (Le Clus, 2011). Learning in the workplace is often situated in the context of social practice where the work environment becomes the opportunity for individuals to acquire and share knowledge (Billet, 1996; Lave & Wenger, 1999). Workplace learning types such as experience-based learning and self-directed learning are also examined as methods of learning in workplace learning literature (Le Clus, 2011).

Learning new skills and building knowledge at work helps employees manage change, perform well, and have satisfaction with the work they accomplish (Le Clus, 2011). Education scholar Le Clus (2011) believes that for these reasons, work and learning are quite similar experiences that together represent the majority of an employee’s everyday work activities. Both work and learning experiences in the workplace setting illustrate how individuals make sense of the situations they face (Le Clus, 2011).

### ***Adult Learning Theory***

To further the understanding of learning at work, scholars point to foundational principles underscored in the disciplinary focus of adult learning theory. Adult learning theory, also called andragogy (Knowles, 1984), has many applications to workplace learning. It is defined as the method and practice of helping adults learn (Knowles, 1984; Merriam & Bierema, 2014).

Research on adult learning has examined various aspects of adult learning from the perspective of the learner to understand what motivates adults to learn and under what circumstances it is generated. Education scholar Lindeman (1926) challenged conventional approaches to adult education and emphasized the need to be creative and innovative to effectively meet the needs of adult learners. A trailblazer in the field of adult education, Lindeman's book, titled *The Meaning of Adult Education*, focused his analysis of adult learning on the situational needs and interests of the learner with four primary principles of adult education: (a) education is a life-long process; (b) it is not associated with any particular vocation; (c) it must emphasize situations and not the individual; (d) should place primary focus on the individual learner's experience (Le Clus, 2011; Lindeman, 1926). Further, Lindeman's (1926) examination on the characteristics of situation-motivated learning and learner experiences, established a baseline for subsequent research in the field (Lindeman, 1926, 1961; Merriam & Bierema, 2014).

Similar to Lindeman (1926), Dewey's (1938) focus on the concept of experience, underscored Lindeman's examination of the learner's experience within a social environment (Hohr, 2013). Dewey's (1938, 1986) theory on the concept of experience examined knowledge as socially constructed from individual experiences (Dewey, 1986; Hohr, 2013). More modern approaches and frameworks would emerge in the field of adult learning. Most notably, Malcom Knowles (1984), who drew from Lindeman's (1926) research on adult learning, developed a theoretical framework of adult learning based on the following assumptions of adult learners, which argues they: (a) are self-directed in their learning; (b) draw from their experiences as a resource for learning; (c) have a readiness to learn due to social roles within their environment and they are teachable; (d) learn from a problem-centered perspective, due to an immediate problems they face; (e) have internal motivation, which provides personal fulfillment and

motivates one to learn further; (f) need to know why they are learning what they are learning, provides context for how and why it applies to their immediate situation (Knowles, 1984; Merriam & Bierema, 2014). From Knowles' (1984) popular framework of adult learning theory, and other scholars before him, a connection between adult learning theory and its application to learning at work emerges.

### ***Formal and Informal Learning***

Literature on workplace learning is generally characterized as occurring through formal or informal methods (Le Clus, 2011; Marsick & Watkins, 1990; Ünlühisarcıklı, 2018). As such, workplace learning offers various strategies and perspectives that enable individuals to learn as part of their work experience (Le Clus, 2011). Of the learning that occurs in the workplace, there is increased awareness that valuable learning happens informally. This type of learning can occur through daily conversations in everyday work activities (Le Clus, 2011; Tseng & McLean, 2008).

Marsick and Watkins (1990, 2001) focused a great deal of their organizational learning research and analysis on formal, informal, and incidental learning. Formal learning is learning that occurs through an education or training institution held in a classroom with a structured curriculum and organized learning objectives (Marsick & Watkins, 2001; Rogers, 2014; Ünlühisarcıklı, 2018). By contrast, informal learning focuses on the experiential forms of learning that take place within a social environment but not inside a classroom or structured lectures (Elkjaer & Wahlgren, 2005). This type of learning on the job includes activities that are meaningful to everyday work requirements and is characterized by a range of strategies such as social interaction, daily conversation, and teamwork (Le Clus, 2011). More specifically, informal learning involves making sense of the daily learning that takes place and interacting with the

embedded knowledge of the organization (Marsick & Watkins, 2001; Ünlühisarcıklı, 2018).

Incidental learning is a by-product of informal learning and occurs as an individual is intentionally learning something else (Marsick & Watkins, 1990, 2001). Here, learning occurs while engaged in another activity. Marsick and Watkins (2003) expanded their research on informal learning to include related ideas such as, learning by doing, continuous learning for continuous improvement, learning from experience or experienced-based learning, accidental learning, self-managed learning as well as significant contributions to the learning organization construct (Watkins & Marsick, 2003).

Other major contributors to workplace learning include the work of H. Hodkinson and P. Hodkinson (2004) whose research identified workplace learning as learning that occurs for the following reasons: (a) learning that is already known to others, (b) for the development of existing knowledge and capabilities, and (c) learning that is new to the organization. They further compared this learning in the workplace as either intentional planned learning or unintentional planned learning (Hodkinson & Hodkinson, 2004; Ünlühisarcıklı, 2018). Beckett and Hager (2002) offer a comprehensive and concise understanding of the unique differences between informal and formal learning. They identify six characteristics of practice-based informal workplace learning as: (a) organic or holistic, (b) contextual, (c) activity- and experience-based, (d) not an end in itself, (e) learner initiated, (f) collaborative and collegial. They posit that informal learning in the workplace can and often is an essential element of proficiency in practice in most occupations (Beckett & Hager, 2002). Hager and Halliday (2009) later added to this earlier research and focused on other aspects of workplace learning by examining context of the workplace and the surroundings in which learning occurs. They define informal workplace learning that occurs through the practice of work as an evolving capacity to make “context-

sensitive” decisions within different contextual environments (Hager & Halliday, 2009, p. 30).

Figure 1 provides a summary of the differences between formal learning and informal learning.

**Figure 1**

*Differences Between Formal and Informal Learning in the Workplace Setting*

<b>Formal learning</b>	<b>Informal workplace learning</b>
Single capacity focus (e.g., cognition)	Organic, holistic
Decontextualized	Contextualized
Passive spectator	Activity- and experience-based
An end in itself	Dependent on other activities
Stimulated by teachers/trainers	Activated by other learners
Individualistic	Collaborative and collegial

*Note.* This figure illustrates the elements of formal and informal learning among individuals in the workplace from the perspective of the individual experiencing the learning. Adapted from *Life, Work and Learning: Practice in Postmodernity*, by D. Beckett and P. Hager, Routledge

While most workplace learning scholars agree on the fundamental distinctions between formal and informal workplace learning, adult education researcher Billet (2002) rejects the characterization of workplace learning as informal. According to Billet (2002), the characterization of workplace learning as informal is inaccurate because it “suggests a situational determinism” (2002, p. 56). He argues instead that learning is interdependent and fluid between the learner and the social practice of learning at work (Billet, 2001).

Informal learning in the workplace is a primary strategy for learning, participating in workplace activities and performing tasks (Ünlühisarcıklı, 2018). Specifically, the way informal learning is facilitated in the workplace through collaboration is a key identifier (Le Clus, 2011; Marsick & Watkins, 1990, 2001). Characteristics across the literature of informal learning have included closely related factors such as unplanned, unstructured, incidental, and context-centered

learning that is linked to learning by and of others—all of which underscore the multiple ways in which researchers have approached its fundamental position within the workplace learning research (Ünlühisarcıklı, 2018).

## **Summary**

The literature on organizational learning at the individual level and organizational learning as a whole often intersect and overlap. From the early works of Argyris and Schön (1978) and their contributions of single-loop and double-loop learning, Senge's (1990, 2006) five disciplines, and Marsick and Watkins (2001) formal and informal learning, the interpretations and applications of organizational learning are continuously evolving. Scholars in the fields of education, management science, and sociopsychology have approached organizational learning from their own disciplinary perspective and paradigmatic frame. As such, literature about organizational learning often reflects the orientations of the researcher.

In her seminal work on workplace learning and its relationship to organizational learning, Tynjälä (2022) highlights task learning and knowledge sharing activities that are used to support and advance organizational learning outcomes such as task performance, personal development, teamwork, and decision making and problem solving. Moreover, Billet (2001) viewed the relationship between an individual and the work environment as interdependent in that the workplace provides the environment by which learning practices can occur and how individuals respond to learning opportunities. This interdependency between the organization and individual learning remains at the heart of theoretical approaches to organizational learning and its counterpart, the learning organization. Organizational learning that is cultivated and integrated into the organization has the potential to spark creativity among employees in ways that can transform an organization (Senge, 1999). Facilitators of learning, both formal and informal, from

the workplace learning literature focus on cognitive and behavioral domains of learning as a key layer of the learning process for individuals.

How administrative staff learn at work and build knowledge for sharing in a higher education setting is the basis for this research study. There are wide and varied opportunities for this concept in use to enhance institutional capabilities when examining universities and colleges from the organizational learning point of view. For this reason, considering both the process of learning and facilitators of learning holds great promise toward improving individual performance and institutional effectiveness. Higher education is not impervious to market forces and economic fluctuations and must be continuously looking for and learning about ways to move creatively into the future.



## **CHAPTER 3**

### **METHODS**

Research on individual learning processes and how knowledge is acquired, shared, and used among administrative staff in higher education is scant (Blackwell & Blackmore, 2003). The knowledge one has prior to joining an organization and the knowledge they gain once they begin a new job, may or may not, be a shared and common experience across certain administrative staff roles. This study explored, in depth, the specific learning processes of administrative staff participants and how they, based on their perceptions, learn(ed) how to do the jobs they are currently employed to do.

Using a phenomenological lens, this qualitative research study sought to examine university administrative staff perceptions of how they learned to do their jobs. The theoretical framework for the study used both Nevis et al.'s (1995) organizational learning theory and Tynjälä's (2008) workplace learning framework. I sought to understand the specific learning processes, activities, methods, and/or behaviors staff use as they describe how they learned to do the work/tasks required for their positions.

I further sought to understand what, if any, specific sources, or mechanisms (be they formal or informal) staff use in their development or advancement of learning how to do their jobs based on the Nevis et al. (1995) three-stage organizational learning construct of knowledge acquisition, knowledge sharing, and knowledge utilization. Data collected for the study took place through semi-structured interviews, and included extant data made available to me such as

job descriptions and/or department policies when available. The study began once permission was granted from the governing university IRB to conduct the study.

Ultimately, the study included 10 participants who volunteered from a purposive convenient sample of administrative staff at a mid-Atlantic regional public research university. Data were collected during two separate semi-structured interviews and then transcribed using translation software and coded using thematic analysis based on a priori codes. Results of the data are provided in narrative form and include data patterns and relationships to the themes connecting it to the theoretical framework. Additionally, a thorough discussion is provided to include limitations, delimitations, trustworthiness and validity criteria, and reflexivity measures.

The research questions at the center of this study include:

1. What aspects of the job did staff members feel prepared to do when starting their job?
  - a. To what degree did they feel they had the requisite knowledge needed to complete the day-to-day duties of their position?
  - b. If they did not feel prepared, where did they go or what did they do to learn the knowledge needed for their position or task?
2. What type of knowledge sharing (formal or informal) mechanism(s) are in place to facilitate knowledge sharing for staff, if any?
  - a. How is new knowledge integrated and/or shared by the individual with others?
  - b. How is this new knowledge that is developed at the group level shared throughout the academic unit, department, or program?
3. What informs the development of staff learning?
  - a. How do internal interactions and training help support individual learning?

- b. How do external interactions and training help support individual learning?

### **Theoretical Framework**

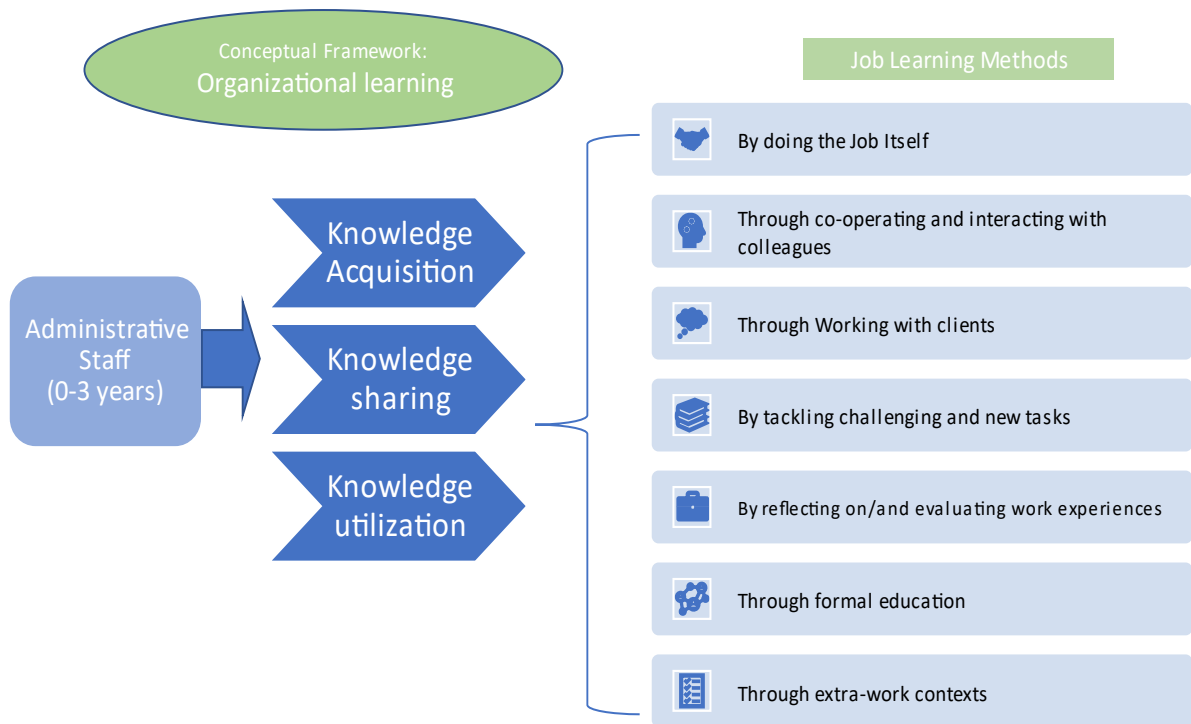
Theoretical frameworks are the hallmark of qualitative research methods and serve as a road map to structure all aspects of the research study (Antonenko, 2015). Moreover, using a theoretical framework as the basis for a research study provides a foundation for the research as it ties all aspects of the study together by situating and structuring the argument throughout, including the discussion and results of the study (Anfara & Mertz, 2006; Antonenko, 2015; Creswell, 2014; Creswell & Creswell, 2018). Anfara and Mertz (2006) further emphasize that the use of theory in qualitative research is connected to the methodology and its underlying epistemologies. The theoretical framework for this research study is based first on the foundational concept of organizational learning by Nevis et al. (1995) and second on the workplace learning model by Tynjälä (2008). The Nevis et al. (1995) organizational learning theory outlines three stages in which the learning process occurs. It includes: (a) knowledge acquisition, which consists of the development or creation of skills, insights, and relationships; (b) knowledge sharing, which includes the ways in which knowledge that was learned is disseminated throughout; and (c) knowledge utilization, which includes how individuals distribute knowledge they have developed and make it available throughout the organization and the ways in which they apply it to new situations (Nevis et al., 1995). Each stage focuses on practical application through cognitive and behavioral domains of learning.

The Tynjälä (2008) workplace learning model that facilitates these stages of learning outlines seven task-specific processes or methods of how people learn at work. It includes: (a) learning by doing the job itself; (b) learning through co-operating and interacting with colleagues; (c) learning through working with clients; (d) learning by tackling challenging and

new tasks; (e) learning by reflecting on and evaluating one’s work experiences; (f) learning through formal education; and (g) through extra-work contexts. For instance, an employee learning how to do their job must first acquire the necessary knowledge to do the job. They may use various methods to achieve this knowledge acquisition to include interacting with colleagues, pursuing formal methods (such as structured training), or by simply doing the job itself. This conceptual framework was used to guide the development of the interview questions and a priori codes, which can be found in Appendix A. Figure 1 presents how the two theoretical frameworks interact and provide the organizational learning conceptual framework used in this research study.

**Figure 2**

*Organizational Learning Conceptual Framework*



In Figure 2, the Nevis et al. (1995) theoretical framework establishes three broad independent stages of the “what” of organizational learning, while the Tynjälä (2008) workplace learning model offers the “how” within these organizational learning stages.

There is much interest in organizational learning and its ability to build organizational capacity and improve workplace performance. The Nevis et al. (1995) framework is a very comprehensive approach when considering the process of organizational learning and knowledge building. Nevis et al. (1995) were influenced by the work of Huber (1991) who conceptualized learning as occurring through the processing of information. Huber’s (1991) approach similarly offers a four-part framework which includes: (a) knowledge acquisition, (b) information distribution, (c) information interpretation, and (d) organizational memory. Prior research performed by Huber (1991) informed the empirical research of Nevis and their colleagues (1995) as their construct incorporates the aspects of institutional memory and information distribution into their theoretical framework.

The Nevis et al. (1995) framework and the Tynjälä (2008) workplace learning model guided the writing of the interview questions, influenced the deductive and inductive coding, and supported the thematic analysis to better understand the phenomena of how staff learn to do their jobs in richer detail to identify the following. Specifically, the frameworks sought to inform the study in order to understand the following:

1. To what extent do participant responses in this study connect to the Nevis et al. (1995) conceptual framework and the Tynjälä (2008) workplace learning model?
2. Have the participants had more formal or informal learning experiences?

Using the theories of Nevis et al. (1995) and Tynjälä (2008) as the framework for this study helped form a deeper understanding of the phenomena. Additionally, the frameworks

helped highlight the contributions to understanding how staff learn, be it formal or informal, and the value of organizational learning to advance staff performance and university effectiveness. Even though previous researchers such as Senge (1990, 2006) and Argyris and Schön (1978) focused on the “type” of learning, such as single-loop or double-loop, and the interconnectedness of organizational systems, Nevis et al. (1995) focused on the “stages” of learning and the Tynjälä (2008) workplace learning model focuses on specific learning processes and activities of how the individual learns. Specifically for this study, the focus was on how organizational learning is experienced by individual participants working in a university setting and what processes of learning best facilitates learning at the individual level. The perceptions of how specific learning processes and knowledge building takes place helped provide a deeper and richer understanding of what methods or actions the individual is performing to achieve tasks while in the workplace.

### **Research Paradigm**

Employee performance and building capacity to achieve organizational goals and objectives for competitive advantage and institutional effectiveness are critical for organizational success (Drucker, 2004; Schwandt & Marquardt, 2000; Senge, 2006). Inherent in this process is understanding how organizational learning happens at the individual level. I was guided by the epistemological foundation of research, which is that what we believe about reality and our beliefs about knowledge within one’s reality are what guides and shapes our behaviors and actions in the world (Allison & Pomeroy, 2000; Guba & Lincoln, 1994). Thus, I selected social constructivism as a research paradigm because of its ability to illuminate the lived experiences of employees while learning to do their job(s). How participants make meaning of their new position draws from a social constructivist philosophy (Creswell, 2014; Creswell & Creswell, 2018; Hammersley, 2013). The ability to connect and make meaning of their experiences and

their reality underscores the importance of participants whose experiences as staff level employees are uniquely different from those who hold higher roles at the university. Based on these experiences and perspectives, I further sought to understand the specific processes, mechanisms, and activities employees are using, and to what degree, while learning to complete tasks as part of their job requirements. By using the social constructivist paradigm, I wanted to understand and capture the world in which individuals live (Creswell, 2014) and the unique views they have about their experiences in their work environments.

This study identified and expanded understanding of knowledge sources that participants used and determined whether these learning opportunities were informal or formal in nature. Additionally, the findings explicate any existing organization-wide learning practices that exist at the institution where the participants currently work. Delving even further into how individuals construct their learning, the second research question explored the specific organizational learning processes used. Interview prompts sought to have the participants answer: “How do you achieve the learning you need in order to complete your work?” And then, “What mechanisms are in place to support or advance knowledge building and sharing at your job and in your department?” For instance, do staff members attend conferences, take classes, or meet in communities of practice (Lave & Wenger, 1999) to learn how to do their job? Understanding more about what sources, mechanisms, or constructs the participants used, or are using, to acquire, share, and utilize knowledge within their respective departments helps inform practice to improve employee learning.

### **Research Design**

A qualitative methodology was selected for the research design to provide a richer understanding of how individuals construct meaning in how they learn to complete tasks and

acquire knowledge within their administrative roles. Further, this non-positivistic method allowed participants an opportunity to provide narrative illustrations that quantitative research methods often cannot provide. And last, this methodological approach provided a means to understand from the participant's perspective, more deeply, the various aspects of the phenomenon (Creswell, 2014; Hammersley, 2013).

Phenomenology was selected as the research method due to the interpretive nature of the study and the required synthesis of the collected results grounded in the individual's experiences (Creswell, 2014). How participants make meaning of their new position draws from a social constructivist philosophy (Creswell, 2014; Hammersley, 2013). The ability to connect and make meaning of their experiences underscores the importance of participants whose experiences as a staff level employee are uniquely different from those who hold higher leadership roles at the university.

In this research study, I used semi-structured interviews, statements from the participants, and themes that emerge from these data to understand the phenomena and how the participants make meaning of their lived experiences within the context of their work environment. Specifically, the phenomenon explored was how administrative staff learn to do their jobs.

Further, I explored the perceptions of how organizational learning happens at the individual level for administrative staff members, keeping in mind that learning at other levels, such as, between groups of employees, may have also played a role in how the individual learned. Therefore, the research question addresses two broad areas of concern. One, "Did you have the requisite knowledge necessary to do the job you are currently doing prior to beginning in this role?" and part two of that same question, "What skills and knowledge were required for you to learn once you got in the role?" These questions established a baseline for what



knowledge if any, the individual knew before beginning in their role and what new knowledge they needed to learn after their arrival.

### *Participants*

This study used a purposive convenient sample (Creswell, 2014) and focused specifically on perceptions of organizational learning among operational staff at a small research university in the mid-Atlantic region. A purposive sample is a sample selected from a population based on the participant's unique characteristics, convenience, and availability (Creswell, 2014). I selected this university because of the size of the staff and my access to a gatekeeper on the human resources (HR) administrative team. This team has access to selection criteria such as staff ranks, and time in service.

I selected participants by contacting the gatekeeper in the office of HR at the site institution who has the authority to provide and/or solicit requests for potential participation in this study. I worked with the gatekeeper to identify participants who have similar responsibilities in the administrative staff ranks. Specifically, I used the HR classification guide used by the HR department to classify jobs and determine salary. This guide matches similar job duties and tasks and assigns them to certain pay grades and is used to provide consistency and equity among the administrative staff. The same school-wide employee database was accessed to provide names of participants who match the qualifications for participating in this study listed below. A pool of 242 administrative staff met the requirements for this study. Working with my gatekeeper, I next sent requests to participate in the study to the administrative staff members who met the requirement of being new on the job for no more than three years. I used matched-comparison purposive sampling to examine if or how experiences might differ among staff in different academic units and departments. Such comparisons included the following variables: recorded

job title, number of years at the institution, and identity characteristics such as race and gender. This selection process provided a variety of work experiences among the participants and time on campus. Those most recently hired had fresh memories of their first days on campus, whereas those broaching three years of employment had longer perspective of the arc of work responsibilities over the academic year.

Operational staff were selected from staff who meet the following criteria:

- Hired between 2020–2022 (i.e., during the height of the COVID pandemic).
- Full-time employee serving in a support capacity in functional areas within the institution to include, academic programs, university advancement, career center, academic advising, athletics, and auxiliary services.
- Participants who hold the job title of assistant, administrative, or coordinator are eligible to participate. Recognizing that not all roles and titles translate the same way in terms of responsibilities.
- Must not be an independent/individual contributor in the organization
- Must not be an employee who is a graduate assistant, part-time employee, or summer intern.

Additionally, the participants did not need to have prior experience working in a higher education setting at another institution nor a college degree. Additionally, employees selected could not hold the position of instructional faculty, administrator, or a combination of both.

At the site institution, there are approximately 3,414 staff members. Approximately 15% ( $n = 512$ ) were hired between 2020 and 2022. Of that 15%, I worked with my gatekeeper to identify employees who met the administrative staff criteria. The number who met this requirement was 242 employees (i.e., classified or operational staff). An email was sent to

prospective participants by the gatekeeper inviting them to participate in the study (see Appendix B). Once the staff contacted me regarding their willingness to participate in this study, I sent them a demographics Microsoft forms survey with additional questions to further narrow down the sample.

I initially sought to interview 10-12 staff thinking that I may lose some participants. Ultimately, a total of 10 participants took part in this study. Prior to conducting the official interviews, I conducted two pilot interviews to identify and/or tweak interview questions that may be unclear to participants. As a result of these pilot interviews, I changed the order of the questions in the first interview to flow more naturally with responses provided in the pilot interview. However, no questions were deleted or modified from the interview guide.

The selection criteria of securing participants from different academic units and support services provided an opportunity to compare the experiences between departments and academic units within the context of the Nevis et al. (1995) and the Tynjälä (2008) organizational learning models to identify possible impediments or advancements in knowledge development that advance organizational learning within the institution.

### ***Data Sources***

A key aspect of phenomenology involves the individual construction of one's reality and perspective regarding the phenomenon in question (Creswell, 2014). Data were collected from individuals through semi-structured interviews and extant data. All interviews were recorded using recording software. Semi-structured interviews provided flexibility that quantitative surveys did not offer due to the ability to ask follow-up and probing questions. By using semi-structured interviews to capture participants' ideas, perspectives, and experiences, I was able to examine more deeply the potential themes and patterns that emerged from the phenomenon

under study (Bogdan & Biklen, 1998; Lincoln & Guba, 1985). In addition to semi-structured interviews, I collected extant data provided by the participants to provide an additional data source. This extant data included the participants' job descriptions as well as memos collected during the coding process. The semi-structured interviews and extant data helped to meet the triangulation and trustworthiness measures of quality (Tracy, 2010).

Two semi-structured interviews were conducted using protocols informed by the Nevis et al. (1995) framework and the Tynjälä (2008) workplace learning model. Additionally, the questions were structured using an Appreciative Inquiry approach (Cooperrider & Whitney, 2005). This approach posits that questions should not just be problem-focused but positively framed in a way that also allows the research to focus on the strengths the participants note in how they learned to do their jobs (Cooperrider & Whitney, 2005). Of course, negative responses may emerge as well using this approach, however, the challenges are not the primary focus of the interview.

The semi-structured nature of the interview method gives an opportunity to ask open-ended questions that allow for rich follow-up questions, probing, and clarifying opportunities. The interview protocol for the first interviews is in Appendix C. Then, approximately three to four weeks later, a second interview was conducted asking a separate set of questions, building from, and connected to the first set of interview questions (Appendix C). Additionally, this second interview allowed for follow-up questions that might have surfaced from the initial interview. Following the second set of interviews, all interview recordings were transcribed by a translation software and reviewed to ensure accuracy and clarity. Participants received a copy of the intake summary to confirm the accuracy of the information or to add any items of clarity and to ensure no portion of the summary exposed or broke confidence of the participant. This

member check helped assure trustworthiness in the study (Shenton, 2004). The member checking also provided an opportunity for the participant to ask questions or provide additional information about patterns observed or inferences made by the researcher.

### **Data Collection**

Based on Creswell's (2014) data analysis and collection methods, the first step of the process is to collect the data. Data were collected by meeting with participants in one-on-one interviews. During data collection, I recorded memos about the participants responses that might offer additional insights about participants. Additionally, these memos included statements, descriptions, and responses from the participants to identify patterns and themes during data analysis (Creswell, 2014). To ensure the quality of the study, I used indicators of quality as outlined by Tracy (2010), which include the study (a) was a worthy topic, (b) was rigorous, (c) was sincere, (d) was credible, (e) reached resonance, (f) makes a significant contribution to the field, (g) was ethical, and (h) was meaningfully coherent.

Once recorded data was collected, I reviewed it to identify any inaccuracies the software transcribed incorrectly. The data were then organized to ensure it was labeled and assigned correctly. Prior to the coding process, all data was organized and stored in a secure location throughout the study.

### ***Pre-Interview Demographic Survey***

I conducted a brief demographic survey prior to conducting the initial semi-structured interviews that is listed in Appendix D. This was done to allow individuals to self-identify their interest in participating in the study and subsequently, based on completed surveys, identify potential participants for the study, based on the study criteria.

### ***Initial Semi-Structured Interview***

The first participant interview focused on addressing perceptions of how participants have experienced organizational learning within their institution and department. Specifically, questions probed about the participants' requisite knowledge necessary to do the job and what processes or activities they knew before in their position relative to what they had to learn once in the position. See Appendix C for a copy of the interview protocol for the first interview. The questions in this protocol were informed by both the Nevis et al. (1995) organizational learning framework and the Tynjälä (2008) workplace learning model.

### ***Second Semi-Structured Interview***

I interviewed the same participants 3-4 weeks after the initial interview to follow-up on any specific patterns that emerged through data analysis that was conducted from the first interview data. As I became more familiar with the data and examined my own reflexivity and positionality with the phenomenon being studied for this research, I produced additional interview questions based on this knowledge from the initial interview. Given that reflexivity and reflective commentary provides rich detail and are vital for increasing credibility of the study, this process informed additional questions for the second interview (Shenton, 2004) to the pre-established ones in Appendix C.

The second semi-structured interview questions were designed to connect elements of the participant experience more specifically with elements of the Tynjälä (2008) workplace learning model, which includes the seven learning methods. The questions developed in this study were designed to move from investigating and understanding perceptions toward understanding the specific methods and processes used by the employee to advance and facilitate learning for each participant.

## **Data Analysis**

Data analysis is often considered the most important part of the research study because it focuses on identifying patterns and drawing conclusions from data collected (Creswell, 2014; Creswell & Creswell, 2018). In this study, the interpretive method of thematic analysis was used to identify, analyze, describe, and organize themes that emerged from the data (Nowell et al., 2017). This method of data analysis is ideal for examining the perspectives of participants and highlighting similarities and differences of semi-structured interviews and participant job descriptions. To achieve the results for interpretation of the data, thematic analysis involves six steps: (a) becoming familiar with the data, (b) generating initial codes, (c) searching for themes, (d) reviewing the themes, (e) defining the themes, and (f) writing up the analysis (Braun & Clarke, 2006).

The Nevis et al. (1995) organizational learning three-stage concept provides an understanding of organizational learning as it pertains to how knowledge is acquired, shared, and utilized; and the Tynjälä (2008) workplace learning framework guides the research in what manner or process learning occurs for staff. Becoming familiar with the data included several reviews of the interview transcripts for a baseline understanding of initial patterns and similarities between newer employee participants and more tenured participants as well as similarities and differences of their job duties. According to Braun and Clarke (2006) the next stage of thematic analysis is to generate codes. For this study, a priori codes were used based on the Tynjälä (2008) workplace learning framework and the primary research question. Emerging codes were developed after reviewing the transcripts. All codes were placed into Dedoose to allow for computer-assisted coding.

Thematic analysis included both deductive and inductive coding to identify, analyze, organize, and describe and report specifically identified themes (Nowell et al., 2017; Saldaña, 2013). This holistic method is ideal for qualitative research that includes interviews and, in some cases, focus groups, to gather data (Nowell et al., 2017). A code book was created based on initial patterns that emerged from the pilot interviews in tandem with guidance from the theoretical frameworks. See Appendix E for a copy of these codes. I put the a priori codes into Dedoose. Testing of the a priori codes, following IRB approval, was completed to capture any emerging codes that appeared early in the process during the initial interview.

Both deductive and inductive coding took place as part of the coding processes. Deductive coding is the process of using pre-established, or a priori codes, based on the theoretical framework of the study; whereas inductive coding is the process of assigning codes as they emerge in the data (Bingham & Witkowsky, 2022). The first round of coding took place through deductive coding, based on the a priori codes. The second round of coding took place after deductive coding occurred and those codes were assigned to segments of deductively coded data that identified additional aspects of the Nevis et al. (1995) organizational learning framework of knowledge acquisition, knowledge sharing and knowledge utilization. For example, coding of formal and informal knowledge sharing, which answers the expanded research question of: What type of knowledge sharing mechanisms are in place to facilitate knowledge sharing for staff? were developed to distinguish formal learning methods from informal learning methods. The data inductively revealed both formal and informal ways in which this was occurring, which was not included in the a priori codes but only implied. As such, it allowed me to delve more deeply into knowledge sharing and the methods for sharing what has been learned, in both formal and informal settings. In summary, both deductive and inductive



coding processes allowed me to code interview transcripts that corresponded with both the primary and expanded research questions and the conceptual frameworks.

Themes were developed through thematic analysis from the coded data. The process of thematic analysis occurred in two parts. First, I reviewed the coded data for patterns among the codes and grouped similar codes together to form an initial theme. For instance, a priori code ‘doing the job itself’ manifested several consistent patterns of learning based on the interviews. The theme therefore was identified as learning through discovery. Through thematic analysis, I identified themes and patterns that connected the collected data with both learning frameworks. The selection criteria for participants with no more than three years of experience provided an opportunity to understand the collective experiences of participants within this range of time when employees are learning how to do their jobs and how differences may be found based on functional area, department structure, gender/race/ethnicity, and prior experience. Additionally, the one-to-three-year timeframe captures information still fresh on the participants’ minds about how they learned, and perhaps are still learning, how to do their jobs.

To address reliability, I had two doctoral-level colleagues serve as peer reviewers and each coded transcripts to support the reliability criteria. In this capacity, the peer reviewers reviewed the accuracy of the study with respect to use of the a priori codes and help confirm or expand the identify emerging themes. Moreover, they served as reviewers to ensure the quality standard is being met throughout the methods portion of the study, an important component of ensuring the trustworthiness criteria in qualitative research is met, as outlined in Tracy’s (2010) Eight Big Tent criteria.

## **Limitations, Delimitations, and Assumptions**

There are limitations to this study. Limitations are those aspects of the study which the researcher cannot control (Creswell, 2014). Consequently, the limitations place restrictions on the research results and conclusions (Creswell, 2014). Specifically, some of the limitations include the approach of limiting the study to only one institution. Also, the convenience of this location is a limitation in that it does not provide diverse institutional experiences. Similarly, the small sample size of 10 participants also present limitations as the results from this study can inform but could not be generalizable or applicable to every institution of higher education. Moreover, the limited studies on organizational learning and staff performance provide a scant foundation for the study. As well, there are certain environmental factors, such as supervisor qualities, leadership styles, and organizational cultures that can affect the level of organizational learning opportunities and processes experienced by different participants.

Limitations encountered by the participants also exist. Participants in this study could have been confined or restricted in their access to professional development or other learning opportunities due to COVID-19 restrictions based on certain university policies. Consequently, these types of restrictions could impact a participant's ability to participate in professional development, gathering in person to learn, or attend orientation or onboarding opportunities for their job. Additionally, the way they share information in a virtual format versus in a face-to-face interview may have an impediment on their learning experience.

Previous studies conducted on organizational learning at the individual level were conducted in corporate business settings and not higher education, thus there may be limitations of applicability in a different sector. And last, there may exist pre-existing constraints related to fear of disclosing too much information, cultural norms, individual values, or biases that,

depending on the participant, may prevent some participants from being able to respond in an open and honest way.

Similar to limitations, delimitations can also impact the results and conclusions drawn. This study is being conducted on one group of operational staff at a small public university. The study was designed to address organizational learning at the operational staff level only. There are other levels that could have been considered, such as mid-level leaders holding positions of associate directors, directors or executive directors. However, based on conversations with institutional leaders and human resource practitioners, it was suggested that studying administrative staff could result in research that could make a strong contribution to the field of higher education given the scant research on organizational learning for staff and staff development in higher education. I was also informed that administrative staff positions are much more aligned and similar in their roles versus the variability in roles and role functions that exists among mid-to senior level staff role.

Assumptions considered include the fact that any extant data retrieved to inform the study from the participating institution is accurate. Additionally, participants of the study can identify how they learned to do the job tasks and required activities in their new role. Additional assumptions include that those who consent to participate will be available for an interview and will provide accurate and truthful information. Finally, I assume that administrative staff learning contributes to the overall institution's ability to engage in organizational learning.

### **Ethical Considerations**

I have professional biases in the field of operational staff learning and development and the need for a deeper focus on this segment of the workforce within higher education. My experience as an executive director for 15 years in higher education is what sparked my interest

in organizational learning - specifically in higher education. Additionally, my previous role in higher education was closely related to organizational learning and development within the professional corporate sector. Prior to conducting the research study and generating data for the study, I applied to the university's Institutional Review Board (IRB) to gain permission to conduct the study, and provided each participant with a consent form, as required by the Board, which is included in Appendix F. Once permission was granted, and EDIRC training completed, I coordinated with the point of contact established by the university to distribute a letter inviting staff to participate in the research study.

### **Qualitative Quality**

Higher education research on organizational learning models is very limited. Moreover, there is scant research on the process of learning, stages of knowledge development, as well as workplace learning methods among staff employees as an integral component to improve organizational performance at colleges and universities. It is my hope that this study will shed light on the opportunities to leverage the capabilities of staff toward increased organizational performance and institutional effectiveness. I used Tracy's (2010) Big Tent criteria to meet the quality criteria. Specifically, the eight criteria include worthy topic, rich rigor, sincerity, credibility, resonance, significant contribution, ethics, and meaningful coherence (Tracy, 2010). I feel this is a worthy topic due to the scant research that has been done about the work of staff and their learning and knowledge building practices (Graham, 2012) in a higher education setting. Not much research has been conducted on how this knowledge is used to advance the core business of higher education and institutional effectiveness.

Achieving the criteria of rich rigor and sincerity was achieved by providing rich written detail from semi-structured interviews and very descriptive details and transparency throughout

the research process. A reflexive journal was maintained throughout the process to capture my thoughts, initial impressions, and any challenges I experienced during the research study. More importantly, throughout the interview process, I reflected on my positionality as a prior staff member, to address any biases. It was my goal to maintain credibility through rich descriptive details in the findings portion of the study as well as maintaining transparency throughout each step of the process.

All eight criteria were addressed as outlined in this proposal to allow the study to be conducted by another researcher. Techniques to enhance internal validity included reflexivity throughout the study, triangulation with multiple sources of data, member checks, and a researcher as instrument document (Tracy, 2010).

Other aspects of this qualitative research study include the need for triangulation of the data (Creswell, 2014; Denzin, 2000). Triangulation, the use of multiple measures, also adds rigor and richness to the study (Denzin, 2000), which is necessary to establish trustworthiness for qualitative research (Shenton, 2004). Artifacts such as job descriptions and training documents, were triangulated with the semi-conducted interviews.

### ***Researcher as Instrument***

I completed a thorough researcher-as-instrument document to identify biases that may affect the analysis, design, and interpretation of data and results (Watt, 2007). This is critical in satisfying the trustworthiness and validity standards. The use of reflexivity throughout the study helped me in addressing my biases. See Appendix G for a copy of this statement.

### **Outcomes of the Study and Expectations**

Prior to working several years in higher education, I had little exposure to its organizational structure from an employee's perspective. However, this may not be the case with

participants who come to an institution of higher education with prior experience at a different university. This organizational learning study helped reveal insights as it pertains to how staff learn and build knowledge within organizations. I suspected that any learning that was happening was self-directed and came from a place of individual curiosity. It is my observation, having worked in the higher education setting, that a reliance on knowledge sharing between colleagues is heavily used to learn specific details of the job. Moreover, in my experience, this is also the case regardless of how familiar someone may be with the role type and workplace setting. I also suspect that organizational learning among staff may vary between academic units and undergraduate and graduate programs and may also depend to some extent, on cultural aspects of departments and their department leadership.

Many organizational learning research studies and reviews of the literature touch on other components of the concept to include social and cultural components as additional factors that influence and organization's learning capabilities. This study did not address the social and cultural characteristics, such as institutional norms, of the organizational learning construct, however, these aspects emerged in some ways from the interviews. It is my hope that people who read my study will develop a deeper appreciation for the work product and daily tasks completed by administrative staff. And that readers will walk away with an understanding of the technical aspects of organizational learning at the individual level and the potential to advance institutional effectiveness and organizational growth.

## **Summary**

This qualitative research study used a phenomenological approach conducted through the lens of social constructivism to examine the phenomenon of how employees learn how to do their jobs in the first three years of their employment. Two frameworks guided this study. The

first is the Nevis et al. (1995) organizational learning theory, which identifies the stages of organizational learning. The second is the Tynjälä (2008) workplace learning framework, which identifies the processes and methods an employee uses to acquire knowledge necessary to complete the tasks to do their jobs.

Further, this study attempted to examine the processes of learning at the administrative staff level within a university setting. The participants had a range of employment years on campus (between 0 and 3 years) and came from academic units and academic programs. Data collection included semi-structured interviews, extant data of job description and training documents. For data analysis, I used Dedoose, a web-based research tool used for coding data, to facilitate thematic analysis. Additional document analysis included a review of internal HR job descriptions from participants. Data findings and summary included rich thick description of the findings to include concrete detail within the context of each participants lived experience (Tracy, 2010).

## **CHAPTER 4**

### **CONTEXT: PARTICIPANT PROFILES AND JOB DESCRIPTIONS**

Prior to interviewing participants for the study, a pre-interview demographic survey was sent to all administrative staff at the university (see Appendix D). Individuals who met the study criteria were identified and invited to participate in the study via email. The pre-interview survey yielded 10 participants who agreed to participate. The following intake summaries provide additional information about each participant for context.

#### **Julia**

Julia is a fiscal administrative coordinator and has been in her current role for 11 months. Prior to this role, she held the position of administrative coordinator in the same department for seven months in a different academic unit at this same university. Julia works in a department where there are two other people who also have administrative roles similar to hers. She is the supervisor to one of those individuals and the other individual is lateral to her. Julia's role includes managing the department budget, tracking expenses, and making purchases for her department. She had minimal experience with budgeting when she entered this role, however, is now very comfortable using Microsoft Excel to manage the budget within her department. Julia has completed several classes at the university, some for leisure and others to expand her understanding of her role. Additionally, she has also completed some training sponsored by the university. Her previous work experience outside of higher education includes being a copy editor.



When it came to learning specific aspects of her job, Julia indicated she already had connections with individuals at the university who could help her with certain tasks. These connections were the relationships she had developed with her predecessor and the relationship she had in a previous job at the same university. However, when it came to learning certain university-based systems, she was not as familiar and often sought training on those systems. Her experience with university training was mixed. On the one hand, she attended a vendor-sponsored training that was not useful because the module included information that was not applicable to her role, and thus she felt it was not the best use of her time. On the other hand, she indicated the university's learning management system was helpful when she needed to learn how to use the purchasing system.

### **Eugenia**

Eugenia is the administrative and fiscal coordinator in one of the university's satellite campuses. She has been in her role for 11 months. Her previous work experience was in the hospitality industry. Eugenia did not have any work experience in higher education prior to accepting this role. Her primary duties include tracking expenditures, making orders, and paying the department bills. Additionally, she answers the phones, manages all department communications, and helps to manage the department's advisory board. Eugenia does not have any college credentials; however, she is very interested in taking classes at the university and has already participated in university-sponsored professional development. She is gaining familiarity with her role but indicated she was a little uneasy about managing an advisory board. Her supervisor is supportive about pursuing professional development opportunities and has encouraged her to be proactive in her learning.

Eugenia indicated one of the biggest barriers when learning how to do her job was a lack of experience working in a higher education setting. She felt this contributed to her limited vocabulary and understanding of university functions. For instance, she was not fully aware of what a registrar's office was responsible for nor terms such as an index number, for processing invoices. It was not that she had not completed similar tasks in her prior role, but rather, they used different terminology in her new job. Figuring out the terms, and who to go to for which offices and what those offices did—was a very high learning curve for her.

### **Kevin**

Kevin is a fiscal and administrative coordinator and has been in his position for 9 months. He has several years of previous higher education experience. His co-worker, who also holds the same role in his department was hired 6 months prior to him. When Kevin began in this role, he already knew several of the software systems that this university was using because they used similar systems at his previous institutions, albeit with different names. His daily tasks involve purchasing items, accounts payable, reconciling credit cards, travel reimbursements and various other accounts related activities. His primary customers are the research faculty in the department. Kevin says that he gets along well with his colleagues and that the entire team is very collegial and works well together. Kevin said that he is also the unofficial “IT guru” for the office. Kevin prefers to learn by using step-by-step instructions with complementary diagrams to match the instruction steps. Kevin has bachelor's and master's degrees.

When it came to learning how to learn something for his job, Kevin indicated that his department was very organized around processes and did a lot to maintain accurate departmental operations manuals. Consequently, he had more departmental resources than many other participants when first starting their job. Kevin used several of the same systems at his previous

institution. However, he noted he was still learning the nuances between systems, and frequently reaches out to his supervisor or someone in his office to learn how to do certain things. For instance, the procurement software was very similar, but at this university, there are certain functions that the university will not allow him to perform—and that is the area in which he spends a lot of time learning more information.

### **Monica**

Monica recently moved to the area and worked in a different industry for 25 years prior to accepting her current role. She has not worked in a university setting before but has found many of the administrative tasks in her prior position to be similar. She holds the position of administrative coordinator and works primarily at the front desk in a high traffic area in her department. Her primary duties include speaking with parents and students over the phone and in person and answering questions about the services her department provides. She also performs other administrative functions such as checking department emails and managing the department activity calendar. Monica has a bachelor's and a master's degree. Monica believes that her previous job is what allows her to view life from multiple perspectives, which she indicated, has given her the ability to make a smooth transition into her current role. Monica is committed to making the most of the university setting and learning as much as she can.

As it pertains to the type of learning she seeks to perform at her job daily, Monica indicated that 95% of her job requires answering questions from students and parents via email and phone. Parents call a lot at the beginning of the fall semester about the costs of certain services for their students. When she does not know the answer, she turns to her supervisor for answers. Her supervisor as well as other staff will help her if she has questions. Monica is very

organized and keeps a binder with commonly asked questions to help her respond accurately to parents and students.

### **Donna**

Donna has been in her role two months, which is the shortest amount of time in service compared to the other participants in this study. She is one of three administrative assistants in her department. She provides a wide variety of academic support to the faculty in the academic unit where she works such as photocopying, printing seating charts, and editing documents.

Donna has no prior work experience in a higher education setting but has prior experience as an administrative assistant. Donna indicated that her preference for learning is to watch YouTube instructional videos rather than reading an operating manual that explains how to do certain Microsoft or Excel functions of her job. Similar to Kevin, she too uses a shared document system within the department to see how previous departmental tasks have been completed before she reaches out to an individual for assistance. Additionally, she did receive some informal training from her supervisor in the first few days of her tenure in the role as well as HR training that pertains to the university.

One aspect of Donna's job is to format documents for faculty. Although she came to the role with experience using Microsoft Word, she had to learn how to use it at a much higher level. For instance, she was expected to learn how to format documents and use a lot of special formatting and editing functions she did not initially know. Consequently, she found herself turning to YouTube videos to learn more advanced functions in Microsoft Word. Another tool she had to learn how to use was the university's shared filing system called Box. She had never heard of this before and sought Internet resources to learn how to use it.

## **Beth**

Beth has the title of administrative manager and has several years of experience working in a higher education setting both at this institution in a different department several years prior, and at another institution. She has been in her current role for 3 years. Like Kevin, most of the customers in her department are research faculty. Her primary duties include procuring items for faculty research, managing the budget, and grant management. She works very closely with her department chair and serves as the point person for many other administrative coordinators at the institution. Beth enjoys her job and takes advantage of professional development opportunities that can help her do her job better if she can accommodate them. Additionally, she has taken some leadership classes at the university to help her lead more effectively in her department. Beth has a bachelor's degree and has completed graduate level coursework.

Beth said she is still learning how to properly manage grants for her department. She is still working to learn all of the different requirements she must manage, so that their department grants are not in jeopardy of being lost. When she has a question, she reaches out to her network of administrators who also manage grants, to see if they can help her learn what she needs to know.

## **Savanah**

Savanah is a fiscal and administrative coordinator and like Beth, has held previous positions in a higher education setting. She has been in her role for 6 months but did not receive any onboarding or training from anyone in her department nor from the previous person in her role. Savanah manages the day-to-day administrative requirements of the academic unit where she works. For example, she orders supplies, manages research budgets for faculty, and sorts and distributes the mail. She enjoys working in an academic setting. Her values are closely aligned

with the mission of the university. Although Savannah does hold a college degree, she indicated that the knowledge she has gained from her work history in educational settings has helped her most in understanding and being successful in her current role. She is also quite familiar with the university's procurements systems as well as Banner. She enjoys interacting with faculty and other colleagues in her department on the days that she doesn't work from home.

A large part of Savannah's job is managing the fiscal component of her department as it pertains to spending for academic purposes. She indicated that she is still learning the policies for which human subjects can be paid and which ones cannot. Or what the faculty are allowed to purchase with their funding versus what they can't purchase. When she has questions, she reaches out to other administrators in her network to find the answers.

### **Autumn**

Autumn has been in her role as administrative assistant to the associate dean for 3 years. She did not experience working in higher education prior to joining the institution but was interested in the position because of her passion for the unit's primary focus area. Her primary duties include keeping track of the office budget and managing the associate dean's schedule. She manages travel reimbursements orders supplies and coordinates events within the department. Unique to Autumn is her role as the unit representative and officer on a university-wide committee, which consumes a great deal of her time. Serving on these and other related committees is important to her and has put her in touch with other people on campus where she has been able to build relationships with people outside of her department. Autumn has a master's degree and was hired just prior to the COVID-19 pandemic. She is the only person in her department that has administrative responsibilities and consequently, she relies on individuals outside her department when she needs assistance with certain job-related tasks.

Although Autumn has been in her position for three years and she said she is still learning how to process travel reimbursements and track expenses for her department. One reason she said she is still learning how to do this, is because she does not do this work often, and each submission is different. She is also still learning the guidelines for what can be reimbursed from what cannot be reimbursed. When she needs help learning what to do, she usually goes to the university's learning management system.

### **Pippa**

Pippa is an administrative coordinator and has been in her role for three years and, like Autumn, was hired during COVID-19. She has no experience working in a higher education setting but has several years as an administrative assistant in her prior job. Working in a university setting has been a passion of hers. Her department is small and consists of only three people, including her supervisor and another support person. She is responsible for maintaining the day-to-day activities and request for training programs that her office is responsible for conducting. Pippa was very familiar with Microsoft Office applications and took the required training on university systems that the human resources office made available to new hires. With the support of her supervisor, she is interested in taking additional training that is offered by the university as soon as her schedule allows her to do so.

Similar to Autumn, Pippa is still learning how to become more proficient at using the university's procurement software and Banner. She too does not use them often and finds herself re-learning how to do things. When she needs help learning how to do something she reaches out to the department directly to help her when she gets stuck. In addition to these areas of ongoing learning, she is also learning how to use the website software so that she can maintain the department website. These are the primary areas of her job that she is still learning how to do.

## **Morgan**

Morgan has several years of administrative experience in a higher education setting. Morgan is the department administrator and performs a variety of administrative duties to include tracking expenses for the department as well as academic scheduling. She has been in this position for three years. She also responds to general department questions, manages the department calendar and speaker events that are conducted through her office. Morgan received no departmental onboarding and has relied on the assistance from other administrators at the university to guide her in many aspects of her job responsibilities early in her tenure. In her role, she supervises students and is the primary point person for the department through which all outside university agencies and business units interact. Due to her work experience at another university that used similar systems, she came into the role with intermediate knowledge of several systems she was required to utilize. Morgan has a bachelor's degree.

Morgan is proficient at routine procurement functions. However, she indicated that she is still learning how to process more complex items in the university's procurement system, she said she's "pretty paralyzed." If she needs help learning how to complete a task in the procurement system, she will sometimes contact the procurement office or a colleague in her network of administrators.

### **Job Descriptions: Setting Role Expectations**

Formal job descriptions are provided to each employee after being hired at the university and are divided into multiple sections to include position classification details, position details, job duties, physical demands, and budget information. For this study only three components of the formal job description were examined to gain a clearer understanding of how the roles compared for similarities and differences between the various roles held by the participants. As



noted earlier, this section of the research study is provided for context only and does not reflect any findings of the research study but rather demonstrates the diversity of participants interviewed.

The three areas of the job descriptions were classification details, position details, and job duties. The classification details on the formal job description provide the employee with their state employee pay code, role code, and role title. Position details provide the employee with the university job position number, position title, employee identification number, position summary and primary responsibilities of the role. And finally, job duties outline the primary job duties assigned to the position and an estimation of time given to each function of the job.

Each participant's formal job description was reviewed as extant data to evaluate two things. The first evaluation was to compare job duties across all participants for outliers within the formal job description. This examination of job duties was important because any outliers could impact what methods or activities a participant uses in their learning process. The second factor I evaluated was to compare interview responses with job duties listed on their job description. This analysis was done to identify any outliers in the responses that may have been inconsistent with their job duties. And last, job descriptions provided an opportunity for probing questions for participants. After conducting the parallel analysis, I concluded that only Autumn spoke about one task that was not listed on her formal job description. This task requires her to be the sole representative from her department on a campus committee. She indicated that she spends a great deal of her time completing tasks for this committee in addition to the job duties outlined in her job description. Although she ostensibly volunteered to serve on the committee, she has made a lot of contacts with other employees in various academic units and has built a strong network as a result.

Another observation from the analysis of job descriptions showed that Monica and Donna were the only two participants whose job duties did not include fiscal, budget, or procurement responsibilities compared to the other eight participants who had fiscal and budget responsibilities in varying degrees. This distinction is important because participants with fiscal, budget or procurement responsibilities often had to turn to an internal network or department on campus for assistance in learning to do certain aspects of their job related to money. However, for Monica and Donna, their primary methods of learning relied on external Internet resources, such as YouTube, department procedure guides, or making personal notes to keep track of a process.

Table 1 provides an overview of these three categories of job descriptions and outlines how they compare to one another across participants. Position titles among the group range from administrative assistant, fiscal and administrative coordinator, administrative coordinator and one administrative manager. All participants held the same position classification role title of “Admin & Office Specialist III” except one, with varying degrees of responsibility. Monica’s position classification was “Admin & Office Specialist II”. Recall, this classification is generated by the state and not the university, which means that the university may not have much latitude to adjust.

**Table 1***Overview of Participant Job Descriptions*

Name	Classification Details	Position Details	Job Duties
Autumn	Admin & Office Specialist III	Asst. to the Assoc. Dean	Manage office budget, website updates, advisory & admin support, records maintenance, calendar management, communications, editing reports
Beth	Admin & Office Specialist III	Administrative Manager	Fiscal & grant administration, procurement, admin & personnel services, records management, chair/director support, office management, administration of graduate programs
Donna	Admin & Office Specialist III	Admin Assistant	Provide admin support, create and maintain work logs, file management systems, troubleshooting office equipment, order supplies, maintain inventory, take board meeting minutes
Eugenia	Admin & Office Specialist III	Admin & Fiscal Coordinator	Manage office budget, provide admin support, manage business operations, coordinate correspondences, maintain volunteer database, manage dept. website, manage physical office space
Julia	Admin & Office Specialist III	Admin & Fiscal Coordinator	Manage office budget, admin support, manage business operations, procurement, student financial aid
Kevin	Admin & Office Specialist III	Fiscal & Admin Coordinator	Operational & fiscal support for staff, faculty, and affiliates, procurement, monitoring fixed assets, administering state and local grants and foundation funding
Morgan	Admin & Office Specialist III	Admin & Fiscal Coordinator	Fiscal admin procurement, admin & faculty personnel services, general support, scheduling/registration, communication, records management
Monica	Admin & Office Specialist II	Administrative Coordinator	Front-line manager/reception, center operations, student staff supervision, general admin work, special event planning, travel coordinator, records management
Pippa	Admin & Office Specialist III	Administrative Asst.	Fiscal responsibilities, admin support, general office support, office management, event coordination & support
Savanah	Admin & Office Specialist III	Fiscal & Admin Coordinator	Fiscal admin, financial management, admin support, procurement, purchasing and asset management

*Note.* Admin = administrative; Asst. = assistant.

At the time of this study, the university employed approximately 242 part-time and full-time administrative staff, of which 92% identify as women and 6% identify as men.

Additionally, the racial demographics of this segment of the workplace includes approximately 12% assistants of color. They do not track multi-ethnic groups. Table 2 shows an overview of the demographic details of employees who participated in the study based on their gender and ethnic/racial self-identification and higher education and administrative experience. The demographics of the participants closely represent the university's full-time administrative staff population. The table also includes the participants' prior administrative experience, time in their current position, and prior experience in higher education.

**Table 2***Overview of Participants*

Participant Name	Demographic Details	Administrative Experience	Tenure in role	Previous H.E. Experience
Autumn	African American Woman	No	3 years	No
Beth	White Woman	Yes	3 years	Yes
Donna	White Woman	Yes	1.5 years	No
Eugenia	White Woman	No	6 months	No
Julia	Multiracial Woman	Yes	11 months	Yes
Kevin	White Man	Yes	9 months	Yes
Morgan	White Woman	Yes	3 years	Yes
Monica	African American Woman	No	4 months	No
Pippa	White Woman	Yes	3 years	No
Savanah	White Woman	Yes	6 months	Yes

*Note.* Asst. = assistant; H.E. = higher education.

**Learning to Work in Higher Education**

Tables 2 and 3 show varied differences and similarities among the participants. Most notably, was the difference in level of confidence and preparedness when navigating the higher education landscape. For instance, participants who had no prior experience working in higher education had a much steeper learning curve compared to those who did when it came to learning how to do their jobs. Pippa and Eugenia both came from different industries prior to joining working at the university. Eugenia shared that she had never even heard of her department before joining the university and the function of her office was new to her. So, at a

baseline she was learning both how to do the day-to-day tasks as well as gain an understanding of the department's function within the university's structure.

Pippa and Eugenia shared that sometimes they did not know or understand certain key terms such as index codes, that a university was made up of various academic units, or guidelines that govern state purchases. In their prior roles, the processes for purchasing items were completely different. By contrast, Morgan and Beth both had prior experience in higher education. When it came to learning their jobs, Beth stated that she felt she was at an advantage, because she had previous experience in higher education and knew which departments to contact if she did not know something. Additionally, Morgan also pointed out that she had colleagues at the university prior to her arrival due to connections made in her prior work at another university. And, that they became an immediate resource for her.

Further examination revealed participants in the study had a wide range of administrative work experience. Additionally, half of all participants had experience working in a higher education setting prior to their current position. Participants also had varied educational backgrounds to include some with no college, bachelor's, or master's degrees. All 10 participants are full-time employees and were selected based on the parameters of the study, which included employees with zero to less than four years of tenure in their current role. All 10 employees have the option to work from home at least one day based on supervisor approval.

## **Summary**

The overview of participants in this chapter provides context for understanding who they are as individual administrative assistants and the different range of experience and backgrounds in which they started their jobs. Further, it highlights the similarities and differences of their job requirements and the degree with which individual knowledge building needed to occur. In

Chapter 5, I will discuss the findings from this study and examine more closely the opportunities to advance learning capabilities among administrative staff.

## **CHAPTER 5**

### **FINDINGS**

The purpose of this research study was to examine the formal and informal learning processes that administrative staff use to do a new job in their first 3 years in the position. The research question for this study—What are the perceptions of how administrative staff in higher education learn how to do their jobs?—was designed using a phenomenological strategy for data methodology due to its ability to surface concerns, to expand my understanding of the individual’s lived experiences, and to provide a platform for individual staff voices to be heard. Operating from a social constructivist paradigm, the study further sought to discover how individuals socially construct their understanding of what is expected of them at work and how they effectively navigate the higher education environment to obtain and use knowledge for task completion. Although the results of this non-positivistic research strategy are not statistically generalizable, they might be theoretically generalizable for illuminating the importance individual task learning processes in the higher education workplace in future research (Hammersley, 2008).

To answer the research question, I generated data through two in-depth semi-structured interviews with 10 administrators and collected corresponding artifacts of individual job descriptions as parallel sources of data. Job descriptions were not coded but provided context in the previous chapter to identify any outliers among the sample in terms of their job duties and to ensure that the types of duties and tasks described by the participants were consistent with the



specific duties assigned for their role as described in the job description. The job descriptions also aided in additional probing questions during the interviews.

I interviewed 10 full-time administrative staff about their perceptions of how they learned to do the tasks required of them within the first three years of occupying their role. I met individually with each participant for two separate interview sessions. The first interview session focused on establishing a baseline of understanding about the specific job tasks, what job-related knowledge they had before taking the position and job expectations, from the participants perspective. The second interview focused on knowledge processes and structure specific questions to gain a deeper understanding of their roles as related to the specific stages of the knowledge acquisition, knowledge sharing, and knowledge utilization. These interviews were transcribed using transcription software and then reviewed several times to identify patterns that emerged early in the research. Corrections were made that the transcription software omitted. Reflexivity was ongoing throughout the interview process so that I stayed in a position of introspection and to evaluate my own biases and avoid any potential bias in the study. Additionally, member-checking was ongoing, and memos were taken in tandem with or following each interview to capture immediate insights from the participants.

### **Essence of Learning Tasks for a New Position: Supporting Staff Learning**

There were several shared experiences and commonalities among all 10 participants that contributed to the essence of their experiences of learning how to do their new jobs. By comparing codes from the semi-structured coded interview transcripts, and memos taken during the interviews, I was able to identify shared experiences that existed for all 10 participants. For example, all 10 participants said that they really enjoyed the work that they perform in their roles and noted the importance of a college education as a societal good.

Participants also stated that they enjoyed working in a college setting and interacting with students and the general culture of the campus environment. Two of the participants, Pippa and Savannah, had no formal college degree and said they looked forward to taking classes at the university when the time was right. Autumn, Monica, Pippa, and Caty had never worked in a higher education setting prior to joining the university and enjoyed working in an environment that promotes learning and education. Beth provided the following comment as an illustration, “I, you know, I do enjoy my work and I, I take a great sense of pride in it.” Monica also spoke about the positive feelings she had about her work, and said, “because where I am now, this office, I really enjoy it.” And Eugenia echoed a similar expression about her role, “I really like this job.” Thus, a shared experience for all was the sense of fulfillment they felt in their work on campus.

Shared experiences emerged in considering the full range of the research questions, which asked: (a) what aspects of the job did staff feel prepared to do when starting their job? (b) what type of knowledge sharing (formal or informal) mechanism(s) are in place to facilitate knowledge sharing for staff, if any? and, (c) what informs the development of staff learning? The essence of the finding for the first sub-question (What aspects of the job did staff feel prepared to do when starting their job?) included two parts. First, participants felt prepared when starting their job due to their proficiency with Microsoft Office programs, such as Word and Excel; and second, due to their prior experience with general office duties such as answering phones, writing memos, and coordinating calendars. Requirements of the new position included tasks that are common across most entry administrative positions and gave the participants feelings of confidence in their ability to do their new job. As highlighted in Chapter 4, all the participants had prior work experience, albeit outside of higher education for some, that gave them foundational knowledge they could tap into in their new roles. For example, Pippa had no prior

experience working in higher education; however, she indicated that her experience as an administrative assistant in prior years gave her the foundational knowledge, she needed to do her job. For Pippa, the foundational knowledge included essential administrative duties such as answering the phone, scheduling appointments, and coordinating events.

The essence of the participants' experience regarding the second sub-question (What type of knowledge sharing (formal or informal) mechanism(s) are in place to facilitate knowledge sharing for staff, if any?) revealed that the most common type of knowledge sharing mechanisms utilized by participants was through Microsoft Teams instant messaging, through informal networks, and through one-on-one conversations and direct and indirect guidance from a supervisor. For example, Kevin shared that his primary guidance for learning how to do his job has come from his supervisor. She frequently shares her screen with Kevin to walk him through certain tasks he's trying to learn. As well, Beth will quickly jump on Microsoft Teams to ask someone in her network how to do something if she does not know how.

The participants held shared experiences regarding the third sub-question focus on What informs the development of staff learning. Here, there were three primary forms of training that the participants accessed in their learning. The three types of development included: (a) training offered by a department that's initiating a new or existing operational system, (b) training offered by a vendor, and (c) training through the university's learning management system. An example of training by a department on campus would be a department that is introducing a campus-wide software system that staff are now required to use. Beth spoke about the new procurement system that was recently initiated at the university. The sponsoring department offered scheduled training as part of the software system roll-out. Additionally, Julia shared her experience with vendor sponsored training in which she enrolled. The training was not required but the university

partnered with the vendor to provide training for staff who were interested. And training through the university's learning system Cornerstone, was frequently used by participants as formal training on a variety of university programs such as how to use Chrome River, process invoices or ship an item.

## **Research Findings**

The collective experiences of how administrative staff do their jobs revealed several themes about organizational learning in the workplace at the individual level. These themes serve as the framework for how findings of this study are reported. Additionally, these study results provided a rich understanding of their daily lived experiences within the context of organizational learning in a higher education setting, as noted in part in the coverage of the essence of their experiences in the section above.

As it pertains to the primary research question of how new administrative staff learn how to do their job, four themes emerged. The first theme, learning through discovery, describes methods the participant proactively took to learn how to do the job on their own with no pre-planned instructions or guidance. The second theme, learning from prior knowledge, describes using previous work experience to learn or aid in completing tasks. The third theme, learning through training and development, is described as learning that occurs through formal means such as learning in an academic or professional development setting. The final theme is learning through collaboration, which is described as using technology or individuals as resources to facilitate one's ability to complete a task or learn how to complete a task. The research findings outlined in this chapter are divided into four sections and draw directly from the experiences of each participant as they described it. The chapter concludes with a synthesis of the findings.

### *Learning Through Discovery*

All 10 participants in this study considered learning by discovery a key process by which they learned how to do various aspects of their jobs. In this study, learning by discovery is defined as the proactive steps taken by the participant as a first step to learn how to complete a task using available resources with little or no direction.

**Indirect Guidance: Learning Through Interacting.** Learning by discovery was achieved in several ways. First, participants learned by indirect guidance from another individual that provided one-on-one direction after being approached for assistance. In this scenario a participant would approach an individual that could point them in the right direction for assistance or might have some tangential knowledge to share. For example, Monica stated that she is still developing her informal network, but she often starts by asking her supervisor or someone in a similar office. Here, she's not receiving specific directions about performing the task, but rather, guidance on where she can go to get the answers she needs. The information she gets from that individual is helpful and was frequently how she learned how to do her job in the early stages of her tenure.

In another scenario, learning by discovery took place through proactive steps such as emailing an individual or using Microsoft Teams instant message feature. In this scenario, a participant would contact an individual that could give them direction or guidance on how to complete a task. In this study, some participants stated that identifying an individual for indirect guidance was sometimes difficult because one typically does not know very many people when first starting a new job. Beth summed it up nicely:

I would say that there are several mechanisms [like emailing or MS Teams] for knowledge sharing, but only if you know somebody you can call. If you're new, you're not going to know any of the other admins and you're not going to have that capability.

A critical first step on the learning journey for new employees becomes establishing a network to tap for emerging questions about work processes.

When Pippa needed to learn something to complete the tasks for her position, she sought guidance from another staff person at the university to obtain the knowledge she needed to accomplish a task if she could not figure it out on her own. She reflected,

And I may get on their nerves over in procurement and accounting or wherever. But I'm not afraid to ask a question if I don't know something, if I can't figure it out, I will try to figure it out before I ask, and I will try to, you know, try to get it done. But if I can't, and I know that because of what it is, usually the financial stuff, I don't wanna mess that up. I will ask and they will help me work my way through it, so.

Thus, while Pippa looked to discover how to do things on her own, when this independent discovery did not work, she sought the help of others for direction.

Building from indirect guidance to learning from a colleague was learning through cooperating and interacting with colleagues through pre-established communities of practice. Here, community is defined as interactions with small groups of individuals who have similar functions and can provide informal training or assistance with certain tasks. When learning through discovery to complete tasks they did not know how to do, most participants tried tackling the task first on their own without asking anyone, and then turned to other methods or resources to help them learn.

**Independent Learning.** Another method of learning through discovery included self-directed activities, such as searching the university's website, a department website, the Internet or using YouTube. Learning through discovery also occurred by taking an online course through Cornerstone, the university's learning management system, or through trial and error. In some cases, participants would use aids such as charts or post-it notes to organize a process for learning how to do a task. In this instance, learning was self-reliant once the pre-established method of learning was used.

Donna made several references throughout her interview that her first go-to for learning a new task was using YouTube. She commented, "I'm utilizing YouTube and just trying to, to work on this project myself to see if I can learn anything, you know, to help get the process going." For Donna, using YouTube to learn is helpful, because she prefers learning on her own by watching a visual representation of how something is done. Autumn also approached learning new tasks independently when she needed to learn something and noted how she would try to figure it out on her own first without asking anyone. She provided this example: "I usually start with trying to figure it out myself because I'm the type of person that I try not to bother other people because everybody's so busy. So, I start by trying to figure it out myself." Both Donna and Autumn used trial and error to first try to figure out new tasks by themselves.

Many participants shared the same experience scenario of how they completed tasks they did not previously know how to accomplish, by trying first to figure it out on their own. Kevin put it this way:

I try to not bother my supervisor, so I'll probably try to figure it out first, but then I get, if I get to a dead end, I'm gonna go to my supervisor. And then if they're like, I'm not familiar with that, then I'd be like, all right, I'll figure out who on campus to go talk to

about it and they'll tell me the proper way to go about that. And then I'll go to the web site.

**Departmental Guidance.** While many participants tried to do tasks without assistance, others went directly to the department that managed the process when they could not figure out the task independently. This process was used by participants who had previously worked in higher education as well as those who did not. Participants sought out others to help them discover how to learn doing new job functions. Savannah provided this example:

The department offers Wednesday office hours. So, I used to go to office hours and just listen to people and share my problems. So, they're pretty good about getting back with you and then they offer those office hours. So that's really nice because there seems to be lots of questions about [the online purchasing program]. I do a lot of transactions in there and it's just they have online guides. Even then I'll bring it up on one screen. I try to follow it, but it's just hard to follow instructions and look at it about one time. So, I do ask them a lot of questions.

Learning through discovery was self-initiated and accomplished through individual actions and hands on practice versus passive learning.

In addition to these processes for learning how to do the job, others said that just jumping in and doing the job is their primary method of learning. This learning by doing is consistent with the Tynjälä (2008) workplace learning framework and Knowles' (1984) adult learning theory. Eugenia described this learning by doing this way: "I would say that, doing things, you know, the hands-on experience, being actually in it and completing tasks and, you know, not being afraid to mess up. It's really just doing it. That helps me." This approach to learning on the



job without any direct guidance was the preferred approach for the participants and was based on their personal preference for how they like to learn.

Learning through discovery occurred in multiple ways and was driven by self-motivation and independent actions. Participants received indirect guidance after reaching out to someone by email or instant message, searching a university or department web site or YouTube search engine, or by trial and error. Even though not all the participants worked in higher education prior to their current role, all found individual methods that worked best for them based on the type of learning they were trying to achieve—including those who did have experience working in a university setting. Learning how to use certain functions in Microsoft Word or Excel was generally self-taught via YouTube or the Internet. However, learning how to complete tasks in university-based systems often required reaching out to an individual for guidance or searching a department web site to locate information they needed.

### ***Learning From Prior Knowledge***

In addition to learning through discovery as a primary learning process, learning by drawing on their prior experiences was also determined to be a primary method by which several participants sought to achieve learning how to do tasks at their new job. In this research study, learning through reflection involved using prior or current knowledge the participant had prior to obtaining the job, to aid in completing tasks. This knowledge could come from a participant's prior work experiences with reflection on those experiences helping inform how the participants drew on that knowledge to complete a task. The reflection used in this approach to learning drew from prior experiences and could include previous work experience in a higher education setting, or transferable skills from a non-academic setting, or knowledge from prior training or

professional development. It could also be the awareness one develops while doing a task that did not previously exist.

Many participants used reflection that drew from their knowledge base as an approach to learn how to do their jobs. They described various ways in which their reflection led them to an awareness of understanding about how to complete certain tasks or how they were comfortable with certain tasks because of prior experience. For example, Monica stated it this way:

The only aspect of my role that I could say that I was extremely comfortable with was answering the phones or phone etiquette, because of my previous career. So, it's just being very comfortable speaking with all people from all walks of life over the phone. So, answering the phone I was extremely comfortable. But other than that, I had no background in higher education.

Monica drew upon her prior experience to apply to the new job tasks she had. Others who had an administration background or more experience in an administrative role like Autumn, articulated their prior experience and how they used it this way:

So, the, the basic administrative functions of, you know, emails, follow up phone calls correspondence, drafting official correspondence, searches for background information basic information about systems – those type of things I was familiar with because I developed those skills from my previous job.

As adult learners, the participants reflected on and drew from their past work to help inform how they did their current job responsibilities.

Consider how Eugenia shared how previous knowledge in a completely different profession helped her complete certain new job tasks. She stated:

I was a receptionist at a hair salon, so I understood ordering things and maintaining inventory. I knew about like, the ins and outs of scheduling, and answering phone calls. But other than that, like the big meaty pieces of my job I had no experience, no knowledge. And it was really just, taught over these last seven months now.

When asked what she feels helped her most from her previous job, she went on to say:

I would say the soft skills. I learned, in my, almost a decade of hospitality industry work of how to interact with people. I also learned how to do emails, time tracking, all those little pieces. As far as the role itself I actually didn't know really anything.

Reflecting on and drawing upon their prior experiences helped inform the parts of their new job functions related to common and repetitive administrative tasks such as answering the phone, responding to email, and working on correspondence, whereas participants need to learn in different ways the skills unique to their new administrative tasks.

Some of participants shared how their prior experiences working in higher education provided the basis for transference of knowledge to their new positions. For example, Kevin worked at a previous institution in an academic unit that he says provided him with baseline understanding not just of the role but also the systems and software that his current university uses. He stated:

I was attracted to this particular position because it had a lot of the job responsibilities and duties to which I'm familiar with in a college. This current university also uses some of the same software and budgeting programs that I've used in all my other previous institutions. So, I felt I'd have a leg up on the duties and responsibilities here. And you know, you, you buy things for one department, you've sort of bought them for every, you've learned how to do it, and it's just doing it at a different place for a different reason.

Knowing how to do certain tasks because they are familiar helped the new employees adapt to their new positions faster.

Two of the participants had worked at the institution before, left, and were now reemployed. In this case, their learning process was different because the previous role at the college helped them have a context for how to learn tasks. Yet, even this prior experience involved them learning new ways of working, as many of the processes and software systems had changed. Savannah describes her experience in this way:

The biggest thing would be learning how it's done in this academic unit, and how things are run. Because I've had past experiences where, you know, each place is different. So, I think learning and then since I had left and come back getting reacclimated to this institution, what policies have changed since I left, if any. I'm just getting reacclimated with the way things have done here.

All 10 of the participants indicated that they drew from prior experiences to help inform how they accomplished the job functions in their new positions. In some cases, prior experience helped with informal aspects of their job. Consider how Monica indicated she was very comfortable talking with a variety of people from all walks of life because of what she did in a prior job. This comfort level helped her perform parts of her job that require high levels of interaction with students and parents. On the other hand, other participants who had technical task specific duties relied on prior experience working with certain software systems or similar software systems like those used at this institution. Kevin referenced his prior experience using a university-based purchasing software to inform the way he learned how to use the one with which he currently uses. In summary, prior knowledge from individual job experience helped participants learn certain aspects of their job yet not all aspects of the job.

### *Learning Through Training and Development*

Another significant way in which participants indicated they learn about their new jobs in their first three years was by completing structured learning programs, such as training and campus development opportunities. Structured learning is defined in this research study as learning that occurs through formal means such as learning in an academic or professional development setting. All participants in this study indicated they participated in structured learning of some type. The degree to which participants responded about how much they learned through these structured experiences depended on the amount of experience they had doing the job and/or the number of years they had been in the job. Some of this learning occurred prior to the participants being hired at the university and other trainings occurred while in their current position. In many cases, structured learning took place through the university's learning management system, in a virtual or in-person classroom setting, or group setting and training or professional development.

Kevin shared that structured learning opportunities are frequently his first step to learn how to do more complex tasks that have multiple layers. He shared, "I'll go to the university's Cornerstone and see if there's training on that, if I don't know." Thus, while Kevin's approach was one of learning by discovery independently, the source of the learning was via a structured online training program. Here, his learning experience fell into both learning through discovery and learning through training and development.

Similarly, Julia took part in a university sponsored training at the university to help her in her new role and shared:

Usually, the HR or the dean's office or the budget office or whoever will like put out an announcement saying like, you know, there's this training that's going to happen. And so,

I go. Also, there's a supervisor institute. I had never supervised anybody before. And so, and it was like, it was a huge commitment of like 12 weeks, four hours every other week.

But I added that as well.

These formal in-person learning sessions allowed participants like Julia to expand their knowledge set. Other participants such as Morgan also agreed with the value of taking part in structured learning programs, and she commented on how she took various training sponsored by the university. Morgan said: "This academic year I've been to a training on travel, faculty hiring, student payment, and I think there was one or two others, but I don't remember them off the top of my head." Participants had access to a range of in-house structured learning activities. Most of the structured training sessions had direct applicability to job tasks, whereas the supervisor training provided learning in anticipation of future job responsibilities. Participation in structured learning opportunities depended on factors such as availability of time, staffing capacity, and urgency. Most participants indicated that they were interested in training that had direct application to the job.

Some formal professional development opportunities for staff are offered by a third party or supplier vendor. Beth indicated how she learned new skills outside of the institution's training programs: "My supervisor did send me to a conference this year, which helped a lot because we have grants from national organization and they all have different requirements." Beth also took part in campus-based programs, such as a semester long academic class on leadership that she enrolled in at one of the academic units on campus. Learning about leadership helped Beth grow in her management skills and capabilities. She went on to say:

The leadership class I think is helping me supervise my part-time person. I think it's also giving me help as far as, like, how to deal with like different leadership styles, if that

makes sense. And the other class on international students I would say that helps with work because we do have a lot of international graduate students and it's giving me some perspectives that I might not have thought of on my own. I think has given me a really good perspective on to be a little bit more, not, I would say mindful of students coming into this country.

While the participants noted that many of the university sponsored training were helpful, there were some responses about the limitations of the training or instances where participants did not find certain components of the training to be helpful. For example, Julia stated that:

Like the training was okay, like the Qlik one that they had was actually from the company itself. And that wasn't entirely useful because it was telling you like what all Qlik can do. Like you can make these fancy graphs and you can do this whole storytelling thing. But like for like what my job was and like even what my job is currently, I didn't need to know that like that is like, that was just something that is just like completely useless to me.

When the training was not immediately applicable, some of the participants felt it less useful.

In some cases, the training sponsored by the university did not apply to several tasks the participants were required to perform by their department. For example, Morgan described it this way:

I would say that sometimes what you're coming up against is situational decision making in our role, where the training you receive is, it's not context based. So, you're having to, to find ways to complete certain aspects of your job because there has, there was no training in context on that particular thing you needed to know how to do. The training was too broad.

Structured learning opportunities were viewed as less helpful when they did not have immediate application. In Morgan's case the training was limited when the presenter did not provide her with specific knowledge of the scenarios or problems she was facing. In other instances, the trainer did not have enough information to be able to guide the participants in the right direction. This lack of utility can happen because there are unique processes for each academic unit.

Morgan explained that:

For example, the academic scheduling training happens in very small groups and the person doing that training is very familiar with the individual departments situations because she interacts with us, she actually does the work with the departments throughout the process. And so, when I got training from her, she was able to say, well, in this department you will run into this, you won't run into that. And then she could focus on what would actually come up. There are going be situations for them that come up that never come up for me and there are going be situations for me that don't come up for them. So, it's, it's a difficult thing to expect the trainer to know each unit's process. But I think it would be incredibly valuable if they all could.

Moreover, in some cases, whether the individual has prior experience in higher education or not, university training that is offered about university-related systems and processes, needs to also include a section on the terms used for different processes or systems.

Morgan voiced her concerns about when a lack of situation context is ignored. She shared:

When I was first started attending these trainings like onboarding, I didn't have even the vocabulary to understand how would this map onto to my work, how would this map onto my department's you know, like so it's, it's a really tough nut to crack if you will



because everyone is in such a different seat even though we're all ostensibly doing the same job.

Structured and formal training opportunities provided a way for participants to learn how to do certain job functions yet were often limited because no one training experience can cover the nuances of every administrative job on campus. In many cases, the participant was left reaching out to individuals in their informal network, if they had one, to fill any remaining knowledge gaps to help them do the task.

Structured learning contributed to how the participants felt more confident in their new roles. According to the data analyzed, moving from novice to more prepared and confident in their ability to do the job occurred after the participant was in the role for approximately one year. For example, Kevin has been in his job almost a year, and said he's found a routine to his daily work schedule. And although he is still learning how to do certain tasks required for his job, he feels very prepared to do the job now, compared to when he first started in the role. He said there are some things, such as learning how to process international travel for faculty that he's still learning but seems very confident in his ability to do the job successfully. Similarly, Julia also mentioned that she too feels confident in her ability to do the job. She has been at her job for nearly one year, and attributes this to having developed a calendar that tracks the sequence of events as they occur annually. She also said that she now has a network of administrators she can turn to if she has questions, which includes her strong relationship with her predecessor in the role. Consider Donna who has been in her position for one and a half years. She indicated that while there are still things, she's learning to be successful in her position, she has learned the basic skills that are required for the majority of the work she does. Donna was part of a team that provided faculty support to the department with no fiscal

responsibilities. She indicated that the first year was the hardest but felt more confident as the months progressed.

### ***Facilitators of Learning: Learning Through Collaboration***

Different from learning through discovery, facilitators of learning for this study demonstrated two approaches. One element that facilitated participants' learning included technology tools and resources. A second element was individuals at the university who helped facilitate the participants' learning through the expertise of another more experienced employee. Collaboration such as individual discussions or communication with colleagues at the university with similar job duties, often aided the participants' ability to complete a task.

Collaboration and learning from others within an informal network provided the primary facilitators of learning and was used by 8 out of the 10 participants. In some cases, participants stated they had a network of individuals that they often turned to on a regular basis to ask questions about how to do different tasks. Participants with approximately one year in their position had loosely to tightly formed informal networks they could turn to for help completing tasks. Conversely, those with less than a year shared that they were still learning many aspects of their job and did not yet have informal networks they could turn to for assistance.

Morgan has been in her role for three years and has had the opportunity to assist other administrators at the university. She said, "I do feel like there are networks of groups that frequently work with each other to help them when they get stuck." Donna has not been in her role long yet was able to similarly reference a network of administrative assistants that she turns to if she has questions about a specific task. For Donna, this network is an informal group of administrative assistants that work in her department. For other participants, informal networks were typically small with only two to three people. Developing a network can be difficult in the

early stages of the job, such new hires. However, identifying the right people and getting their permission for you to reach out to them on a regular basis was a key point that one of the participants made. Additionally, because many informal networks are relationship based, it can be difficult especially for new hires because they have not yet developed the relationship to form informal networks.

The second primary facilitator of learning included pre-established mechanisms that were available for participants that aided in learning how to do their job. These facilitation tools included procedural/operational manuals, online resources, internal documents, vendor documents or a contact group. For example, how-to guides created by a department, or a department microsite, or a network of individuals with expertise in a particular area, could be characterized as facilitators of learning. However, there were some limitations to certain of these types of resources that were not as helpful to some participants. Nonetheless, these tools were helpful as a first start. Autumn provided this example:

For me, access to detailed information and instructions about how to, you know, perform specific tasks or, you know, duties, was important to me. Also, I'm at a satellite campus you know. So, university processes that work in one department might not work the same, and then there are others that are different or modified or altered for, you know, and then ours are modified specifically for our purposes. So again, you know, going back to detailed written accessible information that directly speaks to, you know, how and when to perform, you know, specific tasks that for me is the, the biggest. And it was something that I agonized over you know, quite a bit when I came on board.

She added:

For me the, the picture that I had in my head when I came on board, it's just, it's being able to access a, a manual, or a website an internal website with intranet that would have the information I needed to perform a task.

Conversely, some participants shared that their departments had internal documents or operations manuals as reference guides that are updated on a regular basis. In these scenarios, documents are used as a point of reference for seeing how items have been processed or created in the past.

These resources were very helpful for Donna when she first started in her role as an administrative assistant. She recalled, “there is a training manual that I can go to. So that helps.”

Donna continued:

So, my first thing, when I get something like this project, I go to the files that were done previously and I just look at them and see how they were all done. And then if I have questions, then I'll go to my coworker. But for the most part, if you look at what's been done previously, you can basically pick it up, and duplicate it.

Additionally, having a department microsite or using the university's web site was frequently a starting point for some. Beth frequently used this as her go-to option and explained, “I normally would go to our internal website and see if I can find what I need to know as a starting place.”

Although Kevin had prior experience working on similar systems at another institution, he relied heavily on the department's internal operations manual to help guide him with new tasks that had multiple steps. He stated:

Having the digital archive of previous paperwork is another wonderful resource of just, I can go and instead of bothering my boss. I like directions. I, I do okay when IKEA tells me, you know, here's the picture, put this into this. I like instructions because you can

have very, sometimes instructions can clearly communicate how to do something, but for the most part, and they, sometimes they can be vague, so like pictures and instructional learning is great, but there are times my boss trains me and she'll be like, "cool, I'm going share my screen." Watching someone do it and reading the instructions on how to do it are very important to me.

Pre-established mechanisms that participants used to help make learning their jobs easier were not as common as collaborating with colleagues, but also facilitated learning among the participants.

**Table 3**

*Summary of Themes*

Primary Learning Themes	Factors
1. Learning through Discovery	<ul style="list-style-type: none"> <li>• Indirect guidance: learning through interacting</li> <li>• Independent learning</li> <li>• Departmental guidance</li> <li>• Trial and error</li> </ul>
2. Learning from Prior Knowledge	<ul style="list-style-type: none"> <li>• Prior work experience in a university setting, non-university setting with administrative experience</li> <li>• No prior knowledge</li> </ul>
3. Learning through Training and Development	<ul style="list-style-type: none"> <li>• Formal learning</li> <li>• Informal learning</li> <li>• Professional development</li> </ul>
4. Facilitators of Learning: Learning through Collaboration	<ul style="list-style-type: none"> <li>• Informal networks</li> <li>• Interacting through technology</li> </ul>

*Note.* This table illustrates the primary learning themes and corresponding factors most frequently identified and/or used to facilitate the learning based on this study.

**Summary**

The essence of the experiences of participants in this study highlighted how prepared they felt when starting their job, what type of knowledge sharing (formal or informal) mechanisms were in place to facilitate this sharing, and what supported the development of their learning. Participants felt prepared to do their new jobs based on prior experience working in prior administrative roles, which made the new work familiar to them. Even participants with no higher education experience were able to use basic administrative skills knowledge, albeit in a different industry. They used formal training programs and learning from peers to support what they needed to do in their new roles. The components that contributed to their development of staff learning included both in-house training in their department and through the university's learning management system and training by vendors of software systems. Additionally, knowledge sharing through collaboration was frequently facilitated by technology tools such as Microsoft Teams or through direct email.

The primary findings of this study showed the key learning processes administrative staff use when learning how to do their jobs. By using the Nevis et al. (1995) organizational learning theory and workplace learning framework of Tynjälä (2008) as a priori codes for deductive coding of the interviews, I was able to examine the processes that staff use to learn and acquire the knowledge they needed to learn how to do their jobs. Of the learning processes used most, this research found that most participants preferred learning by discovery. This process included first figuring out how to do the job itself. For most of the participants the first steps in this learning process involved organizing the work and prioritizing what needed to be done and what a daily routine might include. Then, making assessments about who and what resources they had access to, if they had questions was generally involved. From this stage of learning by discovery, participants used resources such as a web site, YouTube, trial and error, or indirect guidance by

reaching out to a colleague in the same or similar office, or peripheral learning by watching another person show them how to do something if they needed to learn.

In this study, trial and error processes are described as tackling a task at multiple stages of learning. For some, this meant attempting the task to the point of frustration, and then asking for help from someone. While others reached out for help early in their trial-and-error process. The participants also learned informally by accessing manuals or asking others specific questions or by taking part in structured learning programs, which were used to varying degrees depending on the participants preference for learning. Of the seven workplace learning processes from the Tynjälä (2008) framework, only one participant used learning through extra-work contexts. Recall, extra-work contexts are defined as working on a university wide committee or project. Autumn was the only person in the study that identified this as a learning process that she experienced. And last, all participants shared that they enjoyed the work they do and the environment in which they do it. It is possible that by liking their job, they were motivated to learn and identify processes that would help them perform in the role, compared perhaps to someone that did not like their job.

What emerged from the data analysis was the relationship between the organizational learning processes used and the individual learning preference of the participant. One of the most interesting observations from this study came from Pippa, a participant who had no experience working in a higher education setting. When asked if there was anything more, she wanted me to know about how she learned to perform her job requirements, she stated:

Yes. There is something. I'm thinking about how to like match a teaching style to people's learning styles and how to possibly do so in a group of diverse learning styles. Is there some sort of overarching like, teaching style that can work best for everyone in a new

job? Or is it just whoever, or whatever kind of learning style is, is the most prominent. I think supervisors should ask new employees how they like to learn before they begin a new job. This would have helped me a lot.

Aligning programming and support to onboard new employees could be structured by asking new employees how they like to learn. Short of doing this direct ask, supervisors could provide a range of training options to new employees to allow individuals multiple approaches. Job postings typically outline specific job experience requirements. However, assessing early on, such as during the onboarding process, how prior experience can serve as a baseline for what needs to be learned could be useful.

In Chapter 6 of this research study, I will discuss the findings based on prior literature and the theoretical frameworks used in this study. I will make recommendations for how this research can be used to improve current processes for onboarding new staff. Additionally, I will further discuss trends in specific facilitators of learning that align with the themes and could provide additional insights for best practices for professions such as HR and organizational learning and development practitioners.



## **CHAPTER 6**

### **DISCUSSION AND RECOMMENDATIONS**

Organizational learning is conceptualized among many scholars as a learning process that leads to the development of new knowledge or insights within an organization (Huber, 1991; Nevis et al., 1995; Senge, 1990, 2006). As a knowledge building tool, universities and colleges can benefit from its ability to strengthen organizational capabilities across multiple levels of the enterprise. This study examined how 10 administrative staff in a mid-sized public university setting learned how to do their jobs in the first three years of employment. In Chapter 5, I reported the results that emerged from the study through the methodology of phenomenology and the methods of thematic analysis. Central to the theory of phenomenology is the ability to describe the participant's lived experiences with the phenomenon, which in this study centered on how staff learned to do their job (Creswell, 2014; Moustakas, 1994). This method of inquiry helped me understand more deeply the perceptions of each participant's work role experience as they constructed it when new on the job. In this section I connect discussion points, key insights for practice, and how each of the findings aligns with the theoretical framework for the study, and recommendations for practitioners in the HR and organizational learning and management fields.

The essence of how new staff learn how to do their new jobs as gleaned from the participants highlights occurs primarily through learning through discovery and learning through collaboration. The primary learning processes that drove these methods included trial and error, indirect learning and just doing the job.

## Summary of the Findings

This study used two theoretical approaches to organizational learning. The first was organizational learning theory, which posits that the process of organizational learning occurs in three stages: (a) knowledge acquisition, (b) knowledge sharing, and (c) knowledge utilization (Nevis et al., 1995). The second was a framework that focuses on the mechanics of organizational learning framework and includes seven learning processes for how learning occurs at work. These processes include:

- doing the job itself;
- through co-operating and interacting with colleagues;
- through working with clients;
- by tackling challenging and new tasks;
- by reflecting on and evaluating one's work experiences;
- through formal education;
- through extra-work context. (Tynjälä, 2008)

After completing thematic analysis of the data collected for the study, the primary findings for this study showed that the participant's primary methods for learning how to do their job took were: (a) learning through discovery, (b) learning from prior knowledge, (c) training and development, and (d) facilitators of learning, such as learning through collaboration. The ways in which the participants learned new tasks depended on the learning outcome they were trying to achieve. Additionally, analysis of the data further revealed answers to the guiding research questions provided (Table 4).

**Table 4***Guiding Research Questions: The Essence of Approach to Learning*

Guiding Research Questions	Most Frequently Identified Response
What aspect of the job did staff members feel prepared to do when starting their job?	Basic use of MS Suite, general office duties, coordinating calendars
What type of knowledge sharing (formal or informal) mechanism(s) are in place to facilitate knowledge sharing for staff if any?	MS Teams informal networks, and interactions with their supervisor
What informs the development of staff learning?	Training by university departments, university learning management system, and vendor training

*Note.* The following table illustrates the research questions that guided the study and interview protocol and the most frequent response provided by the participant based on these three questions.

MS = Microsoft.

These findings support the Tynjälä (2008) workplace learning framework and the broader Nevis et al. (1995) theory of organizational learning. Participants demonstrated all seven processes/activities in the Tynjälä (2008) workplace learning framework across all four themes to acquire knowledge they needed to do their job. The first process, doing the job itself, was prevalent in nearly all of the participants. This learning was achieved by various processes such as using technology, indirect guidance, or trial and error. Participants also learned through cooperating and interacting with colleagues, especially if they had an informal network with which to draw from. Interacting with work clients was also evident in the findings especially when the knowledge was specialized or unique to a particular software system or process. Here,

work clients were vendors, other departments, or board members. Tackling challenging and new tasks was also evident, but not as much for newer participants in their job. This approach was more common for participants who had slightly more experience and were taking on more work responsibilities. Reflecting on and evaluating one's work experiences was demonstrated both by those with higher education experience and those without it. It was also used by those who had fewer years of experience in their role and by those who had more years in their role. There were several participants who had participated in some sort of formal education opportunity in varying degrees. For some it was professional development, for others it was taking an academic class at the university. Only one individual demonstrated learning through extra-work contexts, which was a university committee that had nothing to do with her job. It did, however, give this participant the opportunity to meet other people at the university, thereby strengthening her informal network of administrators.

Using the Nevis et al. (1995) theoretical construct, the analysis found that participants acquired knowledge through multiple means using the workplace learning processes (Tynjälä, 2008) such as trial and error, indirect guidance, and cooperation and collaboration. Knowledge was shared with participants from cross-department units through formal and informal institutional structures and by someone who provided indirect guidance. It was also shared through training via technology or in person. And finally, knowledge utilization was actualized through repetition of tasks learned, through indirect guidance by colleagues, or self-directed methods to retain what was learned for task completion and improved performance.

### **Discussion of the Findings**

The findings of this study aligned with the theoretical underpinnings of organizational learning found in the frameworks used for this study, which provided meaningful insights

relative to the literature on organizational learning. To discuss the findings, I will use quotes directly from the participants to remain consistent with the phenomenological trustworthiness of the research study. Further, I outline the discussion using the findings from this research study.

### ***Learning Through Discovery***

As Nevis et al. (1995) argued, knowledge acquisition is fundamental to the organizational learning construct. Learning through discovery findings captured the widest and most commonly used methods of learning how to do their job. It included processes such as learning through trial and error, indirect guidance, and self-directed learning through the university's learning management system Cornerstone, YouTube, or from the Internet. When participants described the process of learning how to do their job, they provided examples of tasks they were required to complete. The first step new employees used when faced with completing a new job task was to reflect on the complexity of the task and then to assess whether it was intuitive enough to figure out on their own. If so, they would tackle it by using resources that were easily accessible and available to them through one or more of the aforementioned learning processes (i.e., trial and error, indirect guidance, self-directed learning through the university's learning management system Cornerstone, YouTube, or the Internet). When the solution to figuring out how to do the new task was not intuitive, the new employee chose a self-directed path to learning based on their preferred mechanism or learning style. Table 5 shows the Tynjälä, (2008) workplace learning framework and corresponding activities that emerged from this study.

**Table 5***Study Findings, Workplace Learning Processes and Activities/Methods*

<b>Learning Process</b>	<b>Participant's Activities/Method</b>
1. Learning by doing the job itself	Through YouTube, Website, MS Teams, email Reaching out to a colleague, asking a co-worker, internal operations manual
2. Learning through co-operating and interacting with colleagues	Reaching out to a colleague, asking a co-worker; Informal networks resulting from interactions with colleagues at orientation, onboarding, and other formal training
3. Learning through working with clients	Department offered training (the grants dept., Chrome River training, Cornerstone, procurement dept.)
4. Learning by tackling challenging and new tasks	Figuring out how to process and invoice, procure equipment, pay travel, hire a graduate student, set up faculty interviews, manage budget, send a parcel
5. Learning by reflecting on and evaluating one's work experiences	Prior higher education, prior real estate, prior hospitality, prior administrative assistant
6. Learning through formal education	Professional development, university system software (Chrome River), university LMS (Cornerstone), academic coursework, industry- related conference
7. Through extra-work contexts	University committee

*Note.* This table illustrates the workplace learning framework (Tynjälä, 2008) and the most frequently provided activities and/or methods based on responses from the participants during the interview process.

Dept. = department; LMS = learning management system

The results of this study also highlighted the presence of different approaches to decision making regarding approaches to learning how to do a new job. Two types of decision making occurred, rational choice and bounded rationality. In rational choice decision making, one considers how best to maximize the outcome of the decision carefully weighing all options (Eisenhardt & Zbaracki, 1992; Simon, 1991). In bounded rationality, maximizing the best outcome is less important, and instead making the decision quickly is the goal (Eisenhardt & Zbaracki, 1992; Simon, 1991). A third type of decision making, *satisficing*, occurs by coming to a decision that an individual determines is good enough (Simon, 1991). However, satisficing was not displayed by any of the participants. The use of decision-making theory and understanding how someone makes decisions is an important component of learning how to do a new job. Many scholars of organizational learning focus on the typologies of learning such as experiential, generative, adaptive and assimilation; however, few integrate decision making as a factor of learning for knowledge acquisition. Decision making was also not examined as an element in adult learning literature (Knowles, 1984). Senge's (2006) team learning, and personal mastery does address learning at the individual level yet fails to outline how decision making is factored into the learning process.

The decision-making component of organizational learning in this study was most evident at the individual level where self-directed, and trial and error methods were deployed. Its relevance to the learning process is demonstrated throughout the findings from participants who used various learning discovery methods. For example, in her learning through discovery method, Beth gave examples of the bounded rational choice approach to how she makes decisions when she needs to learn something for her job. She first looks at the task assigned, then determines how to complete it based on what she knows and then she decides. Recall how Beth

has prior experience in higher education and has been in her current position for three years. Compare this to Eugenia who has only been in her role six months and indicated that she immediately weighs each option carefully, which includes reaching out to a colleague in her department, and to other administrators with similar roles. Eugenia did not come to the position with knowledge about working in higher education or about the discipline of the department in which she works. Her learning through discovery decision making is measured against the risk of getting it wrong, especially when she is working with constituents such as board members that require a high level of attention to detail. In these situations, Eugenia operates from the rational decision-making approach, weighing all the options carefully before she decides. Knowing the range of decision-making options that new staff employ can bolster the type of training, development, and onboarding the institution offers.

In most cases throughout this study, learning through discovery was the conduit for all other learning processes that are directly related with learning how to do their jobs, unless it was mandated by the university or self-selected, such as the leadership class in which Beth enrolled. Otherwise, most participants stepped into their role asking basic questions or receiving sparse directions as a starting point for where and how to begin. As a result, learning through discovery encompassed several methods used to get the knowledge they needed.

### ***Learning From Prior Knowledge***

Reflecting on and evaluating one's work experiences is one of seven learning processes of the Tynjälä (2008) conceptual framework for this study and was one of the four findings for this study. The codes associated with learning from prior knowledge focused on knowledge obtained in a previous workplace setting. Both Knowles's (1984) adult learning theory and Kolb's (1984) experiential learning theory underscore this facet of learning, particularly in the



workplace. Both theorists posit that previous and current work experience can contribute and inform the way employees learn how to do their jobs. Facets of both theories were demonstrated by participants when learning by trial and error, where participants used their prior knowledge base to inform how to tackle a new task. Supervisors who are responsible for onboarding and/or training new hires can leverage this knowledge base by gaining a clearer understand of an individual's background prior to starting a new position. Several factors such as prior work in higher education, the length of time worked, prior experience in the function of administrative assistant, and even one's general familiarity with the college experience, all can influence the base of knowledge from which an individual draws their experience and understanding in their efforts to learn.

Several participants had experience working in higher education while others did not. However, those who did not still drew from their prior work experience, albeit indirectly. For instance, Pippa spoke about her years as an administrative assistant in a real estate organization and how that helped her quickly form a basic understanding of what her new role entailed. Eugenia previously worked in the hospitality industry and said it gave her a good understanding of the customer service component of her job, which involves working with board members and members of the community that they serve. Neither Pippa nor Eugenia has bachelor's degrees and were not familiar with the college environment prior to accepting their jobs. Nonetheless, they both were able to use some aspects of their non-higher education experience to inform the way they thought about doing their jobs.

It is worth noting that job descriptions for both Pippa and Eugenia's positions indicated that preferred qualifications include prior experience working in a higher education setting. However, when speaking with participants who had previous experience in a higher education

setting, there were still several aspects of the job that they spent several months learning how to do. Having prior work within a higher education setting did not provide an advantage to those participants with this previous experience. For example, even though Kevin worked at another university and indicated that he felt very prepared to do the job, he still found there were several processes his department uses with which he was not familiar. Moreover, Beth also had higher education work experience and stated that she was surprised at the amount of procurement system and scheduling system training that was required for her to become proficient.

The type of prior experience that participants most often commented on was helpful, but not critical, was experience in a higher education setting. While previous work experience in higher education provided some guidance there was still much to learn as a new administrative assistant. Based on the responses from several participants what needed to be learned seemed to give participants with prior experience in a higher education setting only a slightly better lead than those without it.

### ***Training and Development***

Participants indicated they learned how to do their new jobs through training and development. In this study, formal and informal learning included orientation, onboarding, classroom coursework, and professional development all provided the participants with opportunities to learn. The Tynjälä (2008) workplace learning framework states that formal education is one of the learning processes by which individuals learn in the workplace. For this study, formal education was defined as instances of formal training, learning through structured on-the-job sessions with others, and sessions hosted by HR on how to fulfill job requirements. Orientation and onboarding were also examined as part of the formal education learning process. Keeping in mind that for this study orientation was defined as a more formal process offered by

the university, while onboarding was seen as an informal job transition conducted by one or more individuals in a department.

**Orientation and Onboarding.** Starting a new job can be an exciting opportunity. New employees have the satisfaction of knowing that they have successfully met the employer's criteria for the job posting and surpassed other candidates who competed for the same position. It is quite satisfying to get a call or email from the employer offering you the job. After receiving a job offer, new hires are ready to begin and attend their first day of orientation. Several participants articulated a similar path to starting their new job and commented that they attended an orientation that was sponsored by the university's HR department. Most participants in the study found orientation information to be helpful and useful as it applied to their standing at the university but lamented that they wished it helped them connect to the larger university mission. In Beth's interview, she indicated the following: "I attended orientation that the college provided through HR, it was good. But I do wish they would tell us how what we do fits into the broader business of the university." Here, Nevis et al.'s (1995) stage of knowledge acquisition is demonstrated through the information they receive at orientation. However, this example, albeit knowledge that is acquired, underscores the significance of Knowles' (1984) andragogical assumption that what is being learned is relevant to their current roles.

As such, two key aspects of the adult learning theory as described earlier, should be considered when delivering orientation and onboarding programs. One, integrating the 'why' of the orientation and onboarding. This inclusion will help staff understand the big picture of how what they do, affects the university's goals and objective. And two, keeping in mind that newly hired staff have a pre-existing knowledge base they will draw from, which includes their own

experiences as a resource for learning. These two components could help orientations and onboarding be more effective.

Of note, department onboarding rarely occurred for participants in this study. Kevin was the only participant who received designated and structured onboarding within his department that occurred over several days. Many participants indicated that their role transition experience was piecemealed together and inconsistent. As a result, they felt uncertain about what was expected of them in their new roles. This knowledge gap resulting from the lack of a comprehensive and structured onboarding process into their new position was consequently the impetus for several of the learning processes to include, trial-and-error learning, indirect guidance from a colleague, searching the Internet or the university's web site – all of which were methods deployed by participants in the learning by discovery finding. In both cases of orientation and onboarding, the knowledge acquisition factor (Nevis et al., 1995), albeit in varying degrees, was demonstrated.

As mentioned, Knowles (1984) emphasized in his adult learning theory, the importance of adult learners' desire to know why they need to know or learn something and more importantly how it will be applied to their situation, or in this case, their job. As evident in Beth's quote above, the "why" of her work was missing as she did not understand how her work connected to the overarching goals of the university. The experience of these participants highlighted how the HR orientation current in place was missing information to help new employees understand how the university works, what its primary revenue streams are, and how their administrative role contributes to the university's long-term goals and objectives. Eugenia echoed Beth's point about wanting to better understand how her job connected to the broader mission of the university. She stated, "I feel very removed from the real part of the university

because my job is at a satellite campus, and because it's not a high-level role." Kevin felt similarly, and added, "So just understanding how we get people to give us money from grants and the revenue aspect of my department would be good to know—at a high level." The connection to Knowles (1984) adult learning theory is even more evident here. One of his six characteristics of adult learning requires facilitators of learning to explain why they are learning what they are learning and tie it to the bigger organizational mission. This connection to how their job function fits into the broader university mission was important to several administrative staff who participated in this study.

At the department level, Savannah stated that she would like to see the outcome side of what she does. She processes a lot of travel and conference registrations and would like to know what the conferences are all about and how her job helps the broader community of educators. What stood out was the fact that both orientation and onboarding do not appear to consider transition processes from the perspective of the new employee. Both orientation and onboarding were in-part, approached from the perspective of the university and not the individual employee vantagepoint (Knowles, 1984). This is a missed opportunity and could therefore impede an employee from engaging fully in the job and understanding what is expected of them.

Adult learning theory is based on assumptions of adult learners and environments where adults work. Organizations that want to leverage concepts of Senge (2006), Argyris and Schön (1978), and Kolb (1984) in the workplace environment should begin first to understand key characteristics of adult learning to maximize the strengths of these organizational learning constructs. Specifically, there needs to be a focus on helping connect the individual to the "why" of the objective. In many of the interviews throughout this study, there appeared to be a disconnect between both the "why" resulting in the lack of an adult learning approach to

learning. Whether the approach involves formal or informal onboarding or orientation, both require an adult learning centered approach. This lack of understanding can impede what Senge (1990) calls, the personal mastery level, which encourages individuals to share what they've learned with others to help the group build knowledge that benefits the entire organization.

**Indirect Guidance and Sharing Expertise.** The lack of an adult learner approach in onboarding new administrative staff at the site university was also evident for participants who relied on indirect guidance from cross-unit departments. For example, simply asking how an employee prefers to learn how to do their job is an example of how adult learning principles could be applied. I was unable to find any evidence from this study that showed participants were asked how they liked to learn their new job tasks, though this question would have been welcome by participants as noted by Eugenia, "I think supervisors should ask new employees how they like to learn before they begin a new job." Situating orientation, onboarding, and other transition efforts as adult learner centered is important if the goal is for the employee to learn and be a top performer in the role. Deploying this approach to learning based on components of the adult learning framework, how to do the job could introduce trust and confidence between supervisor and employee. For the broader organizational mission and learning opportunity, it could aid in creating a climate where new employees understand how their role fits into the university's mission at the micro and macro levels of the organization.

**Lack of Training and Professional Development.** The findings in this study indicate that the participants lacked a standardized and sustainable training mechanism. While some received training that took place informally facilitated by colleagues and some by department-sponsored training, the training was often inconsistent depending on who was delivering the training. Training and professional development were examined in this study as part of the

workplace learning framework Tynjälä (2008). A recurring comment across all interviews was the lack of training and professional development that was available for people in administrative staff roles. Two participants spoke about formal training for administrators that was provided by the university prior to the COVID-19 pandemic and noted that this training has not been reinstated. Beth has been in her role for three years and has helped other administrators learn how to do their jobs by providing informal training sessions in one-on-one sessions. Savannah stated that she could have benefited from formal training for her job. She stated that her confidence in her ability to do the job came from her prior experience in a similar administrative role at another department several years prior. But she emphasized that she received no training for her current role. Donna concurred with the lack of training, and said, “We are expected to learn a lot on our own, so that’s what I have to do, because there’s no training.” As noted, the participants primarily learned how to do their new jobs by individual discovery versus formal training programs.

Participants who did receive training said it was not always applicable across departments. Based on responses from participant interviews, there evidently was some training for administrative roles before the COVID-19 pandemic. Two participants who received formal training in this study indicated that the training did not cover all aspects of their job duties. Morgan, who has been in her role for 3 years shared that the formal training she received was lacking in scope. She said:

They do kind of training, but you know, when you're sitting in a room with the stuff on the screen, it's really hard to follow. Also, they didn't provide training to the level for my department. There are times when my department does things differently.

Morgan also said that the formal training was provided by a person that was not familiar enough with all of the nuances between departments when it came to different department and program requirements. Other participants in this study shared that they often reached out to other department administrators for informal training. Sometimes this occurred by various methods such as screen sharing to walk an individual through the steps to more precisely to show instructions for completing a task. Yet even this informal opportunity, while helpful, was not always available. Most participants agreed that there was training for learning how to use university-based systems, such as Chrome River and the procurement software. However, the training was only delivered if someone in that business unit was available to do the training. Julia said, “the budget office will put out an announcement about when they are offering training. But that training is not on a schedule.” The lack of consistent opportunity to access training presented a challenge for the participants as they worked to learn how to do their new jobs. These participants stated their desire for training that was more meaningful to the types of tasks they were required to carry out on a regular basis.

Certainly, some training did exist. For example, Beth mentioned that she attended training on how to manage grants as a professional development opportunity. And Pippa said she has taken two training classes on how to use the university-based procurement system. The lack of training for some and consistent training for others came through. Beth stated:

You know, most of us are managing like million dollars in grants, other monies, and I don't know, it's kind of crazy that there isn't standardized training for those of us in these roles. And there's a lot of us. At my previous university they were training heavy. And it took me almost a month of online training and in classroom training to have access to banner. Here you basically request it and you've got it. There's no training.”



Additionally, Julia stated that she participated in training sessions that were provided by the software company representative, but that many of the features the presenter discussed did not apply to how her department would be using the software. Morgan added the need for:

Due diligence in training people because the potential for like fraud or doing something that you're not even realizing you're doing wrong is huge. And if you want to go to professional development outside of campus, good luck. Because there's no money to do any of it.

Training can contribute to an employee's confidence and preparedness to do the job. Participants in this study emphasized the importance of formal training, but more importantly, training that was meaningful to their roles and helped them connect what they do to the larger mission of the university.

All participants said they enjoyed the work they do and get satisfaction from doing the job the right way but wished that there was a standardized training program just for administrators. The learning organization construct is one in which the knowledge building routines for the workforce is intentional. A learning organization framework developed by the Organization for Economic Cooperation and Development (2018) states that universities that aspire to be learning organizations must have these seven characteristics: (a) shared vision focuses on learning by all students; (b) continuous professional learning by staff; (c) team learning and collaboration among all staff; (d) culture of inquiry, exploration and innovation, (e) systems for collecting and exchanging knowledge and learning, (f) learning with and from the external environment, and (g) modeling and growing learning leadership. This model, albeit a learning organization framework and not an organizational learning framework, is designed for universities. However, there are similarities to the Tynjälä (2008) workplace learning framework

used in this study. The concept incorporates tactical components that universities can implement to promote and support training and professional development for staff. As such, job training should be an intentional part of onboarding and transitioning into new roles.

This framework points to gaps in organizational learning at the site university studied for this research. Each of the components of the Organization for Economic Cooperation and Development (2018) are examined here to further identify learning gaps outlined by participants in this study. First, none of the participants mentioned student learning at all, and in fact, pointed out that they saw a lack of connection with their work and the mission-driven goals of the university. Second, the lack of professional development for staff meant fewer opportunities for the new employees to learn. In fact, there was little opportunity for professional development outside the university. Professional development that was offered, was generally conducted online through the university's learning management system. Third, even though participants noted how they learned informally from others, there was no intentional framework or process in place to nurture collaboration among all staff. This type of collaboration developed organically in most cases and was not intentional. Fourth, it was not apparent from the interviews that there was a culture of inquiry present. There was a genuine desire to learn among the staff, however, it did not reach the level of ongoing curiosity that might drive innovation. The university does have an innovation center, thus signaling value for exploration; however, none of the participants noted a value on innovation in their own work. Rather, most work-related tasks were very functional such as processing travel and budget information. Fifth, no formal systems or mechanisms were in place to collect or share knowledge beyond. Participants in the study spoke about an attempt to develop a formal group of administrators on campus for such a purpose, but it has not yet come to fruition. Sixth, the lack of a deep network on campus among

administrative staff precluded knowing more about other units outside of the administrative staff member's work area. Finally, there were no opportunities for the staff to learn about leadership. One participant spoke specifically about her interest in gaining leadership knowledge through a course she is taking at the university.

Other frameworks of a similar type include the standards for professional learning developed by the Learning Forward (n.d.) organization. This framework outlines three components necessary for high-quality leading, teaching, and learning for students and educators. The three components of the framework include: (a) rigorous content for each learners, which describes content of adult learning that can lead to improved student outcomes, (b) standards within the transformational process, which describe professional learning processes that explain how educators learn in ways that sustain significant changes in their knowledge, skills, practices and mindsets, and (c) standards within the conditions for success component, which describe aspects of the professional learning context, structures, and cultures that support high-quality professional learning (Learning Forward, n.d.). In my study, the participants did not note a link between leadership goals and the jobs of staff, and instead commented on their lack of understanding of how their work fits the institutional mission and goals. There were scant development opportunities for the staff in this study and no documented process by which their work outcomes contributed to the learning of others. The larger strategic plan of the university shows measurable outcomes, yet these are not linked specifically to staff roles. Finally, even though the university is a place of learning, limited professional development opportunities existed for staff. The guidelines of the Learning Forward (n.d.) framework are not currently in application at the site university.

Of particular interest to the tenants of organizational learning are the transformational process component and the conditions for success component. The transformational process component emphasizes how learning occurs that leads to transformational changes in an educator's knowledge, skills, practices and even mindsets (Learning Forward, n.d.). The conditions for success component points to elements favorable for learning that includes a culture of collaborative inquiry and resources. The Learning Forward (n.d.) framework has similar elements of the Tynjälä (2008) workplace learning framework used in this study, in that they both highlight the importance of learning processes to advance learning among educators.

### ***Facilitators of Learning: Learning Through Collaboration***

The findings in this study indicate that learning through collaboration took place through social interactions between two people or in small groups. Within adult learning, this type of knowledge sharing and skill building approach (Stein, 1998) is offered in context of how it will apply to the individual's specific job duties, thereby drawing a deeper understanding of how processes connect. Codes used to identify learning through collaboration included processes such as indirect guidance, administrator groups, peripheral guidance, informal networks, or structured teams. In addition to these, specific facilitators of learning such as operation manuals or technology such as Microsoft Teams, were commonly used to facilitate learning through collaboration. For instance, Kevin spoke about his supervisor walking him through specific steps by sharing her screen with him through peripheral learning, as he followed along in the operations manual. Similarly, Julia stated that her predecessor spent an hour with her walking her through office documents and giving her information on who to call in other departments if she gets stuck.

The use of informal networks and indirect guidance were used most to facilitate learning across three of the findings for this study – through collaboration, learning through discovery, and training and development. Senge's (2006) concept of personal mastery highlights how individual learning when shared with others adds knowledge to the organization. Learning through collaboration and in social settings within the organization builds work communities that foster an environment for increased learning potential (Tynjälä & Nikkanen, 2009). Cooperating and interacting with colleagues is a valuable aspect of learning how to do your job. This learning process also allows for co-creation of knowledge between administrator and supervisor. However, several participants described experiences where collaborating or cooperating was very difficult and at times discouraging. Eugenia shared that when she needs to learn how to do something for her job, she prefers to communicate directly with the individuals who are in charge of the unit with which she is interacting. She said:

I think that I learn my job through the way my job interacts with other people's jobs more than I do through people who do what I do. Like with the department. When I need to learn something in procurement, I reach out to them. I've been doing it a lot lately. I feel like sometimes they get annoyed with me.

Going directly to the source of the needed information, in this case procurement, provides an expanded work community to facilitate accomplishing work functions.

Beth's preferred method of learning was through informal training and collaboration. She stated:

I guess I'm pretty good at networking. So, I do have some people I know that work for the science department, so when I have a question, I'll, you know, just message them on Teams. I think my work communities are the best way for me to manage my time

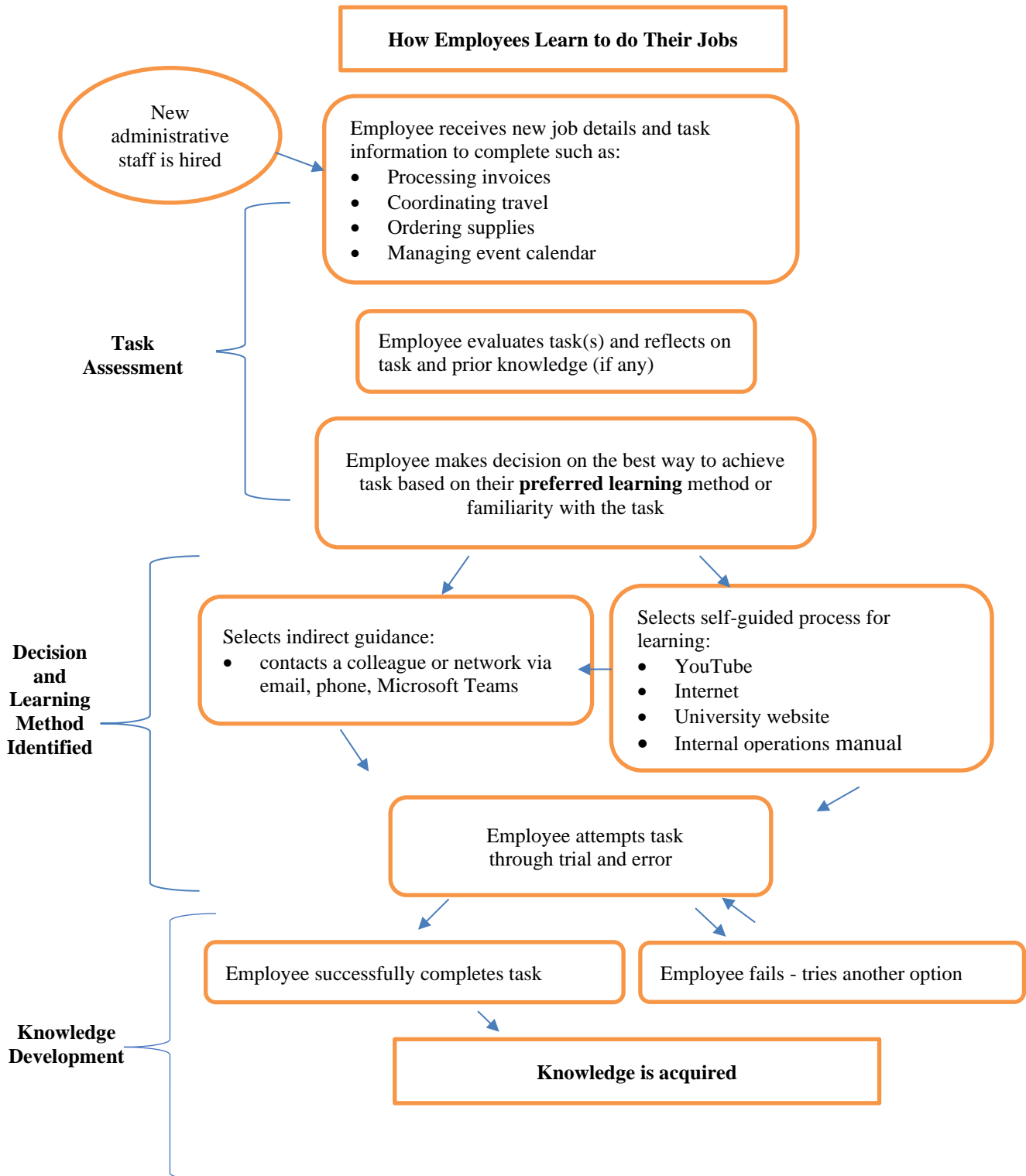
efficiently, because then I can do something else while I'm waiting on an answer, especially if it takes some time.

The informal ways in which participants learn through collaboration were quite common throughout the interviews. The way they sought indirect guidance from a colleague or consulted with individuals in their work communities generally depended on existing relationships. What a person needs to learn often depends on the outcomes they are trying to achieve. If staff are new, it can be very difficult process to navigate the university setting without proper guidance from other more experienced administrators.

Participants in this study used various methods to actualize their knowledge acquisition needs. Figure 3 shows the specific actions/methods participants in this study used when learning how to do their jobs. The endeavor to learn in this fashion is multi-faceted. It was not uncommon for participants to use the same process across various processes in the workplace learning framework nor was the organizational learning construct through knowledge, acquisition, sharing, utilizing (Nevis et al., 1995) a linear process. In each process to learn, decisions were made about the specific path to take. These decisions were typically based on the type(s) of outcome desired by the participant.

**Figure 3**

*Organizational Learning at the Individual Level – Knowledge Building Process Map*



## **Lack of Appreciation**

The literature on organizational learning that was researched for this study did not address psychological needs associated with feelings of appreciation nor its potential impact on individual learning in the workplace. Consistent across the study were a range of expressed feelings of underappreciation. Except for Monica, these feelings of underappreciation manifested in a range of frustration levels among the participants. Similar to onboarding and orientation, organizational learning theorists have not considered individual feelings of belonging and how this dynamic between the individual and the organization can impede a person's ability to learn do their job. Human resource professionals often point to Garvin's (1993) human resource model in which nine key characteristics are outlined for organizations to be effective at the people part of the business. One of the nine elements is a recognition of the role of culture, and its significance in the employee experience. This focus on culture illuminates the interrelationship between individual employees and the whole organization. Further, culture is frequently tied to organizational characteristics of inclusion, belongingness and uniqueness according to Chung et al. (2020). To expand further, management scholars Shore et al. (2011) emphasize that the degree to which a person perceives they belong adds to their perception of being a valued member of the team or more broadly, the organizations. Many participants shared that feeling as though they belonged and that their contributions matter was important. Savannah stated:

I feel like you don't get appreciated that much, you know? You just kind of feel underappreciated. Good old faithful Savannah is there, she'll do it and sometimes you just kind of feel very under underappreciated and sometimes I don't want to be the good old faithful, dependent person.



She went on to say that sometimes all she wants is for her faculty to say thank you. Autumn spoke about her experience learning how to do her job. She said she felt very siloed in her department.

Although belonging was not measured in this study, it emerged as a pattern. Shore et al. (2011) notes the importance of belongingness as an important factor in creating a positive employee experience. Belongingness is described as a human need to feel as though they belong (Shore et al., 2011). This need is based on an individual perception. As such, how an individual perceives their sense of belongingness can have an impact on their motivation and productivity. Additionally, Hackman and Oldham's (1980) job characteristics model connects meaningfulness of the work yielding high motivation.

Individual learning requires several factors working in concert together to acquire knowledge, share knowledge and utilize knowledge to maximize organizational effectiveness. From an employee's point of entry through to their departure, support structures that provide structured and consistent learning is important. So too, is the need for facilitators of learning that take a learner-centered approach to sharing and use knowledge to build their own capacity as well as capacity for the university. Knowles (1984) emphasized that adult learners are motivated to learn. This motivation should be harnessed within organizations. Based on the responses from the participants in this study, job motivation was most certainly demonstrated in how they expressed enjoying their jobs. However, if over time, the cultural characteristics of the organization do not support or advance perceived feelings of belonging, the motivation to learn could erode and result in subpar performance and disengaged staff (Chung et al., 2020). Moreover, Bolman and Deal's (2017) Four Frame model provides insight for understanding organizations and approaches to problem solving through different analytical perspectives. Their

human resource frame approaches organizations from the position of its people. Here, the emphasis is on understanding the unique needs, skills, and relationships necessary to achieve harmony between the talent and the organization (Bolman & Deal, 2017). Through this frame we can observe that staff training and development needs of those in this study are not fully aligned with the training that the organization is currently providing. Ultimately, when individuals in the organization find meaning and satisfaction in their work, the organization can leverage staff to its fullest capacity and benefit from the most effective use of their capabilities and talent (Bolman & Deal, 2017).

### **Implications**

This study's findings have implications for how new hire onboarding practices are developed and delivered, how to create effective training and development programs, and how HR departments can maximize mechanisms for collaboration and cross-functional knowledge sharing. Attention to supporting administrative staff in these areas is important for strengthening organizational capacity to positively affect retention, create a deep sense of belonging between staff and supervisors, and cultivate high functioning and supportive teams. Further, a commitment from university leaders, deans, and human resource administrators will help facilitate organizational learning opportunities from a much more informed position.

According to the rich and detailed description of the participants experiences in this study, many of the elements in the Tynjälä (2008) and Nevis et al. (1995) theoretical frameworks are already in practice. The findings in this study pointed to four primary areas of opportunity, which could serve as a starting point for how administrators can engage staff within academic units and business service areas. Learning at the individual level is supported by Kolb's (1984) experiential learning theory and adult learning theory by Knowles (1984). Both theorists draw

attention to and support the need for organizational learning to be emphasized at the individual level and they underscore the role of importance of learning. Therefore, the implications in this section are provided to draw attention to the opportunity to improve and more closely align facilitators of learning throughout the employee life cycle. First, policy implications are reviewed and then implications for practice.

### ***Policy Implications***

The findings in this study not only highlight the practice and importance of organizational learning and its complementary workplace learning framework, but also implications and suggestions for how multiple aspects of staff learning can be enhanced. Such areas include enhancement at the department and university level through its processes, individual performance, and organizational structures, goals and objectives.

**Aligning With Organizational Mission and Goals.** Organizational learning practices are integral to creating and sustaining competitive advantage in today's higher education marketplace. Within the context of organizational learning at the individual level, training and development are seen as making considerable contributions to institutional effectiveness because employees who know how to do their jobs will do them more effectively (Bolman & Deal, 2017). As such, the opportunity to align learning and development to advance organizational goals can help avoid the possibility of a fragmented learning and development structure. Consistent training and development opportunities for staff that instead are aligned with organizational mission and goals can be systematically linked to all academic units vis a vis the HR department. Moreover, as organizational goals are updated that include upgrades to systems throughout the university, training must be integrated and then measured as critical to its success (Zheng et al., 2010)

**Executive Leadership Support.** According to Holland and Light (1999) and Tseng and McLean (2008) university leadership must be willing to allocate financial and HR necessary to create knowledge building mechanisms among administrative staff. Participants in this study articulated a general feeling that financial resources were not available for professional development such as conferences, or industry association sponsored development. Beth stated that there is rarely money left in the budget for administrative staff after faculty research money has been allocated. Investments at the top level of the university will reinforce a commitment from the institution to ensure continuity across academic units and success.

**Engaging the Frontline Manager and Department of HR.** Department supervisors and managers often have direct sightlines for the pace of knowledge building at the individual level (Tseng & McLean, 2008). This unique line of sight provides an opportunity to immediately identify the learning and development needs of staff, offer performance advice, and direction for additional learning. A commitment to organizational learning practices can inform human resource policy planning and program development by providing a centralized approach to developing program activities to develop employee skills, knowledge, and career planning activities. Additionally, results from annual performance reviews and evaluations can inform managers of specific training and development needs of staff. Moreover, at the macro level, as it applies to university systems such as procurement and travel software, policy that regulates and manages how and when university systems will be procured by the university should also be considered. Administrative staff comprise the highest volume of end-users of these systems and their input nor consultation is not considered, according to participants in this study. As mentioned earlier, integrating experienced administrative assistants to deliver training to newly hired administrative assistants should also be considered. This partnership with the HR

department can build trust and strengthen confidence in the university’s commitment to employee development.

***Implications for Practice***

Four implications for practice are outlined based on the findings of this study. Table 6 shows the key findings from this study and related recommendations for practice to further support each area of learning that represent the essence of how the individual participants noted they learned how to do their new jobs.

**Table 6**

*Study Findings, Conceptual Framework, Recommendations*

<b>Study Findings</b>	<b>Conceptual Framework</b>	<b>Recommendations</b>
1. Learning through Discovery	Proactive steps taken by the participant to learn tasks and using available resources to complete tasks on their own	Onboarding for new administrative assistants that offers tailored components unique to their departmental preferences and disciplinary focus
2. Learning from Prior Knowledge	Using prior or current knowledge to aid in completing tasks	Supervisors should ask new hires how they like to learn and assess prior knowledge base
3. Learning through Training and Development	Learning in an academic setting, job training setting or professional development setting either related to or not related to the specific job or role.	Universities should create standardized training developed and delivered by experienced administrators
4. Learning through Collaboration	Learning through social participation in groups or structured teams, sharing of expertise to construct new knowledge; using technology or individuals as resources to facilitate one's ability to complete a task or learn how to complete a task.	Develop a formal community/group of administrative assistants with support from the university’s leadership and academic deans

*Note.* The table illustrates the four primary findings of the study and recommendations based on the study's recommendations for each of the findings and the supporting conceptual framework for each finding.

**Standardized Training and Development.** In addition to concepts of organizational learning outlined in this study, particularly as it applies to the way organizations construct knowledge through workplace learning processes, staff training and development is central to optimizing individual performance (Kezar, 2005). The lack of a comprehensive training and development program for newly hired staff points to a key implication for practice. Throughout the interviews, participants communicated training was either not available, poorly designed, or not applicable. For example, some pointed to training that was not contextualized, or applicable, to the way their departments operated, while others stated the difficulty of following along with an instructor with no foundational understanding of the role and language of the tools itself, as a design failure. Others stated that training was frequently delivered by instructors who had only performed their job to varying degrees, and therefore did not know the nuances associated with each individual academic unit. Because the trainers were not attuned to changes in university policies that brought implications for managing and performing certain operational tasks, scant learning through standardized training and development occurred for majority of the staff participants in this study. Again, training is available on-demand and encouraged and supported by supervisors to attend, however, there is not a standardized program exclusively for administrative staff.

Based on these findings, my recommendation for universities that want to create standardized training and development programs for newly hired administrative staff is a two-pronged approach. First, develop training that includes rudimentary aspects of the job including a

road map that explains where you can go for various needs. For instance, if an administrative staff member needs to reserve a parking space for a guest visiting campus, book a conference room, or facilitate the hiring of a graduate student—to which office do they go? For example, Pippa pointed out that a road map would have been a good resource to point her in the right direction for whom she should ask her questions. This prong would also include in its training, an overview of the different types of training programs available through the university's learning management system (LMS) and individual business service departments. According to participants in this study, there is no consistent schedule or compendium of training offered by the business service departments.

The second prong of the rudimentary training would include training that is tailored to individual department functions and funding types. For instance, separate and smaller training classes could be held for administrative staff who manage federal and state money or administrative assistants whose departments only manage private money. This tailored approach would provide training for procurement needs that are unique to certain departments in small sessions. For instance, individuals who manage federal grant money and/or make large purchases, would receive training for those individuals separate from individuals who have small budgets with only private money. Moreover, if they have no budget responsibility, as was the case with Donna, there would be no need to attend that type of training.

In addition to this two-pronged approach, delivery of the training should incorporate adult learning principles. Specifically, trainers should aim to understand the work experiences of the employees as well as helping them understand the rationale for governing rules and guidelines. Standardized training that integrates adult learning principles into the delivery, will have a positive impact on preparedness to do their jobs effectively. Employing the Learning

Forward (n.d.) framework could help provide guidance on how to format these training approaches in a comprehensive way.

To help leverage administrative expertise and bridge potential knowledge gaps, facilitators of this training should include former or current staff who have experience in these roles. Such facilitators can provide a deeper understanding of the content that needs to be translated for training purposes. Additionally, these individuals can provide examples and scenarios to contextualize and situate the learner for a more impactful experience. Participants in this study commented that training facilitators were not familiar with their jobs nor their tasks. Consequently, they felt a disconnect with the training as well as a lack of confidence in the trainer's ability to help. By giving current experienced administrative assistants the opportunity to deliver some of the training, new hires also will have a point-person they can contact on a rolling basis.

This study also showed that professional development opportunities for staff to attend conferences or industry programming were rarely available. Only two participants indicated their departments covered the costs for attendance at conferences or professional development opportunities. However, all participants indicated an interest in attending either industry sponsored, or vendor sponsored professional development. Professional development has been made available by the university. Two participants stated they had attended professional development through the university's supervisor training program. Other types of formal training, such as academic classes offered by the university are self-selected by the participant and are normally included as part of the employee's job benefits and may or may not be directed connected to their job duties.



Based on these findings, I would recommend that supervisors and managers advocate and allocate financial resources for administrative staff to participate in professional development opportunities that are aligned with an individual performance plan. Knowles (1984) emphasizes in his adult learning theory the need for peer-to-peer learning to maximize the learning experience. Participants in this study indicated their interest in learning from others and alongside others as a method to knowledge building through learning. Many are already doing this in an informal setting. However, an investment of this type could add additional value towards feelings of appreciation and belonging among a group that feels underappreciated. Investing in professional development and standardized training is an investment in the employee. This type of investment could contribute to a highly motivated and satisfied administrative staff.

**Implement Formal Networks.** There is increased understanding that valuable learning occurs informally on the job, in groups, or in one-on-one conversations (Huber, 1991). Moreover, workplace learning is said to occur in both formal and informal pathways. This study showed that learning through co-operating and interacting with colleagues typically resulted in organically formed networks that occurred from various encounters at formal training sessions such as the university-sponsored orientation or department training on a new software system that is open for all administrators to attend. Collaboration was a key facilitator of learning how to do the job, underscoring the importance of informal networks within and among administrative assistants. Participants frequently offered examples of their learning process that included reaching out to a colleague as a first or second step in acquiring knowledge—a key component of the organizational learning Nevis et al. (1995) and Tynjälä (2008) workplace learning frameworks.

These informal networks are developed over time once a staff member develops relationships with other staff and colleagues at the university whose functional responsibilities are of a similar capacity. It is worth noting that there are some relationships that develop sooner due to the organizational proximity of the role, as examined in Vygotsky's (1978) Zone of Proximal Development learning and development theory, which emphasizes the role of social interaction in learning and development through cognition (p. 174).

Administrative assistants who participated in this study were open to knowledge sharing across academic units and welcomed the idea of a more formalized mechanism. To truly leverage the value of informal networks and the knowledge sharing capabilities they possess, I recommend developing a formal group of administrative assistants with structured support from the university's leadership and academic deans. Additionally, a partnership with the university's learning and development department would situate it alongside other learning and development mechanisms at the university to keep the group sustainable. One participant who had been in her role for 3 years, strongly suggested that formally developed networks such as a buddy system would have been valuable to her when she started her job. In her opinion, a buddy system or formalized network would ease the anxiety of not knowing what to do or where to get information to do your job.

**Formalize Onboarding and Enhance Orientations.** Organizations rely on historical knowledge, often called organizational memory, and the ability of individuals to remember what they have learned (Carley, 1992; Knowles, 1984). Each participant in this study entered their current job with prior knowledge from their previous job. In some cases, this prior knowledge was in a higher education setting, and for others it was not. Prior knowledge often informed how participants situated themselves in the role and how they organized themselves around the work.

Kevin was a participant who experienced a structured onboarding process, in contrast to Autumn who did not. Both had different experiences which led to their preparedness to do the job. Being prepared and confident in the job was important to each participant to varying degrees. Those who had worked prior in a higher education setting had slightly more confidence than those who did not. In both groups, however, a preference for thorough onboarding was important. In some cases, onboarding did not occur.

In addition to departmental onboarding, all but one stated they participated in structured orientation conducted by the university. Autumn and Savannah made specific reference to how helpful it was, but Kevin and Beth indicated that they wished it provided them with a better understanding of the business operations of the university. Onboarding and orientation are both introductory touch points that could help new hires feel more prepared. Figure 3 shows how participants in this study demonstrated their knowledge acquisition process. The finding that was most prevalent was learning through discovery. Participants communicated multiple ways they used online resources, indirect guidance from a colleague and peripheral learning to navigate their own job transitions and onboarding.

Creating an opportunity for new hires to feel they can succeed and be successful at their job is important and having effective onboarding and comprehensive orientation programs is key in achieving that. Orientation should continue to be offered by the university. However, I recommend onboarding be developed and delivered by the department or academic unit where the new administrative assistant will be working. This enabled administrative assistants to get the learn what is required and unique to their specific academic unit and to their operational preferences and disciplinary focus.

### **Recommendations for Future Research**

This study provided meaningful insights into 10 participants' experiences of learning how to do their job in their first 3 years of employment. The findings were consistent with the theoretical frameworks that anchored this study about learning how to accomplish new work responsibilities, yet also highlighted how the staff in this study felt a lack of appreciation for the work they were doing. Understanding more in future research about ways in which staff feel appreciated and how these levels of appreciation contribute to their learning is needed. Extrinsic motivations to learn (Vroom, 1964) are influenced by how much employees feel valued.

Many research studies in organizational learning are positivistic studies with empirical results, which provide direction for future practice but offer little in the way of tools for application (Dodgson, 1993). Additionally, these quantitative studies often lack the rich description that individual experiences of how learning happens in the workplace can offer. This deficiency of qualitative studies in the literature can have a significant influence on how leaders are informed during and throughout strategic planning processes and policy planning. This absence of qualitative research played a role in my decision to conduct a qualitative research study through the lens of phenomenology and underscores the need for more qualitative research on staff in general and on organizational learning in particular. Future research could also study the staff experiences over time. A longitudinal study of new staff members could help show how learning occurs in different career stages with a larger focus on how sharing and learning occurs.

Although this study was conducted using participants in a higher education setting, I would recommend additional non-positivistic research studies be conducted in corporate and governmental settings, with systems that are more tightly coupled and strategically aligned. Due, to the loosely coupled nature of academic units within research universities, it is possible that organizational learning practices with participants in other segments of the organization are more

difficult to assess due to the variability in leadership style and culture. Other areas of opportunity for future research involve group and organizational management disciplines. I recognized early on while conducting the semi-structured interviews that further research into organizational culture, belongingness, and group inclusion within the organizational learning framework is needed. As demonstrated in this research study, many instances of workplace learning took place in groups or with colleagues. As an organizational learning practitioner, it is not lost on me the role these employee perceptions of peer influence on learning have on an individual's ability to learn in the workplace. During my interview with Eugenia, she mentioned how she frequently consults her supervisor about certain tasks. She is still new in her job but feels her colleagues and her supervisor are growing impatient with her. Consequently, she has concerns about their perception of her ability to grow in the role and meet performance expectations. Additionally, exploring the types of interactions that occur within groups and how individual human needs are met. Shore et al. (2011) stated that the perceived feelings of inclusion and belongingness within individual work groups can help an individual feel included. Feelings of inclusion have a close connection to feelings of appreciation. The lack of appreciation was expressed by participants in this study. Thus, future research that addresses the dynamic of group inclusion to influence and positively impact organizational learning could occur.

Further research should also be conducted on how organizational learning and the knowledge gained from such learning is stored within the university. Administrative staff at universities come and go. How new knowledge is stored is critical toward achieving the real benefits of the practice and how and by what means and processes should it be stored and sustained. And last, research that addresses both strategic and tactical approaches of implementation could lead to meaningful growth in the field. Garvin's (1983) criticism of

organizational learning theorists was not directed at its relevance or value in the workplace. In fact, he appreciated the investment in such an important organizational practice. What he criticized was the use of the concept of organizational learning without application and tools for implementation. Similarly, as I think and contemplate the importance of organizational learning in the workplace, I think further research should be conducted on tools for implementing the concept in practice. There are so many conceptual designs about organizational learning but very few that offer tools for its application in practice.

### **Summary**

The organizational learning construct (Nevis et al., 1995) is not new and several variations exist in practice in the workplace. Whether it is used for process improvement, change management, or organizational efficiency, the use of knowledge-building through learning, when deployed effectively, can elevate individual performance, and increase organizational success. At the individual level, organizational learning offers new approaches to building capacity among segments of the workforce that have not traditionally been researched or examined—university staff in the case of this research study. Consistent with the phenomenological approach and the social constructive paradigm, I was able to explore on a deeper level with this group of participants the path to learning at work.

This study found that staff participants within three years of employment learned how to do their job in many different ways. Some learn through discovery, by using various methods and processes to guide them such as technology, trial and error, and collaboration with colleagues. Several used prior knowledge attained in other work environments to inform the way in which they lead in their current roles. Still, some learned more specific aspects of how to do their job through training and development. One very encouraging consistency was that all

participants in this job enjoyed their jobs. Most importantly, this study found that the decision-making about which process to use was driven by a participant's learning preference, and whether the task could be learned through the aforementioned processes.

The learning, organizational learning, and workplace learning theoretical frameworks introduced by Kolb (1984), Tynjälä (2008), Nevis et al. (1995), Argyris and Schön (1978), and Senge (2006) each provides a unique perspective into how learning occurs within organizations. to create competitive advantage and organizational renewal in today's global marketplace. Although implementation in higher education is still evolving, longitudinal studies and qualitative research examining individual learning and its impact over time, are not as developed nor definitive. Moving forward, the goal for organizational learning scholars is to aim for integration of the application tools across all levels of the organization to ensure each learning advancement is optimal for the whole enterprise. Within this larger context, this research concludes that organizational learning and its counterpart workplace learning should be further explored in higher education and that moving not just at the organizational level, but also at the individual level. However, moving toward this direction will require attention to the cultural elements and structural mechanisms that are required to facilitate the benefits and successful outcomes from its use.

**APPENDIX A**  
**A PRIORI CODES**

The following is a list of the A priori codes:

1. Learning by doing the job itself
2. Learning through co-operating and interacting with colleagues
3. Learning through working with clients
4. Learning by tackling challenging and new tasks
5. Learning by reflecting on and evaluating one's work experiences
6. Learning through formal education
7. Through extra-work contexts development focus



## APPENDIX B

### LETTER INVITING STAFF TO PARTICIPATE IN THE RESEARCH STUDY

Date

Dear <INSERT NAME> (interested research participant name):

My name is Rosanna Koppelman and I am a doctoral student in the School of Education at William & Mary. As part of the dissertation requirement, I am conducting a research study on the topic of organizational learning that could qualify for publication in a peer-reviewed journal. This research project has been approved by William and Mary's Protection of Human Subjects Committee. The focus of my research project is understanding the organizational learning methods used by staff in a college or university setting. The data generated with this study will be analyzed to understand staff perceptions of how they acquire, share, and utilize knowledge to advance organizational goals and objectives.

**I am looking for participants who have worked at the university for 5 years or less and are considered staff level employees and do not have dual staff faculty roles.** I appreciate your consideration and interest in possibly participating in this research study.

If you chose to participate, your participation will include two sessions. Both sessions will occur at a location that best fits your schedule and time constraints, to include virtual options. The first session will last approximately 60-90 minutes. The second session will occur 3-4 weeks later and will last approximately 45-60 minutes. All interview data generated will remain confidential, and participants' identities will not be disclosed in any form. Your participation is strictly voluntary and you may choose not to answer any question(s) during the sessions.

Thank you for your consideration to participate in our research study. If you are interested in learning more about the study and/or participating, please let me know by emailing a reply to me at [rakopp@wm.edu](mailto:rakopp@wm.edu), or by text at (757) 621-8906.

Respectfully yours,  
Rosanna Koppelman

## APPENDIX C

### INTERVIEW PROTOCOL

These semi-structured questions will guide follow-up questions.

#### *First Interview Questions:*

*Tell me a little bit about your job.*

*Probes: What motivated you to apply for the job? How do you spend a typical day/week? Are you in the same position as when you started at the university? [if not, what made you seek a new position?]*

#### *Role specific questions:*

- What, if any, aspects of your role do you feel you already knew prior to accepting this position? Did you have prior work experience in higher education?

*Probes: What technical skills did you have (software systems, etc.)? Customer service?*

- Did you have a clear expectation of your responsibilities and job functions when you started this job?

*Probes: What type of onboarding did you have? Who helped you learn your role responsibilities?*

- Describe the aspects of your job you felt you had to learn before you could be effective at your job and achieve what is expected of you.

*Probes: Technical skills? Policies and processes of the office/institution? Institutional software systems?*

- Describe the aspects of your daily job functions you feel less prepared to perform?  
*Probes:* Has this changed over time due to new or changing role expectations? Have you identified where you could gain these skills?
- How would you rate your skills level in your current position? Do you feel as though you are able to successfully complete all aspects of your job?
- Given the definition provided of what a learning organization is, do you believe your institution is a learning organization? Explain.

*Processes and structure specific questions:*

- If you need to learn something for your job, how do you go about learning it?  
*Probe:* Is there someone that is your go-to person?
- How do you achieve the learning you need in order to do your job?  
*Probe:* What method of learning best suits your learning style?
- Are there any sources you frequently turn to acquire the knowledge you need to do your job? Are these sources, if any, formal or informal? Internally or externally?
- What, if any, type of learning processes or aspects of being an operational staff member present challenges to you?  
*Probe:* If you had a magic wand, what aspect of your job would you change?
- What mechanisms are in place to support or facilitate knowledge building and sharing at your job and in your department?

*Second Interview Questions:*

- Describe the aspects of your daily job functions that you feel especially skilled to perform successfully.

*Probes:* Based on how they answered the technical skills capabilities from the first

*interview*, what technical skills are you good at doing? What expertise do you have regarding processes?

- As a learner, what aspects of your job performance would you like to enhance?

*Probes:* How might you acquire these skills? On the job? Formal training? Additional degree or certification?

- Do you feel you are performing your job at your highest capacity? Explain.

*Probes:* What supports your performance? What challenges your performance?

- If you were offered the opportunity to attend professional development, what type of professional development would you chose?

*Probes:* in-house training? Online? Off-site?

- Have participated in professional development, how recent was it?

- As I'm trying to understand more about how you have learned to perform your job requirements, what if anything did, I miss in the questions I have asked? Is there anything you would like to add?

## **APPENDIX D**

### **PRE-INTERVIEW DEMOGRAPHIC SURVEY**

Dear William & Mary Staff Member,

My name is Rosanna Koppelman, and I am a doctoral student at William & Mary's School of Education. As part of my dissertation requirements, I am conducting a research study on the topic of organizational learning methods among university administrative staff. The study is part of a growing body of research on university staff – a very important and critical group within university structures. The data generated in this study will be analyzed to understand staff perceptions of how they acquire, share, and utilize knowledge to advance institutional effectiveness.

I would like to enlist the help of employees that meet the criteria for my study and who would be willing to participate in the study. This quick survey is designed to collect preliminary information as a first step in the process. Thank you in advance for your submission.

Please answer the following questions:

1. In which department do you work?
2. Are you a part-time or full-time employee?
3. What is your job title?
4. How long have you been in your position/role?
5. What educational attainment level have you reached?
6. Have you served in the U.S. armed services?
7. Which of the following best describes your racial or ethnic identity? (Please check all that apply)

Thank you for completing this survey. If you are willing to take part in this research study, please provide your email address below, and more information about the study scope, timeline, and participation guidelines will be sent to you. If you have questions or would like to speak with me before you make a final decision, please email me directly.

## APPENDIX E: CODEBOOK

Parent Code	Child Code	Baby Code	Description
<b>By doing the job itself</b>			<b>Statements that refer to the participants independently driven, self-directed learning and indirect guidance from anyone on their team or in their department.</b>
	Indirect guidance		Statements that indicate the participant approaches individuals on an as-'needed basis for additional guidance as they are trying to learn something.
		Email	Statements that indicate that the participant used email to communicate and obtain knowledge or information to do their job.
		Instant Message	Statements that indicate the participant used IM methods
	Self-direct activities to Learn		Statements that refer to processes, resources, or activities used to help the individual learn that is directed or prompted by them.
		Cornerstone eLearning	Statements that indicate they accessed online classes or training through university sponsored LMS system.
		Internet	Statements that reflect the participant went to the Internet to learn something or to obtain information about something they needed to learn.
		LinkedIn Learning	Statements that indicate that they used this learning method.
		W&M Website	Using the university website to learn; including a department or academic unit website.
		YouTube	Statement that indicate they used this method to learn.
		Zoom	Indicates the participant used Zoom or some other face time technology to obtain indirect guidance by the participant.
	Self-directed aids for learning		Statements that refer to aids developed on their own to help them remember what they need to know for the job in their learning.

		Charts	Statements that indicate they used charts, or information organized or displayed to help an individual learn.
		Policy manual	Statements that indicate the participant uses a policy manual to learn how to do the job
		Sticky notes	Statements that refer to small notes with directions, codes, passwords, phrases or steps that help them learn.
	Trial and error		Statements that indicate the participant is attempting to do a task prior to seeking assistance; doing tasks one or more times until they have completed it correctly
<b>By reflecting on and evaluating work experiences (prior or current)</b>			<b>Using previous work experience to learn; learning from experience and reflecting on that experience to develop new skills, attitudes and ways of thinking and new awareness that did not exist previously.</b>
	Direct higher education work experience		Statements that indicate the participant has had some experience working in a higher education setting.
	No Prior Knowledge		Statements that indicate the participant had no prior knowledge of how to do the work.
	Non higher education work experience		Participant has had no prior work experience in a higher education setting.
<b>By tackling challenging and new tasks</b>			<b>Statements that indicate learning occurred through taking on a new task or a new work-related project that helped them learn.</b>
	Group project		Refers to shared project or joint project between departments or individuals
<b>Challenges to learning</b>			<b>Statements from the participant that indicate certain barriers in job that keep them from accomplishing tasks.</b>
<b>Facilitators of Learning</b>			<b>Statements that indicate ways that help facilitate learning.</b>
	Documents, policies, agencies on campus		Statements that indicate pre-established mechanisms such as documents were used to facilitate their learning.
	Individual people		Statements that indicate the facilitators of learning came from people inside or outside their employment

	Informal Network		Statements that reference "network of people" as a source of knowledge building.
	MS Team or IM Tech		Statements that indicate the participant utilizes IM to share knowledge or learn how to do their job or acquire knowledge
	Online resources		Statements that indicate they learned from online resources such as Cornerstone, website, etc.
<b>Formal Education</b>			<b>Structured classroom learning, academic classroom setting, job training programs, job related training programs, conferences</b>
	Informal training		Statements that indicate the individual is receiving one-'on'-one training informally
	Non-job related classes		Structured learning, formal, not associated with work
	Prior knowledge		Having prior knowledge of different systems or procedures
		MS office	Any programs in Microsoft Suite
		University specific systems	Systems used by the university such as Chrome River
	Professional Development		attendance to a conference or association sponsored event
	Training by university		In-person training that is part of the learning & development teams structured training program such as orientation
	Training for job		Training that is used to complete one or more aspects of the job, onboarding
<b>Job Effectiveness</b>			<b>Statements that indicate items that the participant felt they had to learn in order to be effective at their job.</b>
<b>Job Enhancements</b>			<b>Statements that indicate skills the participant would like to acquire in order to enhance their job skills.</b>
<b>Magic Wand Wish</b>			<b>Statement that specifically answer this question of: "If you had a magic wand and could change anything what would it be"?</b>
<b>Notes to Researcher</b>			<b>Excerpts I want to use for Chapter 4 &amp; 5</b>



<b>Offered professional development choice</b>			<b>Statement that answer the question of what type of professional development would you chose if it were offered to you.</b>
<b>Onboarding</b>			<b>Statements that relate to whether or not the participant received any type of onboarding.</b>
	Formal through HR		Indicates they received onboarding through HR and NOT the dept.
	Informal onboarding		Statements that indicate the participant received informal unstructured onboarding through their dept supervisor or others in their dept.
	No departmental onboarding		Statements that indicate the participant did not receive any type of formal onboarding through their department or dept. supervisor
<b>Orientation through formal mechanism or structured process</b>			<b>Statements that indicate the participant attended orientation that taught them how to do their job.</b>
	Departmental orientation		Refers to a formal prescribed onboarding used by the department for which the participant works.
	Industry association program		Refers to onboarding the participant attended that was provided by an industry association that offers training in their area
	Third-party orientation		Refers to orientation of onboarding offered by non-'university department
	University orientation program		Refers to orientation that individual attended
<b>Rich Quote</b>			<b>Quote from a participant that speaks to the heart and soul of the study and will offer unique insight to readers about the participants in the study</b>
	Skill Level		
	scale: 1-6		Statements that indicate a rating of moderately proficient
	scale: 7-10		Statements that indicate participant is growing in their learning at a moderate rate.

<b>Supports Development</b>			<b>A person, people, or mechanism that supports your development.</b>
<b>Task Completion</b>			<b>Statements that indicate how frequently tasks are completed on a daily basis.</b>
	scale: 1-6		Statements that indicate a moderate to average completion.
	scale: 7-10		Statements that indicate an above average completion rate.
<b>Through cooperating and interacting with colleagues</b>			<b>Learning through social participation in groups or structured teams, sharing of expertise to construct new knowledge</b>
	Communities of practice		Statements that refer to stand-alone meetings with two or more people to learn how to do something related to the job or work processes. It could also be an informal network.
	Email		Using email to communicate with someone to learn how to do something for your job, such as a new task.
	Peripheral Observations		Statement that indicate watching someone else go through steps or processes in order to learn how to do it themselves.
	sharing expertise to construct new knowledge		Statements that indicate one-on-one interaction with someone with deep knowledge or expert in their field.
	Sharing materials and resources		Statements of materials and resources that the participant has received from others to help them do their job.
		Shared document	
		Word document	
	Structured teams		Pre-organized team with members who have a clear objective and similar roles
	Using Instant messaging		Statements that indicate the participant used IM methods.
<b>Through extra work contexts</b>			<b>Joint planning and problem-solving across functional areas, from and with external teams or outside the organization with similar functions</b>
	Serving on university committees		Refers to learning that occurs incidentally through participation on a campus committee or team

<b>Through working with clients/constituencies</b>			<b>Statements that refer to working with other stakeholders; such as students, faculty, interdepartmental, and vendors.</b>
	Agencies or business services on campus		Units that are on-campus suppliers (dining services, copy center, etc.)
	Faculty		Instructors who interact with students and staff
	University sponsored Programs	Grants Office	
	Vendors		Third-party vendors/suppliers - Aramark, Doordash, Office Supply Room, etc.

## APPENDIX F

### RESEARCH PARTICIPATION CONSENT FORM

#### WHAT DO I HOPE TO LEARN FROM YOU?

This investigation, titled “Organizational Learning: Methods for knowledge building among staff in higher education” is designed to explore your perceptions and experiences as a staff employee at an institution of higher education and the organizational learning processes you use to acquire, share, and utilize knowledge in your role. Additionally, I am interested in the specific sources or mechanisms you utilize within your organization to develop the knowledge you need to successfully complete your job duties.

#### WHY IS YOUR PARTICIPATION IMPORTANT TO THIS STUDY?

Studying your perceptions and experiences will help me better understand the various aspects of your role at your university or college, and the factors that go into your organizational learning processes and decisions – such as where you go to get knowledge, and if those places are internal or external to the organization in which you work, or primarily based within your program or academic unit. This study is being conducted as part of the doctoral dissertation requirements for the School of Education at William & Mary.

#### TIMELINE:

Data generation for this research study will take place from July through October 2022. Within this timeframe two interviews will take place with each participant. Continuous checking and reviewing to verify the accuracy of interview notes and interpretations will also take place during this period.

#### WHAT WILL BE REQUESTED FROM YOU?

- Two sessions in person if possible or via video conference. The first session will last approximately 60-90 minutes. The second session will last approximately 45-60 minutes.
- At the beginning of the first session, I will request a copy of your job description as part of the participant-generated artifact. This will give me an opportunity to better understand the context of your job duties and ask more targeted questions during the interview stage.
- At the beginning of the first session, completion of a prompt which asks participants to answer the question, “Tell me their job title, and a little bit about your job/role at your institution?”
- At the beginning of the second session, which is focused on the impact of knowledge building, I will ask the participant to share the impact of their contributions with 1-2 examples of their perceptions of their most meaningful contributions to the university.
- Once the interviews are completed, and all data generated artifacts are collected, I will request that you allow me to analyze it as part of the data for this study.
- Following the interviews, I will contact you via email to confirm our understanding of your responses through interview summaries. Corrections or modifications of the data which may not reflect your intent, thoughts or experiences will be corrected at your discretion.

**ADDITIONAL INFORMATION:**

Please know that:

- The confidentiality of your personally identifying information will be protected to the maximum extent allowable by law.
- Your name and other identifying information will be known only to the researcher through the information that you provide. Neither your name nor any other personally identifying information will be used in any presentation or published work without prior written consent.
- The audio recordings of the two interviews described above will be erased after the study has been completed.
- You may refuse to answer any questions during the interviews if you choose. You may also terminate your participation in the study at any time. (To do so, simply inform me of your intention.)
- Your participation in this study is completely voluntary.
- A summary of the results of the study will be sent to you electronically once they are completed.

**HOW CAN YOU CONTACT US?**

If you have any questions or concerns about this study, please contact me, Rosanna Koppelman ([rakopp@wm.edu](mailto:rakopp@wm.edu)) at William & Mary, Williamsburg, Virginia or by calling (757) 621-8906. If you have additional questions or concerns regarding your rights as a study participator or, if you are dissatisfied at any time with any aspect of this study, you may contact, anonymously if you wish, Dr. Pamela Eddy ([peddy@wm.edu](mailto:peddy@wm.edu)) at William & Mary, Williamsburg, Virginia (757- 221-2349). If you have additional questions or concerns regarding your rights as a study participant or are dissatisfied at any time with any aspect of this study, you may contact, anonymously if you wish, Dr. Tom Ward at 757-221-2358 ([tjward@wm.edu](mailto:tjward@wm.edu)) or Jennifer Stevens ([jastev@wm.edu](mailto:jastev@wm.edu)), chairs of the two William & Mary committees that supervise the treatment of study participants.

By checking the “I agree to participate” response below, then signing and dating this form, you will indicate your voluntary agreement to participate in this study and confirm that you are at least 18 years of age.

- I agree to participate.
- I don’t agree to participate.

A copy of this consent form will be given to you to keep.

**SIGNATURES:**

Participant: \_\_\_\_\_ Date: \_\_\_\_\_

Researcher: \_\_\_\_\_ Date: \_\_\_\_\_

## **APPENDIX G**

### **RESEARCHER AS INSTRUMENT**

The focus of my research is on organizational learning and its connections to knowledge building for organizational growth, competitive advantage, and institutional effectiveness. Specifically, I am interested in how organizational learning occurs at the staff level within institutions of higher education. Moreover, as part of this research I hoped to learn more about the staff learning process/methods and mechanisms that advance learning and knowledge building throughout the organization. I conducted this study through the lens of a social constructivist paradigm. The method of inquiry included interviews with staff level employees in a variety of academic units who work in institutions of higher education. I selected phenomenology as my strategy. It was my hope that emergent themes through interview data supported my premise that organizational learning at the staff level is critically important. And that subsequently, the knowledge generated at this level should be valued and highlighted as critical to the advancement of institutional effectiveness and strategic planning efforts.

#### **Background and Relevant Experiences**

My first two jobs after graduating undergraduate school were in the corporate environment in the oil and gas industry and in telecommunications. Positions in these industries included account executive, staff writer, public relations and marketing roles. After my stint in the corporate environment, I served as the executive director of executive education/professional development for 15 years at William & Mary's Mason School of Business. This was my first job in higher education. To date, it is the only institution of higher education in which I have worked.

I held two positions at the business school in both degree and non-degree programs. The first was director of the part-time MBA program with primary duties that included recruiting, admissions, and student affairs functions. The second, and longest held position, was as executive director of the non-degree executive education program. In this program I was responsible for sales/new business development, program design, client customer relationships, P&L (profit and loss), and faculty recruitment for program delivery. This position was multi-faceted and was the revenue-generating arm of the business school. Both positions contributed to my personal commitment to staff growth and interest in staff capacity-building and knowledge development.

The experiences of staff within institutions of higher education vary. My biases about higher education are shaped mostly by my experience as a staff employee at W&M. My interactions with other staff colleagues, administrators and faculty also play a role in my biases. There were a few unique experiences that made a sizeable impact on my interest in this research topic in what I feel are the under-researched areas regarding the value of staff contributions. For example, thinking back to a lot of the decision-making that happened and how often staff were not part of the decision-making process piqued my interest in studying staff roles. Staff were generally consulted after the decisions that impacted their programs were made. I felt this process was flawed. I felt decisions and policies that were made should involve staff, particularly because they were mostly in support or operational roles, where the bulk of the changes were being made. Moreover, shared knowledge opportunities were not always appreciated between academic units and were not widely accepted by the leadership at my academic unit. This often gave me the impression that I wasn't permitted to share with other units' knowledge that would

help them grow their programs. Our leadership did not strongly support knowledge sharing, even though I felt that it was important for knowledge sharing across campus to take place.

Other areas that have shaped my opinion are the areas of finance and budgets. When budget cuts happen at the program level, they impact staff members' ability to attend higher education conferences or enroll in professional development opportunities. In my opinion, this limits the knowledge building capabilities of staff in a way that is not always recognized by administrative leaders.

During my tenure at W&M's business school, I also faced what in my opinion, was gender and race discrimination and microaggressions. I felt this very strongly during my efforts to champion the school's first diversity and inclusion initiative. I was approached by the dean to spearhead this initiative, however, not everyone seemed to feel it was a worthwhile cause – particularly my boss. On many occasions he would ask me what projects I was working on and would often tell me that there needed to be equal emphasis on “the White man.” Comments like these gave me the impression that diversity and inclusion at the school were not important to him (who identified as a White man). As the years went on, I was kept out of key leadership conversations that he was having with the dean. These were conversations that I had once been a part of prior to his arrival. Obviously, these were my perceptions, however, they were also my truths and experiences. Similar situations were happening to other staff of color at the school disproportionately particularly with respect to power. Programs that were doing well financially were often given preference when it came to space allocation or policy exceptions. This was not uncommon with the flagship MBA full-time program. The dean would frequently give preference to staff who worked in that program relative to requests from staff in other programs.



My perception about power was that the staff were the low people on the totem pole. There was a phrase staff would use, “bottom-feeders,” whenever we were left out of the conversation or if we didn’t get a proverbial seat at the table. There seemed to be an understanding that the rank system at the business school positioned staff at the bottom. If you weren’t faculty – you didn’t have the dean’s ear. I felt my treatment, and the treatment I saw inflicted upon other staff, was due mostly because of our titles.

### **Values**

I currently work in the organizational learning and culture space in the legal industry. I also have developed my knowledge and skills in organizational diversity and inclusion. I believe that diversity, equity and inclusion are most effective when integrated into an organization’s learning and development strategy. Additionally, I consider myself an educator. Learning, knowledge building and professional development are key to advancing organizational growth and understanding around diversity and inclusion. My foray into this combination of areas stems from my values. Both of my parents were educators. They emphasized to me and my siblings that education, continuous learning and personal growth were foundational to any success we expected to achieve. We came from a family of firsts. My father was the first African American to receive a PhD from the University of Pittsburgh in pure mathematics. My great-grandparents were some of the first primary and secondary school teachers of color in segregated Arkansas. Creating opportunities for underserved and underrepresented working professionals is important to me because I know how it contributes to economic mobility and career advancement. I am particularly sensitive and partial to advancing opportunities for personnel in organizations that are heavily ranked based. By that I mean they have clear delineations between support and operations personnel relative to people in senior leadership roles who bear executive level titles.

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## VITA

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#### **Professional Experience:**

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2020 – 2021: Organizational Learning & Development Business Consultant, Independent Contractor, Yorktown, VA

2013 – 2020: Executive Director, Center for Corporate Education, William & Mary, Williamsburg, VA

2008 – 2012: Director, Part-time MBA Program, William & Mary, Williamsburg, VA

2006- 2008: Director of Marketing, Center for Corporate Education, William & Mary, Williamsburg, VA

1999 – 2003: Assistant Director of Marketing, AT&T Wireless Services, Anchorage, AK

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