A CULTURE OF LEARNING
IN
ONE NON-PROFIT ORGANIZATION

by

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ABSTRACT

The purpose of my research is to describe and analyze the facets of the learning culture in one non-profit organization. Based on my reading, I define a learning culture as: the observable and unobservable processes, structures, norms, and communication patterns that support ongoing, work-related, learning for employees.

I relied on Schein’s (1985, 1992, 2004) levels of culture theory to guide my study. Schein posits that culture must be explored at three levels: “artifacts” (observable symbols and structures), “espoused beliefs and values” (the articulated ideologies of the organization), and “underlying assumptions” (the unconscious beliefs that are shared amongst members of a group). Accordingly, I selected a three-phase qualitative approach to provide a rich description of one organization’s learning culture. Using semi-structured interviews, focus groups, and document analysis, I investigated the firm’s learning culture. I targeted two groups: organizational representatives and employees. I further divided my employee group into two subgroups: administrators (management) and frontline employees (those who provide direct care for clients), in order to glean a broad perspective of the learning culture and how different groups perceive that culture.

My research allowed me to describe the organization’s culture of learning. I uncovered a mismatch, however, between the organization’s espoused values regarding work-related learning and the employees’ perspectives on their learning. The organization articulates that it actively promotes and encourages learning for its employees; yet, the employees perceive their learning to be supported, but not readily encouraged. I tentatively conclude that perspectives on learning seem to be a function of employee role. This study offers some insight into the challenges of investigating an organization’s culture, both theoretically and methodologically.
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CHAPTER 1

INTRODUCTION

My thesis is a descriptive case study and analysis of the culture of learning in one organization. To protect the anonymity of the organization, I will henceforth refer to it as H2L, a pseudonym that I created. H2L is a non-profit, health care organization in Eastern Ontario with approximately 500 employees. Its structure is typical of a hierarchical organization, with layers of management reporting to an Executive Director. The organization’s mission is to provide supports and facilitate opportunities for individuals with developmental disabilities to become more independent. The majority of staff at H2L are considered frontline employees who work directly with clients.

Following my first visit to H2L, I wrote a lengthy reflection on what I saw, felt, and heard. While I waited for my interview sessions to begin, I saw how physically disabled the clients were. Many of these people were in wheelchairs and were non-verbal. Later, while visiting a satellite H2L location, I had the opportunity to interact with clients who were higher functioning. I soon realized how important H2L is to its clients; it provides them with opportunities for learning and personal growth that might not exist elsewhere. This interaction with clients spurred a deeper interest in understanding the organization’s culture of learning.

I purposefully chose to study a culture of learning because it blends together two areas of personal and academic interest: sociology and education. I think that my excitement for my research was maintained throughout my thesis journey because I was studying something that I truly enjoy and that I find fascinating.
As I continued to read, reflect, and talk about the culture of learning at H2L, I became increasingly invested in my research. I wanted to undercover the learning activities that are available to employees and their perspectives on work-related learning. As a researcher, however, I made every attempt to ensure validity in my data by employing a multi-method qualitative approach to study the learning that occurs at H2L by certain employee groups.

I used semi-structured interviews, focus groups, and document analysis techniques to help unpack how learning is regarded by, occurs in, and is supported by H2L. To glean a holistic description of this learning, I incorporated the perspectives of three distinct groups of employees in my research: organizational representatives, administrators, and frontline employees. Initially, this seemed like a fairly straightforward task. I planned to conduct focus groups and interviews with employees from different levels within the organization. Then, I would aggregate their responses and endeavour to draw some concrete conclusions about the extent to which the perspectives on learning are shared amongst employees. I had read about organizational culture; I had taken research methods courses; I thought I was prepared. However, I was naïve in my degree of preparation. Discerning the shared assumptions regarding learning and attempting to analyze the culture of learning at H2L qualitatively proved to be a challenging task. To do this, I was diligent with my approach and sought to remain scrupulously methodical throughout the research process.

In this introductory chapter, I briefly outline the rationale for my study. I then define my three key terms: organizational culture, culture of learning, and workplace learning. I next describe the purpose of my study and outline my methodology. The remainder of this chapter discusses my thesis design, including a brief description of the content of each chapter.
Rationale for Study

I began my research with the core premise that learning in an organization is essential for employees (Collinson & Cook, 2007; Edmondson, 2008; Garvin, Edmondson, & Gino, 2008). As a result of my own professional experiences, I started from my belief that employees must continue to broaden their scope of skills and knowledge. My thinking was supported by the literature: our knowledge-based economy demands high levels of technical expertise and specialization; professional development and workplace learning serve as conduits through which employees learn the knowledge, skills, and attitudes required to succeed in their roles (Appelbaum & Gallagher, 2000; Salas & Von Glinow, 2008). Globalization, technological innovation and advancements, and economic complexity mean that organizations require a flexible and adaptable workforce (Fullan, 2008). Major (2000) suggests that organizations, in response to the changing market demands, expect their employees to engage in learning that is continuous and allows for both personal and professional development.

Defining the Terms

Three terms are integral to my study: organizational culture, culture of learning, and workplace learning. I define each of these terms below.

Organizational Culture

As my literature review (in Chapter 2) reveals, definitions abound for organizational culture (e.g., Fombrun, 1983, Pettigrew, 1979, Martin, 2002, Scholz, 1987). For the purposes of my research, I have chosen to rely on Schein’s (1985) definition of organizational culture:

A pattern of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration that has worked well enough to
be considered valid and, therefore, to be taught to new members of the organization as
the correct way to perceive, think, and feel, in relation to those problems. (p. 17)

Despite subsequent editions of Schein’s text (1992, 2004), his initial definition remains
unchanged. While I have certainly not exhausted my search of the culture literature, it is apparent
that Schein is foundational in the field. He is frequently cited by academics (e.g., Cook & Yanow,
1993; Lucas & Kline, 2008; Popper & Lipshitz, 2000), and his research appears in recognized
organizational theory texts (e.g., Daft & Armstrong, 2009; Hodge, Anthony, & Gales, 2003;

**Culture of Learning**

Since I could not locate a comprehensive definition of the term ‘culture of learning’ in
my review of the literature, I chose to construct my own definition of the term, based on my
reading (e.g., Garvin, 2000; Schein, 2004; Tran, 2008). I define a culture of learning as: the
observable and unobservable processes, structures, norms, and communication patterns that
support ongoing, work-related, learning for members of the organization (i.e., the employees).

I think that the terms ‘organizational culture’ and ‘a culture of learning’ are distinct.
Learning is a part of organizational culture, in the sense that employees learn how to think and
behave in an organization. Through social interactions, employees develop an understanding of
the organizational norms—the implicit and explicit work processes and procedures. A culture of
learning, however, focuses on individual learning that informs the work that employees do.
Characteristics of a culture of learning include a deep commitment to learning at all levels of the
organization, opportunities for feedback, communication, and self-reflectivity; psychological
safety, embracing diverse learning styles, and aligning individual learning goals with
organizational goals. A learning culture, then, refers to the extent to which learning is embedded in an organization’s culture. A more detailed exploration of this term is found in Chapter 2.

**Workplace Learning**

I crafted my own definition of workplace learning based on the literature that I have read (e.g., Fenwick, 2008; Malcolm, Hodkinson, & Colley, 2003; Marsick, 1988; Senge, 1990). I use the terms work-related learning and workplace learning interchangeably in my research. I do so because I did not want to mislead my participants into thinking that workplace learning is restricted to learning that occurs on-the-job, as the term implies. During conversations with my participants, I defined workplace learning to be the following:

Any work-related learning in which you have participated or are aware of in your organization. This learning may include formal (i.e., organized and supported by H2L) or informal training and professional development. The learning could have taken place at your own initiative, or been mandated by the organization to help you in your job. You may have participated in the learning on your own, or in a group, either onsite or offsite. I provide a more detailed review of the literature on workplace learning in Chapter 2.

**Purpose**

Believing that learning is fundamental to an organization, I embarked on my research. Its purpose was to describe and analyze one organization’s culture of learning. I wanted to ascertain the extent to which perspectives on how learning is regarded by, occurs in, and is supported by the organization are similar and/or different amongst distinct employee groups within the organization. Extracting and exploring these perspectives should enable me to understand, analyze, and describe the culture of learning at H2L.
I created three questions to help guide my study:

1. What are some of the employees’ assumptions about their work-related learning?
2. To what extent are these assumptions about work-related learning shared across the organization?
3. How are these assumptions supported by artifacts within H2L?

**Overview of Methodology**

I adapted Schein’s (1985, 1992, 2004) levels of culture in order to study my selected organization’s culture of learning. I wanted to carry out research to unveil H2L’s “espoused beliefs and values,” “underlying assumptions,” and “artifacts” regarding work-related learning, in order to gain a rich description of the culture of learning. Accordingly, I conducted a three-phase research study. First, I conducted two semi-structured interviews with two individuals in the organization’s human resources department. I deemed these individuals to hold the ‘organizational perspective’ on work-related learning because they are closely involved with scheduling, planning, and monitoring the training, learning, and professional development opportunities available to employees. Second, I interviewed two groups of employees—administrators (management) and frontline employees (who work directly with clients). I conducted two focus groups: one administrator focus group and one frontline employee focus group. Third, I held semi-structured interviews with individuals in each employee group. I included four administrators and four frontline employees in my individual interviews. The result of my three-phase data collection strategy was 12 interview transcriptions. To complement these transcriptions, I referred to my field notes and reflections, as well as organization documents that I had collected throughout the research process.
Overview of Thesis Structure

My thesis is comprised of five chapters. This introductory chapter provides the rationale for my study and its purpose. I defined my key terms and outlined my methodology. I now outline the remaining chapters.

My second chapter presents a review of literature on both organizational culture and workplace learning, the two main facets of my study. I present organization culture in terms of substance (its constituents) and process (the ways in which it has been studied). I weave these conditions into my review of the literature on organizational culture. I discuss informal and formal workplace learning and the conditions that help to support and facilitate learning in an organization. The literature review is a foundational piece of my thesis because it informed my methodology and data analysis, the chapters that follow.

In Chapter 3, I discuss in detail the methodology that I developed for my research. This chapter includes a description of my research purpose and the key questions that undergirded my study. I describe the theoretical framework that underpinned my research. Next I outline the steps that I followed in order to collect, code, analyze, and interpret my data.

Chapter 4, the data analysis chapter, synthesizes my findings. I begin the chapter by reviewing how I extracted the themes in my data. Grounded in my review of the literature, I present the findings according to the two main sections: one, organizational culture; and two, workplace learning. Each section includes themes that emerged in my review of the literature and in my research. I compare and contrast the perspectives of the three participant groups throughout my analysis.

I conclude my thesis in Chapter 5. In this chapter, I summarize my key findings according to my three overarching research questions. I propose recommendations for the
organization to more deeply embed learning in their organization’s culture. I suggest possible avenues for future research resulting from my study. I also discuss the significance of my work and its contributions to both the literature on organizational culture and to the practical aspects of researching an organization’s culture.

The following chapter, Chapter 2, provides a review of the literature on two aspects underpinning my work: organizational culture and workplace learning.
CHAPTER 2

A REVIEW OF THE LITERATURE

This chapter presents a review of the literature on organizational culture and workplace learning, two intrinsic components to my thesis research. I have structured my literature review into two sections. In the first section, I discuss organizational culture both in terms of substance and in terms of process. First, I provide a synthesis of the definitions of organizational culture. Second, I outline the elements of culture that are revealed in the literature. Third, I identify the methodologies, tools, and techniques that exist to unpack and describe an organization’s culture, both quantitatively and qualitatively. In the second section, workplace learning, I describe the evolution of research on workplace learning and the conditions necessary for cultivating a culture of learning. First, I outline the significance of workplace learning. Second, I describe three levels of learning that occur in the workplace: individual, group, and organization. Third, I discuss two types of workplace learning: formal and informal. Fourth and last, I outline components of a culture of learning and explore how theorists propose organizations create a culture of learning.

Section I: Organizational Culture

Since the early 1970s, the body of literature exploring culture in an organizational context has grown significantly (Martin, 2002). As such, definitions, conceptualizations, and research examining the origins, constituents, and significance of organizational culture abound (Martin). According to Fullan (2008), organizational culture is paramount to the success of an organization. Although academics have not yet agreed on the definition of organizational culture, they have reached some agreement about the concept. Organizational culture is considered to be abstract, multidimensional, multifaceted, and dynamic (e.g., Jacques, 1951; Kotter & Heskett, 1992; Schein, 2004; Schwartz & Davis, 1981). The abstract nature of organizational culture, argued
Meek (1988), contributes to the challenge in attempting to describe the culture of an organization, as well as how to determine its representativeness and pervasiveness within an organization.

Schein (2009) proposes that culture is akin to the character of an organization. Commonly referred to as “the way we do things around here,” culture is the norms, beliefs, attitudes, and values that are shared amongst members of an organization (Schein). Culture is both a product and a process; it is socially constructed and facilitates the process of socialization for employees (Bolman & Deal, 2003). Therefore, an organization’s culture is shaped both by forces that are external to the firm (e.g., the culture of the country in which the firm is situated), and internal forces (e.g., the aggregate of values evident in the firm).

Defining Organizational Culture

I begin this section by defining the term ‘organization.’ Daft and Armstrong (2009) say that organizations are: “(1) social entities that are (2) goal-directed, (3) designed as deliberated structured and coordinated activity systems, and (4) linked to the external environment” (p. 9). An organization is made up of people with diverse backgrounds, experience, skills, and roles (Hodge, Anthony, & Gales, 2003). The people in the organization, the employees at all levels and in all departments, help to create, shape, and maintain the culture (Schein, 2004). What, then, is organizational culture?

In general, organizational culture is described by academics, such as Deal and Peterson (2009), Martin (2002), and Schein (2009), as values that are shared amongst organizational members. These shared values are learned over time. They help to guide the ways in which employees, think, act, and feel in the workplace.

An early definition of organizational culture was that of Jacques (1951). He defined organizational culture as: “the customary or traditional ways of thinking and doing things, which are shared to a greater or lesser extent by all members of the organization and which new members must learn and at least partially accept in order to be accepted into the service of the
firm” (p. 251). This definition indicates that culture is a shared phenomenon, helping to integrate and socialize members of an organization. Culture helps to normalize and guide the actions and thoughts of employees. Jacques argues that, for employees to be accepted in the firm, they must ascribe to a common pattern of thoughts and behaviour. Thus, culture, according to Jacques, has both cognitive and behavioural dimensions.

Pettigrew (1979) added to this definition by providing a temporal dimension. His definition of culture is: “the system of publically and collectively accepted meanings operating for a given group at a given time. This system of terms, forms, categories, and images interprets a people’s own situation to themselves” (p. 574). Schwartz and Davis (1981) contributed to the definition by proposing that culture is “a pattern of beliefs and expectations shared by the organization’s members that create ‘norms’ that powerfully shape the behaviour of the individuals and groups in the culture” (p. 33).

As research on the topic of organizational culture gained momentum in the 1980s, the researchers added new aspects and concepts to the term. For example, in 1982, Kilmann defined culture as: “the collective will of members” (p. 11). It is “what the corporation really wants or what really counts in order to get ahead” (italics in original, p. 11). Two aspects make this definition unique. First is the notion that culture is implicit. That is, culture may not be explicitly stated in an organization’s public documents, but it is implied or unconsciously felt in the firm. Second, culture is an integral component of an organization in order to facilitate its competitive advantage. Both of these aspects continue to appear in the literature (e.g., Salas & Von Glinow, 2008; Scholz, 1987).

Then, in 1983, Fombrun provided a definition of organizational culture, describing culture as the: “emergent patterns of beliefs, behaviours, and interaction that uniquely characterize the organization as it operates within an industrial and societal context” (p. 139). This definition is important because it views culture as having characteristics that help to identify and to differentiate organizations. In addition, Fombrun’s definition recognizes that an
organization is tied to its operational environment, but is also influenced by other external factors, such as community.

In 1985, Schein published the first edition of *Organizational Culture and Leadership*. There, he defined culture as:

> A pattern of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members of the organization as the correct way to perceive, think, and feel, in relation to those problems. (p. 17)

Schein has continued to research organizational culture (1992, 2004), but has not changed his definition of culture. In both texts and journals, academics refer to Schein’s definition of organizational culture (e.g., Daft & Armstrong, 2009). It weaves together the notions of time and context as relevant for shaping culture, and highlights that culture is shared amongst organizational members as a guide for establishing norms, thoughts, and feelings. What Schein’s definition does not mention, however, is the role of culture in shaping the behaviour of members in an organization. Schein purposefully does not include behaviour in his definition because he says that he believes that behaviour is controlled by and is a result of factors that are beyond the scope of culture. To clarify this point, Schein provides the example of a loud executive entering a meeting. Employees may respond to the volume by cowering, but this response could be a biological reflex and not necessarily the result of shared learning. The group’s response (i.e., behaviour) should not be understood as a cultural clue.

The definition of culture was changed somewhat by Frost, Moore, Reis Louis, Lundberg, and Martin in that same year (1985). They described culture as “the importance for people of symbolism—of rituals, myths, stories, and legends—and about the interpretation of events, ideas, and experiences that are influenced and shaped by the groups within which they live” (p. 17). Their addition of symbolic meaning sets this definition apart from Schein’s. Schein does not explicitly mention the symbolic importance of culture in his definition or the meaning that people
assign to culture. Kotter and Heskett (1992) describe culture as having two levels that differ with regards to visibility and adaptability to change. They said that culture is: (1) “values that are shared by the people in a group that tend to persist over time even when group membership changes” (p. 4); and (2) “the behaviour patterns or styles of an organization that new employees are automatically encouraged to follow by their fellow employees” (p. 4). Hodge, Anthony, and Gales (2003) also defined culture as a two-level concept, having elements that are both observable and unobservable. They said that observable symbols of culture include “architecture, dress, behaviour patterns, rules, stories, myths, language, and ceremonies” (p. 248); unobservable components are “shared values, norms, beliefs, and assumptions of organizational members” (p. 248). Culture is the meshing of the observable and unobservable levels of culture that provides direction for responses to problems and environmental conditions. Their definition, however, does not specifically mention that culture evolves over time, or may differ between groups within the organization.

I found van den Berg and Wilderom’s (2004) definition to add another aspect to the definition of organizational culture. They defined organizational culture as the “shared perceptions of organizational work practices within organizational units which may differ from other organizational units” (p. 571). Their definition specifically delineates organizational culture as relating to the work that occurs within an organization, between departments and divisions (i.e., subcultures). Moreover, it refers to ‘perceptions’ instead of relying on values or beliefs.

In addition, Ravasi and Shultz (2006) enhanced the definition of culture by incorporating context-specificity. That is, culture is “a set of shared mental assumptions that guide interpretation and action in organizations by defining appropriate behaviour for various situations” (p. 437). However, similar to Jacque’s (1951) definition of culture, Ravasi and Shultz view culture as both cognitive and behavioural.

Daft and Armstrong (2009) offer a more recent definition of culture, which, I contend, is merely an aggregation of previous definitions. “Culture is the set of values, norms, guiding
beliefs, and understandings that is shared by members of an organization and is taught to new members” (p. 335), and their whole discussion on culture relies heavily on Schein’s (2004) work. They said that there are two levels of culture: what can be seen, and what is invisible (much like Kotter and Heskett (1992), and Hodge, Anthony, and Gales (2003) argued).

Accordingly, from my review of the literature, I use the following as my working definition for the term ‘organizational culture’: The dominant values, thoughts, and beliefs that are shared amongst members of an organization. The shared values are reflected in observable and unobservable symbols, and perpetuated by interaction amongst members over time. My definition is largely taken from Schein (1985, 1992, 2004) because I think that his definition is most comprehensive, and is used and referred to by other researchers (e.g., Cook & Yannow, 1993).

**Components of Organizational Culture**

In many ways, culture provides members of an organization with a sense of stability (Hofstede, 2001; Schein, 2004). Culture serves as both unconscious (implicit, covert) and conscious (explicit, overt) guides for acceptable thoughts, feelings, and actions/behaviours. To some extent, employees are united by the culture of their organization, in the sense that culture is the glue holding the organization together (Schein, 2009). Culture is perpetuated through social interactions and symbols that reinforce the values that the organization holds. Thus, culture is extremely value-laden (Fombrun, 1983). Therefore, delineating the elements of an organization’s culture requires unpacking the values that are integral to the organization. Accordingly, I begin this section with a discussion on instrumental values. Next, I synthesize the other key concepts that appear in the literature on organizational culture, such as organizational specifics and operational environments. I then present a discussion on symbols, including the significance of language, communication, and knowledge management, stories and myths, organizational rites, rituals, ceremonies, heroes, and heroines to understanding an organization’s culture.
**Instrumental values.** Connor and Becker (1994) define values as “global beliefs (about desirable end states or modes of behaviour) that underlie attitudinal processes. In particular, they serve as the basis for making choices” (p. 68). When this definition of values is applied to the workplace, I infer that an employee’s personal values may impact her work-related attitudes and behaviours. My inference is supported by Stackman, Pinder, and Connor’s (2000) research, which suggests that values, attitudes, and behaviours are linked together in a causal chain: values guide attitudes, and attitudes are subsequently revealed in behaviour. While attitudes are context-specific, values are deeply embedded in an individual’s psyche and are not solely dependent upon situation. To clarify, a manager may value punctuality as a characteristic in her employees, but her attitudes toward punctuality may differ, based on situations. For example, the manager may be lenient with one employee who arrives late to a staff meeting, but have little tolerance with another employee who misses a deadline due to inefficient project management. Regardless of the situation, the manager values punctuality, but it is her reaction to the behaviour of her employees that is modified.

As the definitions on culture illustrated, culture is shaped by the people in an organization working together for a common purpose in a specific environment. Employees contribute their own experiences, skills, and values to the organization; together they create and maintain a culture that is unique to the firm. If values are conceived of as strongly linked to shaping individual behaviour and attitudes, and culture is value-laded, it follows that culture is a conduit for influencing the thoughts, beliefs, and actions of employees in an organization and creating organizational norms. According to Swidler (1986), culture is the aggregation of values that exist within a firm.

It is necessary, however, to differentiate the terms ‘corporate culture’ and ‘organizational culture.’ While the two terms are often blended together and used interchangeably, they are distinct. Whereas ‘corporate culture’ is based on the values of management diffused through an organization (i.e., a more top-down approach), ‘organizational culture’ includes the values of all
members in an organization (McAuley, Duberley, & Johnson, 2007). A dyadic relationship exists between leaders and the culture of their organization (Schein, 2004). How leaders elect to manage their organization, the values that they espouse, and the policies that they adopt, impact the culture of the organization.

Meek (1988) posits that if members of an organization do not subscribe to the dominant values of the culture, then they are “outside culture” (p. 458). Intuitively, it is reasonable to assume that employees would desire to be part of the culture, especially if they are seeking to remain competitive with their colleagues. Thus, culture is a strong conduit for guiding ‘correct’ patterns of actions and thoughts.

Conversely, even if values are shared, an organization might not be cohesive (Meek, 1988). It is false to assume that all members of an organization will share the same ideals and values. Since organizational members are diverse, subcultures form within an organization. Subcultures may form in an organization based on an individual’s membership to a diverse array of groups and the values that these groups hold. Geography, hierarchy, occupation, and departmental affiliations are examples of fodder for the formation of subcultures (Alvesson & Sveningsson, 2008; Martin, 2002; Schein, 2004). Subcultures themselves may become fragmented because of power tensions that may exist between groups (Martin).

**Organization specifics and operational environments.** Fombrun (1983) proposed four critical dimensions of organizational culture. First, he argued that the size of an organization influences the relative power of the organization, and the ability to have “deviant” culture (p. 142). That is, larger firms are more likely to develop subcultures, which may or may not subscribe to the overarching values espoused by the organization. Second, the life stage of an organization also affects its cultural diversity and the strength of the organizational culture. Corporations at the early stages of development are focused on understanding the operational environment, gaining credibility amongst competitors, and establishing systems that will promote effectiveness and efficiency. Firms that are at the opposite end of the life stage continuum are
concerned with maintaining success by reducing cost. These firms have a history and rely on the strategies that have been tested and proven to produce results. Third, an organization’s growth strategy shapes its corporate culture. Fombrun said that organizations must ensure that their value-orientation aligns with and supports the strategic direction of the firm. For example, if an organization values productivity, then it should seek to ensure that it has the support systems in place to allow employees to continue to increase their output. The firm should direct its business plan to increasing production efficiency, and minimizing cost of production. Fourth, an organization’s internal control systems provide insights on the culture. Specifically the formal structure of the organization, the reporting systems, financial systems, human resource policies and procedures are indicative of the values that an organization holds.

The country in which an organization operates also impacts the culture of the organization (Gerhart, 2008; Hofstede 1980, 2001; Jackson, 2001; Schneider, 1988). Hofstede has extensively studied, compared, and contrasted the cultural values across nations. In particular, Hofstede (2001) noted differences in power and certainty; he also explored the impact that individualism/collectivism, and masculinity/femininity have on national cultures. Applying his research to organizations, he attested that the culture of a nation is distinct from, but complementary to, the culture of an organization. His organizational culture research was based on an analysis of 20 units in ten different organizations (five organizations in Denmark and five in the Netherlands). Hofstede posited that values and practices differentiate organizational cultures from national cultures. That is, members of national cultures possess similar values but differing practices. Organizational members, in contrast, hold differing values, but behave similarly. Socialization occurs during the formative years of life and leads to the acquisition of values that individuals will likely adhere to throughout their life. Practices, however, are adopted in the workplace during adulthood. Hofstede suggested that when employees enter an organization, they bring their own values to their workplace; despite learning new practices on the job, through socialization, their values remain constant. Personnel departments, according to
Hofstede, ensure that employees who are hired ascribe to the values that the organization espouses. Hofstede’s analysis demonstrates clearly that organizational culture is linked to and perpetuated by values.

**Symbols.** Culture is manifested in both observable and unobservable ways. Symbols provide tangible representations of intangible values and beliefs in an organization; they are “expressions of shared sentiments and sacred commitments” (Deal & Peterson, 2009, p. 33). Symbols are powerful; they give meaning to what cannot be understood rationally, and they influence cognitive and behavioural patterns. Culture experts (e.g., Bolman & Deal, 2003; Deal & Peterson, 2009; Schein, 2004, 2009; Martin, 2002) propose that symbols represent an organization’s culture. Pettigrew (1979) goes so far as to refer to symbols as cultural offspring. Symbols include the manner in which employees dress, the architecture/structure of the organization, and the policies and procedures that are espoused by the organization (Martin). Schein (1985, 1992, 2004) refers to the observable representations of culture as artifacts; he suggests that they are a key component to understanding the culture of an organization. Three symbolic representations of organizational culture are language, communication, and knowledge management. I describe each below.

Language helps to integrate members to an organization; language is often exclusive to an organization and is an integral component of culture (Martin, 2002). Language is socially transmitted. Through social interactions, members of an organization become familiar with each other and impart their own values, beliefs, and ideals. By talking with one another, employees begin to understand the past historical events that have helped to shape the organization. Learning about ‘critical incidents’ leading to the introduction of certain policies or procedures, or the development of special events and celebrations is an example of this. Thus communication can be about the positive and negative aspects of culture.

Organizational culture is fostered, in part, as employees communicate with and learn from one another. Language is both mediated by and contributes to the creation of organizational
culture (Barley, 1983; Brown & Starkey, 1994; Martin, 2002). Culture helps to establish the patterns and mediums of formal and informal communication. The information that is transmitted during employee interaction helps to reinforce and perpetuate the culture. Whether employees are sharing personal or professional details, communication connects employees together by developing common understandings of each other, work, and circumstances. As Brown and Starkey illustrated in their case studies, face-to-face conversations may be the preferable form of communication in one organization, while another organization may prefer e-mail correspondence. Thus, the dominant mode of communication within an organization helps to shape its culture.

Jargon creates language that is specific to an organization (Martin, 2002). Jargon includes technical terms and acronyms that relate to the product, process, and industry of an organization. Metaphors may be included in organizational jargon. Martin argues that the use of jargon, being familiar with the vocabulary and language of the firm, allows employees to feel like exclusive members of the organization. An employee’s fluency with the organizational language reflects the employee’s ability to learn and understand the culture.

The ways in which information is managed within an organization impacts the organizational culture (Bennett, 2009). Brown and Starkey (1994) discuss the significance of ‘information consciousness’ in creating culture. The availability of corporate information, the ease with which this information is readily accessible, and the ability of employees to find the information that they need, all contribute to the culture of an organization. For example, one organization may encourage its employees to be innovative and take initiative with solving problems and pursuing new projects or products (i.e., distribute its leadership amongst employees), while another organization has its formal leadership as solely responsible for decision-making.

Bennett (2009) argued that technology shapes the culture of an organization. In particular, technology facilitates alternative work strategies by enabling employees to be virtually
connected. Bennett refers to these alternative work arrangements as ‘virtual human resource
development.’ Meetings can be conducted via videoconference rather than incurring the time and
expense required for in-person meetings. In addition, the use of company Intranets (websites that
are available only to employees) is a popular conduit for ensuring that employees have access to
the information that they need in order to be successful on the job and to continue to build their
own skills and knowledge. According to Bennett, the way in which a company designs,
implements, and monitors its Intranet is indicative of its culture. Online training opportunities and
social networking are also made possible because of technology, further guiding the culture of the
organization.

Stories are anecdotal accounts of organizational historical events and employees, told
from the perspective of employees. The messages conveyed in the stories told by employees
reinforce the dominant values of the firm and become part of the organization’s history. It is the
role of the leader, according to Deal and Peterson (2009), to ensure that only positive stories
endure. Stories build identity for the firm and communicate this identity to employees and the
broader community. Thus, it is crucial that organizational stories portray the firm favourably.
Deal and Peterson attest that leaders who passionately and convincingly engage their employees
in organizational stories help to perpetuate a positive work environment. Boje’s (1991) research
indicates that employees abbreviate stories, selectively conveying details and facts. Storytellers
also manage their stories by embedding them in conversations. Context plays a critical role in
providing meaning for stories. The same story, then, may have a completely different message,
depending on when and in what situation it is told. Further, a story’s impact is dependent upon
the skill of the storyteller.

Stories are narrative symbols of the culture that is unique to an organization; they are also
a medium for exploiting organizational myths (Bolman & Deal, 2003). Myths are hyperbolic tales
of past organizational events or employees. These tales continue to grow and become grander as
they are shared amongst employees. Deciphering the truth in myths is challenging because these
stories have been shaped by a large number of parties, each of whom have added their own perspective and input to the tale. Martin (2002) alleges that stories generally have morals; they are told with purpose to convey specific meaning.

Organizational culture is perpetuated, in part, through ‘cultural forms’ (Martin, 2002) such as rites, rituals, and ceremonies (Beyer & Trice, 1987; Martin; Trice & Beyer, 1984). These tangible expressions of culture publicly display and celebrate the dominant values of the organization. I differentiate among rites, rituals, and ceremonies and show how each event symbolically reinforces and reflects an organization’s culture.

Beyer and Trice (1987) define a rite as “a relatively elaborate, dramatic, planned set of activities that combines various forms of cultural expressions and that often has both practical and expressive consequences” (p. 6). They argue that rites provide a deep understanding of culture because they encompass other cultural forms. That is, rites are made possible because of shared language, symbols, artifacts and so forth and employees discuss rites using cultural forms such as myths, sagas, legends, or stories. Rites become unconsciously ingrained in the organization.

Six categories of rites that occur in organizations have been identified (Beyer & Trice, 1987; Trice & Beyer, 1984). These rites are deeply rooted in and serve to strengthen the culture. Rites of passage allow new employees to take on new roles. Basic military training is an example of a rite of passage. Rites of degradation bring to the fore an employee’s poor performance or unacceptable behaviour. Beyer and Trice (1987) use the example of “firing and replacing top executive” (p. 11) to illustrate a rite of degradation. In contrast, rites of enhancement celebrate employee successes. Rites of enhancement include events that publicly recognize an employee’s performance, such as ‘employee of the month.’ Rites of renewal aim to restructure the organization in order to enhance firm performance, such as strategic planning sessions. Rites of conflict reduction, such as collective bargaining, aim to assuage aggression within the firm. Rites of integration facilitate a bond between employees by creating common experiences, such as a holiday office party.
The work of Trice and Beyer has been adapted by some scholars (e.g., Hofstede, 2001; Martin, 2002). In Daft and Armstrong (2009)’s adaptation, the typology of organizational rites includes passage, enhancement, renewal, and integration (omitting conflict reduction and degradation). It is not clear why Daft and Armstrong omitted two categories of rites in their discussion, other than perhaps to emphasize positive organization rites, rather than ones that may result in negative consequences. Regardless, organizational rites bond employees together with common experiences, both negative and positive.

Deal and Peterson (2009) argue that in order to understand culture, organizational rituals must be explored. They say that: “without ritual, any culture will wither and die” (p. 89). Rituals are events that are repeated with purpose to provide direction and build a sense of community. Rituals construct organizational routines and solidify trust amongst organizational members. Rituals, according to Martin (2002), are planned with care and occur in a public setting. Rituals have a well defined, prescribed, beginning and end point; each organizational member plays a specific role in an organizational ritual. Functionally, rituals “create order, clarity, and predictability” (Bolman & Deal, 2003, p. 260) because of their repetition. Rites, particularly integration rites, exemplify ritualistic events; they occur continuously and with a specific purpose.

Ceremonies, according to Deal and Peterson (2009), are defined as “complex, culturally sanctioned events in which organizations celebrate successes, communicate values, and recognize the special contributions of employees” (p. 101). Rituals and ceremonies are similar, but vary in their frequency. While rituals occur more frequently, and are ingrained in the daily practices of organizations, ceremonies occur on special occasions and at a much grander scale (Bolman & Deal, 2003). Events that annually recognize the tenure of employees and showcase successes are examples of ceremonies. Tokens of gratitude exchanged during the ceremonies (such as handshaking) are ritualistic in nature. Ceremonies foster traditions in the organization (Deal & Peterson).
Organizational members deemed heroes and heroines are “living logos, human icons” (Bolman & Deal, 2003). Through their words and deeds, these employees fulfill niche roles in an organization because they have outstanding characteristics. Their reactions to particular events, their innovative ideas, and their initiative are exemplars for current employees. Heroes and heroines are not necessarily constrained to executive levels; they emerge and exist throughout the organization. The actions of heroes and heroines may be used as templates and guides when current employees are confronted with similar situations.

In summary, values are the foundation of organizational culture. These values permeate the organization in tangible and intangible ways. Symbols, such as language, are tangible representations of culture. An organization’s history, tradition, and legacy also underpin its culture. Employees with tenure are cultural transmitters who informally and formally relay corporate stories and myths to new employees (Bolman & Deal, 2003). Knowledge of past company events, successes and failures, responses to threats, opportunities, and change are powerful indictors for the future direction of the firm (Bolman & Deal). Organizational ceremonies, rites, and rituals are symbolic events that consciously and unconsciously enable culture to flow through an organization.

Methodologies to Explore Organizational Culture

Empirical research on organizational culture appears to be somewhat limited (Skerlavaj, Indihar Stemberger, Skrinjar, & Dimovski, 2007; van den Berg & Wilderom, 2004). Current organizational culture studies seem to be predominantly grounded in qualitative methodologies that aim to describe the culture of an organization. The ‘strength’ of an organization’s culture, that is, the extent to which it permeates an organization, is assessed with tools that seek to quantify culture (e.g., surveys and questionnaires).

I discuss the methodologies that have been and are being used to describe the culture of an organization. I begin with a discussion on emic (conducted by individuals within the
organization) and etic (carried out by individuals outside of the organization) research studies. I then provide a brief history of the methodological approaches that have been used to explore organizational culture, to contextualize my discussion of qualitative and quantitative methodologies that follows. I examine theoretical frameworks in the literature that describe culture in terms of levels. I then review three qualitative methodologies used to interpret the culture of an organization: interviews, document analysis, and metaphors, which help to describe and interpret organizational culture. Finally, I review the use of questionnaires, the predominant quantitative methodology used to investigate an organization’s culture.

**Emic vs. etic research.** An organization’s culture may be studied and analyzed from two different perspectives. Cultural studies may either originate and be managed by internal members of the organization (an emic study) or by consultants working outside of the organization (an etic study). These analytical approaches each have advantages, as well as challenges and obstacles that limit the validity of the research (Martin, 2002; Schein, 2009; Scholz, 1987). Insiders (i.e., employees), according to Scholz, have the tendency to view their organization positively and are unable to provide an objective analysis of the organizational culture; as well, outsiders (i.e., consultants) may bring also their own biases to the research because of preconceived notions about the firm. Smircich (1983) recognizes the challenge of analyzing an organization’s culture objectively from either perspective. To conduct a cultural audit accurately from either perspective, Scholz (1987) posits that researchers require specific training and knowledge—about what constitutes an organization’s culture and what methodology to use to study culture. Accordingly, organizations carrying out their own cultural research may fail to capture an accurate and holistic understanding of their organization’s culture due to a lack of expert training and knowledge of existing research tools. Scholz argues that culture is closely tied to the strategic direction of a firm. He says that ineffectual and limited culture research may provide a weak, and biased, resource for strategic planning. Consequently, a superficial cultural study may possibly
misguide the firm’s beliefs regarding employee satisfaction, engagement, and commitment (or whatever dimensions and elements the study is seeking to explore).

Consultants, especially those highly trained in the field of organizational culture, are well positioned to study organizational culture from their etic perspective (Peterson & Deal, 2009; Schein, 2009). Martin (2002) states that etic cultural studies are often quantitative, based upon some form of self-report survey or questionnaire that attempts to describe the culture within an organization according to some predefined attributes. It is unlikely that an organizational outsider will be able to spend enough time immersed within the culture to glean an in-depth understanding of the values, attitudes, and beliefs shared amongst employees.

I now provide a brief history of the methodological approaches to conducting organizational culture studies. The use of qualitative and quantitative methodologies to explore organizational culture has varied over time. Martin (2002) gives a succinct overview of the history of cultural studies. She said that tension has always existed between qualitative and quantitative cultural researchers. Qualitative case studies published during the 1960s were highly criticized for their inability to adhere to scientific methodology and perceived lack of validity; quantitative studies utilizing surveys and questionnaires proliferated. However, the 1980s saw a resurgence of qualitative cultural studies. During this period, quantitative studies were viewed as “narrow, dry, and restrictive” (p. 213) because they were limited in their exploration of cultural themes and ideas. Qualitative research became legitimized because of its holistic and in-depth approach to exploring cultural themes within an organization. Thus, qualitative research re-emerged during the 1980s and 1990s, helping to shift the paradigm of cultural research. Martin concludes by proposing that cultural researchers should familiarize themselves with both qualitative and quantitative research methodologies, and should employ a multi-method research approach, when possible. A recent mixed-method study is that of Bustamante, Nelson, and Onwuegbuzie (2009), whose purpose was to test the validity of the Schoolwide Cultural Competence Observation Checklist. An online questionnaire, combined with narrative responses,
produced both qualitative and quantitative data. This mixed-method approach allowed for data triangulation, enhancing the data’s trustworthiness (Duncan, 1989; Patton, 2002).

I now review the two types of methodologies to explore organizational culture: qualitative and quantitative.

**Qualitative research strategies.** Culture is commonly described based on levels (Daft & Armstrong, 2009; Fombrun, 1983; Schein, 2004; Scholz, 1987). Therefore, I begin my discussion on qualitative research strategies with a discussion on cultural levels. Then, I describe two methods (interviews and document analysis) used to facilitate a description of culture. The last descriptive tool I present is metaphors.

Society, industry, and organization are three levels, according to Fombrun (1983), which coexist and often simultaneously impact the culture in an organization. The societal level of culture, for Fombrun, refers to the country (i.e., the society) in which the organization operates, including the political and ideological climate. Examining culture at the industry level requires looking at the ways in which the organization’s operational environment (i.e., its industry) impacts the organization. Fombrun delineates this level as the “norms that develop around secrecy, political stance, dress, lifestyle, and ‘the way we do business’ in the industry” (p. 141).

Lastly, the organizational level relates to the life stage of the organization and its competitive strategy.

Like Fombrun, Scholz (1987) proposes three dimensions to describe organizational cultures: evolution-induced, internal-induced, and external-induced. To clarify, the evolution-induced dimension of organizational culture explores the corporate history of the organization, namely, how the organization has responded to change. The internal-induced dimension of culture, for Scholz, is concerned with the ways in which problems are solved in the organization. Examining the external-induced dimension of organizational culture requires investigating the extent to which the external environment impacts the organization (i.e., the events that have helped to shape the structure of the organization and its procedures).
Daft and Armstrong (2009) describe culture at two levels: visible characteristics (e.g., the organizational chart, the mission, vision, and architecture, etc.) and invisible characteristics (e.g., norms and values). Their work relies on that of Schein (1985, 1992, 2004). Schein has proposed the broadest framework to study organizational culture. He proposes a three-level organizational culture model.

Schein (1985, 1992, 2004) argues that the study of organizational culture requires an understanding of a group’s ‘shared assumptions.’ These multidimensional assumptions are based on how the group responds to its external and internal environments. The process of environmental adaptation and integration facilitates the development and maintenance of organizational culture. He says that in order to understand the ‘shared assumptions’ of an organization, a cultural analysis, or audit, must be undertaken at three levels: “artifacts,” “espoused beliefs and values,” and “underlying assumptions.” Each level is clarified below.

Schein (2004) contends that “artifacts” must be examined first. He says that artifacts are observable. They are what people “see, hear, and feel” (p. 25) in an organization. Examples of artifacts are internal policy and procedural documents, architecture, products, language, rituals, and ceremonies. Organizational symbols, such as the company’s logo, are also cultural artifacts.

Second, “espoused beliefs and values” must be explored. These include organizational ideologies, morals, and ethical rules. The espoused beliefs and values are usually contained in the organization’s documents and outline how the organization should operate. For example, the processes and procedures in place to facilitate and evaluate goal attainment, as well as the tactics that are used when goals are not satisfied.

The third aspect of culture is the exploration of “underlying assumptions.” Schein (2004) says that these assumptions are the “unconscious, taken-for-granted beliefs, perceptions, thoughts, and feelings” (p. 26). Organizational norms help to guide emotions and actions. That is, the ‘correct’ way to think and behave in an organization. These norms can be perpetuated by the stories that members share (usually relating to past organizational events). Schein points out that
the beliefs and values that an organization espouses may, in fact, be contrary to its actual operations, and thus it is necessary to study what is actually occurring in the organization and the underlying assumptions.

Several researchers have adopted Schein’s levels of cultures framework to unpack an organization's culture (e.g., Ashkanasy, Broadfood, & Falkus, 2000; Daft & Armstrong, 2009; Hatch, 1993; Waegemakers Schiff, 2009). Ashkanasy et al. say that Schein’s work transcends a particular methodological approach and is relevant to both qualitative and quantitative research. Hatch (1993) expanded Schein’s model to include four processes by which culture is formed: realization, symbolization, interpretation, and manifestation. Hatch considers her model as a more holistic conceptualization of culture because it “brings together in one model ideas that have traditionally been kept separate in organization theory” (p. 683). Hatch’s model is in a wheel formation, signifying that culture is a cyclical, and processes are linked in a “forward (proactive/prospective) and backward (retrospective/retroactive) temporal modes of operation” (p. 687). Instead of exploring how artifacts and values help to shape shared assumptions (as Schein does), Hatch suggests examining the values, artifacts, symbols, and assumptions that contribute to an organization’s culture. Thus, Hatch’s model places less importance on the notion of shared assumptions. Instead, she proposes a process approach to understanding organizational culture. Hatch is focused on understanding the interconnected relationships between the cultural variables (values, artifacts, symbols, and assumptions), rather than delineating the elements that comprise culture. To study these processes, Hatch proposes ethnographic techniques, including observation and interviews.

I agree with Hatch’s adaptation of Schein’s work because Hatch’s model incorporates symbols into the concept of organizational culture. Hatch critiques Schein for taking a linear and temporal approach to culture. While Hatch’s model is, dynamic, it adds complexity to the concept of organizational culture. Hatch suggests that studying the four cultural processes (manifestation, realization, symbolization, and interpretation) requires using ethnographic techniques such as
ethnographic observations, participation, and interviews in order to document and fully glean an understanding of how these processes shape culture. Time will tell whether or not Hatch’s model is used; in my opinion, Schein’s ‘levels’ framework has been used and then adapted (e.g., Daft & Armstrong, 2009; Deal & Peterson, 2009) and I believe it is more feasible to apply.

Linstead and Grafton-Small (1992) also support a process approach to the understanding of organizational culture. They ascertain that an organizational culture study should pay close attention to the processes that foster and shape the culture (i.e., what is going on in the organization that contributes to the formation of values, beliefs, and behaviours), instead of focusing merely on culture as a product. Using Smircich’s (1983) terminology, culture is something an organization is, not something an organization has. Understanding culture, then, requires embracing the processes through which it emerges and is manipulated. Further, these authors posit that culture is a “discursive complex” (p. 350) and the practices of organizational members, especially in a social context, must be included in a cultural audit.

Schein (2004; 2009) recommends conducting interviews through focus groups with employees in order to obtain an understanding of the shared assumptions that exist in a firm. Schein (2009) constructed a guide entitled The Corporate Culture Survival Guide to facilitate the in-depth study of an organization. This guide provides an overview of the three key levels associated with organizational culture and includes sample questions to explore culture in the firm, from the leader and then employees’ perspectives (using a focus group). I found it a practical tool to unpack an organization’s culture.

Schein’s text includes an eight-step methodology, providing a pragmatic approach to conducting focus group interviews. The focus group process, emphasizing culture change, is based on Schein’s three levels of culture framework. Those steps are:

1. Conduct a focus group session using flipchart paper.
2. Have a focus-group facilitator begin the session by clearly outlining the objective of the session (i.e., the ‘problem’ the group is attempting to solve).
3. Facilitator reviews the concept of culture and Schein’s ‘levels of culture’ framework.

4. Focus group members list artifacts that represent the culture in their organization.

5. The group aims to determine the organization’s espoused values.

6. The group compares the espoused values and artifacts that have been identified.

7. The group strives for consensus about the shared assumptions held regarding the culture.

8. The group determines how the data collected will be used and the extent to which it will be used to inform organizational decisions. The focus group process may need to be repeated with a different group within the organization.

Schein proposes a feasible and seemingly comprehensive model to explore organizational culture. Being unable to find any others, I use his model to frame my research. Table 1 summarizes how Schein’s model allows a researcher to uncover a firm’s cultural elements.

Table 1.

*Using Schein’s (2004) Levels of Culture to Unpack Culture Elements*

<table>
<thead>
<tr>
<th>Culture Level</th>
<th>Culture Elements</th>
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</thead>
<tbody>
<tr>
<td><strong>Artifacts</strong></td>
<td>• Size of organization</td>
</tr>
<tr>
<td>“Visible organizational structures, and processes” (p. 26).</td>
<td>• Organizational life stage</td>
</tr>
<tr>
<td></td>
<td>• Control systems</td>
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<tr>
<td></td>
<td>• Country of origin</td>
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<tr>
<td></td>
<td>• Architecture</td>
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<td>• Technology</td>
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<td></td>
<td>• Work arrangements</td>
</tr>
<tr>
<td></td>
<td>• Rites, rituals, ceremonies</td>
</tr>
<tr>
<td></td>
<td>• Heroes/heroines</td>
</tr>
<tr>
<td><strong>Espoused Beliefs and Values</strong></td>
<td>• Growth strategy</td>
</tr>
<tr>
<td>“Strategies, goals, philosophies” (p. 26).</td>
<td>• Mission and vision</td>
</tr>
<tr>
<td></td>
<td>• Company documents</td>
</tr>
<tr>
<td></td>
<td>• Language/jargon</td>
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<tr>
<td></td>
<td>• Knowledge management</td>
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<tr>
<td></td>
<td>• Communication patterns</td>
</tr>
<tr>
<td></td>
<td>• Stories and myths</td>
</tr>
<tr>
<td><strong>Underlying Assumptions</strong></td>
<td>• Reflected in artifacts and espoused beliefs and values.</td>
</tr>
<tr>
<td>“Unconscious, taken-for-granted beliefs, perceptions, thoughts, and feelings” (p. 26).</td>
<td></td>
</tr>
</tbody>
</table>
Peterson and Deal (2009) provide a tool similar to Schein’s. Their *Shaping the School Culture Fieldbook* contains a multitude of questions and activities that can assist school leaders attempting to understand their institution’s culture. The fieldbook is framed around their work on the elements of culture, and aims to delineate and depict the vision and values, rituals and ceremonies, histories and stories, informal networks amongst employees, and visible symbols of culture (e.g. architecture, documents, etc.) in the organization. The fieldbook goes beyond just describing a school’s culture; it also provides direction on transforming school culture, including tactics for managing toxic cultures, all beyond the scope of my research. The book is intended to give leaders tools of observation, reflection, and dialogue—all to become familiar with the cultural clues in their organization, and analyze patterns of behaviour.

Schein (2009) and Peterson and Deal (2009) suggest incorporating document analysis techniques into the understanding of culture. Exploring the mission, vision, policies, and procedures as well as other company documents facilitates an understanding of the values and ideologies that are espoused by an organization. By cataloguing and analyzing the observable representations of culture, they contend that researchers are able to glean a deeper understanding of organizational culture.

Metaphors, according to Bolman and Deal (2003), “capture subtle themes that normal language can overlook” (p. 267). They provide several examples of metaphors for organizations. For example, an organization may be described as a ‘well-oiled wheel,’ ‘symphony orchestra,’ ‘maze,’ or ‘three-ring circus’ (p. 267). Goffman (1959) describes organizations as theatres; others describe organizations as machines, organisms, and communities (e.g., Smircich, 1983). These metaphors conjure up selective images of an organization’s effectiveness and communication. If culture is viewed as central to the organization, it seems reasonable that the metaphor used to describe an organization also reflects the culture of the organization.

Hodge, Anthony, and Gales (2003) include a discussion about ‘thick’ and ‘thin’ cultures in their text. A culture is thick if it permeates an organization and is accepted throughout the organization.
organization; members share common assumptions and norms. A thin culture, in contrast, is not widely held or accepted throughout the organization; values are not commonly held across the organization. In addition, organizational cultures have also been described in terms of their ‘strength’ (Chatman & Cha, 2003; Peters & Waterman, 1982; Scholz, 1987; Weick, 1985). I contend that ‘thick’ and ‘strong’ are terms that convey similar meanings and may be used interchangeably to describe culture.

**Quantitative research strategies.** I now review the implementation of questionnaires as the predominant quantitative measure to assess organizational culture. According to Ashkanasy, Broadfood, and Falkus (2000), questionnaires are a useful assessment tool for measuring organizational culture because they allow respondents an opportunity to provide their personal perspectives on culture. Since questionnaires are completed at a convenient time and in private, their responses may be more honest and truthful than in a qualitative research setting. Furthermore because culture is an aggregation of personal perceptions (attitudes, values, and beliefs), questionnaires are a viable method to glean input from participants.

Jung, Scott, Davies, Bower, Whalley, McNally, and Mannion (2009) reviewed the literature on available instruments that explore organizational culture. Their work, commissioned by the National Institute of Health Research in the United Kingdom, sought to document the quantitative and qualitative tools that exist to assess and measure organizational culture. In total, 70 organizational culture instruments were identified, 48 of which include psychometric testing. To create a complete analysis, the researchers scoured the international journals and included instruments in their review that applied to a variety of contexts (i.e., both public and private sectors). The researchers concluded that while many similarities exist between the tools, the nature (i.e., design) of the instruments is dependent upon the purpose of the study. Similar to Martin’s (2002) findings, they found that questionnaires are the most common form of cultural assessment tools because of the ease with which they may be implemented in organizations, including their low-cost and time efficiency. Qualitative research on organization cultures
includes the use of participant observation, interviews, and document analysis. Furthermore, while qualitative and quantitative strategies each offer relative strengths and weaknesses, choosing one strategy over the other requires a “trade-off between depth and breadth of data: qualitative approaches offer detailed insights, while quantitative approaches allow for the examination of larger sample sizes” (p. 1093). Again, as Martin (2002) suggests, a multi-method research approach may overcome these methodological concerns.

The questionnaire/survey methodology, however, has its limitations (e.g., Ashkanasy, Broadfoot, & Falkus, 2000; Schein, 2009). Schein is critical of implementing surveys to assess and understand organizational culture. He says that surveys are narrow in scope and problematic for six reasons. One, the person designing the survey may not know what questions to include in the survey or what themes to address. Without speaking with colleagues directly, it is challenging to ascertain the issues that need to be explored in the survey. Two, surveys may reflect “superficial characteristics” (p. 79) because they do not allow for in-depth analysis of assumptions. Three, participants may have difficulty interpreting the questions on the survey, especially if the questions are vague or not clearly written. Four, surveys do not enable observation of employee behaviour. Five, surveys provide individual responses and do not allow for an exploration of shared assumptions (the core of culture, according to Schein). Six, surveys may raise questions or issues, which the organization may not be prepared to respond. Schein’s critical stance on survey methodology suggests that a quantitative approach to studying organizational culture may be easier to implement, but the data may not yield an in-depth description of an organization’s culture.

Similarly, Ashkanasy, Broadfoot, and Falukus (2000) criticize the merit of questionnaires for studying organizational culture. They posit that analyzing questionnaires usually results in “typing or profile scales” (p. 133), which pigeonholes the culture of an organization into prescriptive categories. Schein (2004, 2009) is also critical of describing organizations based on typologies. According to Schein, cultural typologies are narrow and focus on how employees
perceive their organization, without exploring how embedded the culture is within the organization. Thus, elements of culture are omitted when organizations are analyzed based on typologies.

A recent example of a typological culture study is Patel and Patel’s (2008). This study proposes four types of learning cultures that exist within an organization. These learning cultures include: fatalist, hierarchical, competitive, and egalitarian (p. 238). The authors define each learning culture by the type of learning strategy the group employs. Fatalist learning cultures use avoidance strategies, whereas hierarchical cultures focus on the creation of specialized knowledge. Competitive learning cultures emphasize innovative ideas, while egalitarian learning cultures foster learning in social situations. The type of learning culture in an organization, therefore, helps to determine the learning strategy that is adopted and the extent to which innovation is promoted. The categories the authors propose are prescriptive and narrowly define the learning cultures that may exist within a firm. Their study does illustrate that typologies continue to prevail in cultural research.

The Organizational Culture Profile (Ashkanasy, Broadfoot, & Falkus, 2000) and the Organizational Culture Inventory (Cooke & Szumal, 2000) are two examples of quantitative tools that are available to assess and interpret organizational culture. The Organizational Culture Profile seeks to enable an empirical, theoretically valid study of organizational culture by quantitatively exploring ten dimensions of organizational culture. These ten dimensions include: leadership, structure, innovation, job performance, planning, communication, environment, humanistic workplace, individual development, and socialization (Ashkanasy, Broadfoot, & Falkus, 2000, p. 141). The Organizational Culture Inventory examines 12 categories of cognitive and behavioural norms for employees to satisfy expectations and be accepted members of the organization or subunit. These norms are grouped into three sets: ‘constructive cultures’ emphasizing achievement, self-actualization, humanistic tendencies and encouragement, and affiliation; ‘passive/defensive cultures’ emphasizing approval, convention, dependence, and
avoidance; and, ‘aggressive/defensive cultures’ emphasizing opposition, power, competition, and perfectionism (Cooke & Szumal, 2000, p. 149). Both the quantitative tools lend themselves well to describing organizational culture using a typology.

**Summary.** According to Schein (2009), conducting an organizational culture study serves little purpose unless it is focused and attempts to solve some type of problem that exists within the organization. Thus, organizational culture research often focuses on changing some type of attribute or function within a firm. Culture is not static; it evolves over time, as new members enter the organization. Accordingly, cultural audits must be ongoing to reflect the changing values and practices within the firm.

It appears as though organizations are recognizing the importance of creating a thick organizational culture, as a means to promote competitive advantage and corporate sustainability (Linnenluecke & Griffiths, 2010). In my literature review, I came across a program that is sponsored annually by Waterstone Human Capital. The program seeks to recognize “Canada’s 10 Most Admired Corporate Cultures.” Each year, approximately 500 executives are asked a series of questions regarding corporate culture. Following completion of a survey, the executives are asked to nominate organizations that “they most admire for having a corporate culture that has impacted performance” (Waterstone Human Capital, 2010a, p. 3). Nominated organizations are invited to submit an application for the corporate culture recognition program. There are five criteria for selecting “Canada’s 10 Most Admired Corporate Cultures.” These criteria include: “vision and leadership; cultural alignment; measurement and sustainability; rewards, recognition and innovative business achievement; corporate performance; and, corporate social responsibility” (Waterstone Human Capital, 2010a, p. 3).

According to the 2010 Canadian Corporate Culture Study Results Report (Waterstone Human Capital, 2010b), 77.3% of respondents measure their corporate culture. Overwhelmingly, 82.8% of respondents use employee surveys as the tool to measure their corporate culture. Also of interest to me is the perceived link between organizational culture and corporate performance.
According to the survey results, 38.9% of respondents perceive corporate culture to have a “strong, positive impact” on corporate performance, while 46.5% of respondents reported that corporate culture has a “very strong and positive impact” on corporate performance. Tseng’s (2010) study also supports this finding. Tseng’s research shows a positive relationship between organizational culture, organizational knowledge, and corporate performance.

In July 2010, I attended the Tenth International Conference on Knowledge, Culture, and Change in Organizations, held in Montreal, Quebec. As part of the conference program, delegates were allotted time for “talking circles,” opportunities to engage in dialogue with colleagues interested in like issues. I participated in the “organizational culture” talking circles. Over the course of the three-day conference, while speaking with academics from across the globe, I was struck by the realization that all of us seem to be struggling with concretely defining, understanding, and assessing organizational culture.

Based on the literature and my conversations with colleagues, I conclude that no single method for analyzing organizational culture stands out as being superior. Selecting an analytical strategy to unpack the culture in an organization requires an examination of the purpose of the study and the desired outcome of the research. Expertise is required in order to effectively conduct cultural audits that will be useful for the organization. I choose Schein’s three levels (“artifacts,” “espoused beliefs and values,” and ‘shared assumptions”) over the others because of the comprehensive, yet loose, nature of the levels.

**Section II: Workplace Learning**

Having defined organizational culture and its components, and the quantitative and qualitative tools that exist to explore culture, I now turn to the second focus of my literature review: workplace learning. I begin this section with a brief overview of the significance of workplace learning. Then, I describe three levels of learning that occur in the workplace: individual, group, and organization. Next I discuss three types of workplace learning: formal,
informal, and non-formal. Third, I outline aspects that are essential for a culture of learning: feedback and communication, opportunities for self-reflectivity, and respect for diversity. I then explore how theorists propose organizations create a culture of learning.

**The Significance of Workplace Learning**

Traditionally, work and learning have been delineated as separate and distinct concepts (Malcolm, Hodkinson, & Colley, 2003). Organizations did not subscribe to the notion that employees could and should be learning while working. Initiatives to build the skills and knowledge of individuals were focused on “training” activities that usually occurred offsite. These activities were tailored to improving specific skills for employees, relevant for limited aspects of the job (Schwind, Das, & Wagar, 1999; Sparks & Hirsch, 1997). New knowledge acquired through training did not easily transcend into other areas of work. Thus, this narrow view of workplace learning restricted the development opportunities for employees.

With the advent of the knowledge-based economy and a more global, competitive operating environment, organizations recognized the need to build their human capital in order to succeed (Edmondson, 2008). Workplace learning initiatives now encompass a variety of activities that enable personal and professional development for employees, both on and offsite (Hughes & Grant, 2007). While learning new ways of thinking and doing things, employees can also become more engaged in their work. A satisfied workforce helps to increase firm productivity (Towers Perrin, 2007).

Senge’s (1990) concept of ‘personal mastery’ supports the notion that individual learning in an organization is necessary for individuals to succeed and for the organization as a whole to remain competitive. Personal mastery involves constantly reshaping and redefining what is intrinsically valuable to an individual, while continually developing a new understanding and interpretation of reality. Personal mastery allows employees to grow as individuals, as they seek to find meaning in their work. Striving toward a clearly defined purpose and vision for one’s
work ensures continuous learning because it is a process, or a journey, of self-discovery. From an organizational perspective, employees who are engaged in personal mastery are desirable because they have initiative, an intrinsic sense of commitment to their work, and the ability to learn faster than their colleagues (Senge). Therefore, it is in the organization’s interest to help expand the skills and knowledge of its employees. Workplace learning helps to build a stronger and more capable workforce.

Research has increased in the area of workplace learning over the past decade (Fenwick, 2008). A pervasive theme in the literature is that learning is embedded within the work that people do (Glatthorn & Fox, 1996; Schein, 2004). A challenge associated with studying workplace learning is that it is difficult to determine both quantitatively and qualitatively the aspects of a person’s job that constitute work and those that are related to learning (Malcolm, Hodkinson, & Colley, 2003). Since knowledge is often socially constructed, individuals are constantly learning from each other, adopting new perspectives, acquiring new knowledge, and developing new skills and behaviours. Work and learning, therefore, are synergistic and coexist in a symbiotic relationship.

Learning in the workplace occurs at three levels: individual, group, and organization (Barker Scott, 2011). The focus of workplace learning has shifted from studying individual learning to exploring an organization’s collective skills and knowledge (Dixon, 1992; Senge, 1990). Instead of conceptualizing learning as a task isolated to individuals, organizations are interested in how the knowledge of employees fits into and allows for “systems thinking” or “organizational learning” (Barker Scott; Collinson & Cook, 2007; Fullan, 2008; Sparks & Hirsh, 1997). For example, Fenwick’s 2008 review of workplace learning articles reveals that much of the literature published in academic journals between 1999 and 2004 focused on the relationship between individual learning and how it facilitates the ability of the collective to learn.

Individual learning in an organization is often categorized as either formal or informal, and in some cases, non-formal. For the purposes of my research, I have chosen to focus on formal
and informal workplace learning. Though consensus has not fully been reached on the characteristics of informal and formal workplace learning, the Organisation for Economic Co-operation and Development (OECD) espouses that non-formal learning remains a term for which there is the least consensual definition (OECD, n.d.). In their attempt to define informal, formal, and non-formal learning through a review of literature, Malcolm, Hodkinson, and Colley (2003) could not find any discernable difference between informal and non-formal learning. They concluded that the term non-formal learning is redundant. In fact, the concept of non-formal workplace learning was not emphasized in the readings that I completed for my literature search. Further, I believe that the term ‘informal learning’ referred to in the sources that I read encompasses the notion of ‘non-formal learning.’

Definitions of formal and informal, and non-formal workplace learning abound. According to the OECD, formal learning activities are structured, planned, and organized, with intended learning objectives and outcomes. Examples of formal learning activities may include workshops, executive management programs, and professional development courses. Informal learning, often presented in contrast to formal learning (Erault, 2004; Malcolm, Hodkinson, & Colley, 2003), can be defined as the “unstructured transfer of work-related skills, knowledge and information, usually during work” (Hughes & Grant, 2007, p. 39). Coaching and mentoring are examples of informal learning activities. Non-formal learning, according to the OECD, “may occur at the initiative of the individual but also happens as a by-product of more organised activities, whether or not the activities themselves have learning objectives” (OECD, n.d.). These fluid definitions provide challenges for researchers interested in studying workplace learning. Instead of focusing on defining the terms ‘formal’ and ‘informal’ learning, Malcolm, Hodkinson, and Colley propose that emphasis should be placed on understanding the informal and formal attributes of workplace learning. They refer to process, context, purpose, and content attributes in their research. My research focuses on describing the various ways in which learning occurs in one organization.
Some literature (Edmondson, 2008; Fullan, 2008) recognizes that it is essential for organizations to build capacity by investing in their employees. According to Hughes and Campbell (2009), “Over 11 million Canadians receive some type of workplace training each year” (p. 24). Their study revealed that the number of hours of formal training provided per Canadian employee continues to decrease. In 2004, Canadian employees received 26 hours of formal training, in 2006, that number fell to 22 hours, and in 2008, the number of formal training hours received slipped to 20 (Hughes & Campbell). Individual characteristics seem to be indicators for workplace learning that is offered. Employee group, employment status, and employee age seem to impact the amount of training an individual receives. According to Hughes and Campbell’s study, middle managers are the employee group that receives the most formal training (62 hours), whereas the non-technical employee group receives the least amount of formal training (18 hours). In addition, Hughes and Campbell found that full-time employees receive more training (69%) than part-time (50%), or seasonal/contract employees (31%). Statistics show that the amount of training an employee receives increases with education, but decreases with age (Canadian Council on Learning, 2006).

Hughes and Campbell (2009) found that, for Canadians, the most popular learning activities include in-class (96%) and on-the-job (91%) training. Survey respondents, however, indicated that this training is often informal in nature. In 2008, 56% of survey respondents said that their learning was informal, whereas 44% indicated that their learning was formal. Interestingly, these figures are in contrast to the 2006 survey results, where 58% of respondents categorized their learning as formal, and 42% of respondents perceived their learning to be informal. Hughes and Campbell conclude that tracking and measuring employee learning in an organization is challenging. They argue that: “organizations may be increasingly viewing informal learning as a cost-effective, efficient alternative to some forms of traditional learning” (p. 31).
Organizational characteristics also seem to impact the learning opportunities that are available to employees. In Canada, large firms are defined as organizations with more than 500 employees and annual revenues greater than $50 million and authorization amounts greater than $1 million (SME Financing Data Initiative, 2008). Small and medium-sized enterprises (SMEs) include organizations with fewer than 500 employees, annual revenues of less than $50 million and authorization amounts less than $1 million. Results from a 2009 Conference Board study reveal that “small organizations were more likely to provide rich learning environments than were larger ones” (Hughes & Campbell, 2009, p. 12). In this instance, the Conference Board is referring to SMEs. This finding is particularly relevant to my research because H2L, by definition, is a SME. Of interest, too, is the finding that SMEs “spent more per employee on TLD [training, learning, and development] than did larger organizations” (p. 16).

Indeed, it appears as though researchers are keen on studying informal workplace learning. Part of the rationale behind an emphasis on understanding and studying informal workplace learning is grounded in the notion that all learning in the workplace involves aspects that are informal (Malcolm, Hodkinson, & Colley, 2003). Therefore, more work is being completed in this area in an effort to understand what informal workplace learning is and how it occurs. For example, studies on workplace learning reveal that participants equate learning with formal education and training; they are usually unaware that they are engaging in informal workplace learning (Erault, 2004; Hughes & Campbell, 2009). In addition, survey respondents have the tendency to relate learning to an experience. Since informal learning is sporadic and not defined by context or form, it is difficult to study and quantify. The invisibility of informal learning means organizations do not often track or measure its occurrences (Boud & Middleton, 2003).

Informal learning has several discernable characteristics. According to Marsick and Volpe (1999), informal learning is spontaneous and unconscious; it involves reflection, is sometimes triggered in response to a critical incident, is embedded in daily work, and is
connected with the learning of colleagues. In his study of informal workplace learning, Erault (2004) developed a typology to depict what is being learned informally in organizations. The skills and knowledge which Erault identified relate to categories including task and role performance, awareness and understanding, academic knowledge and skills, decision-making and problem solving, judgment, teamwork, personal development, and awareness and understanding (p. 265). An interesting finding of Erault’s is that learning is a function of social relationships. Activities most commonly related to learning are: participating in group activities, working with colleagues, dealing with challenging tasks, and managing client relationships. These findings are congruent with the literature that focuses on systems learning, such as communities of practice (Wenger, 1998). For Wenger, communities of practice are groups of individuals who share common skills, knowledge, and competencies.

Over two decades ago, Marsick (1988) suggested that organizations adopt a “new” paradigm of workplace learning. This paradigm encouraged organizations to frame their thinking of employee learning to include both the social aspects and personal characteristics that shape an individual’s learning in and through work. This more holistic understanding of workplace learning promoted learning through dialogue with colleagues, coaching and mentoring activities, opportunities for self-reflection, and a curriculum that is personally relevant and learner-centred. Through transformative learning experiences, employees would broaden their own skills and knowledge. Marsick argued that productivity would result because of these rewarding and enlightening learning experiences.

Current literature on workplace learning appears to be grounded in the Marsick’s paradigm. In addition to emphasizing informal learning, the literature encourages creating environmental conditions that allow for and support continuous learning and employee development. To support workplace learning, some research suggests that organizations create a culture of learning (e.g., Billett, 2001; Kumpulainen & Renshaw, 2007; Leithwood, 2002; Schein, 2004). While a universal definition of learning culture seems elusive, its main tenets include
opportunities for and systems that support continuous, collaborative learning, dialogue, and feedback. In addition, employees need time to reflect on their learning and resources to promote learning (Deal & Peterson, 2009; Garvin, 1993; Schein). A culture of learning results when learning is deeply embedded in the organizational culture (Schein).

**Components of a Culture of Learning**

In a culture of learning, organizational members, at all levels, must be committed to learning how to learn (Schein, 2004). This learning includes understanding and assessing the organization’s flexibility, adaptability, and responsiveness to changes in its external environment. It also means being aware of the internal relationships within the organization. In their qualitative study of four working groups in one organization, Boud and Middleton (2003) aimed to understand how informal learning could be used more effectively in organizations. They concluded that the context and nature of working groups influence individual learning. According to their study, individuals are interested in three broad categories of learning in an organization. First, employees seek to understand the internal organizational policies and procedures. Second, employees need to understand the internal working relationships in the organization to achieve personal success. Third, processes for solving dilemmas develop at the individual and group level, as problems emerge. The authors found that the development of learning contracts (either formally or informally) helps to guide employee learning. This study illuminates the importance of peer relationships and how individuals assign meaning to their work, learn new perspectives, and adopt new behaviours.

Feedback and communication are integral to individual learning in the workplace and are necessary if employees are to learn new ways of doing things and solving problems (Collinson & Cook, 2007; Schein, 2004). Coaching and mentoring are also important social components of informal learning. Mentoring, according to Diaz-Maggioli (2004), creates conditions for simultaneous learning for both parties involved in the relationship. Time and resources are
required in order to make this informal relationship an effective learning experience. Personal and professional development occurs in this dialectical relationship, as both mentor and mentee build self-confidence and self-esteem by learning from each other. Coaching, though similar to mentoring, differs in its structure and content. Hughes and Grant (2007) say that a key difference between coaching and mentoring, is that mentoring emphasizes knowledge transfer, whereas coaching focuses on developing knowledge and skills. Bowerman and Collins (1999) recommend that organizations create a coaching network because coaching facilitates a social relationship that allows “people to achieve insights, knowledge, skill, and satisfying outcomes in a democratic and off-line relationship” (p. 293). This understanding of coaching is a collegial relationship, one that somewhat removes hierarchy. A condition for a coaching network to optimally function is that a safe, collaborative environment must be created. The network is considered a community of practice, and allows for abstract and tacit knowledge to be transformed into concrete knowledge. As individuals learn new ways of thinking, they modify their behaviour as a result of this new knowledge. Behaviour change, as a result of learning, seems to be a prevalent theme in the workplace learning literature.

Self-reflectivity is an integral part of informal learning (Fullan, 2008). To understand and make sense of what they are learning, employees need time to reflect on their learning (Berg & Chyung, 2008; Lohman, 2005; Marsick, 1988). Knowles (1975) says that adult learners need to ensure that what they are learning is personally relevant and that, to some extent, they have control over the direction of what is learned. Knowles proposed that adults learn differently than children and thus unique strategies are required to effectively teach adults. Calling this new field of study ‘andragogy,’ Knowles (1984) laid the foundation for the development of adult education as a discipline of inquiry. Self-directed learning is paramount for adult learners. It is a process that allows individuals to assess their learning needs, set personal learning goals and objectives, and select the learning techniques that will enable learning outcomes. The literature on workplace
learning focuses on the notion that self-direction and self-reflectivity are intrinsic to employee learning (Leithwood, 2002; Marsick; Pool & Pool, 2007).

Embracing diversity is also essential in a learning culture; one of the tasks of a leader is to connect various subcultures together, facilitating employees “learn to value each other enough to learn from each other’s culture and language” (Schein, 2004, p. 401). Not only, then, are members impacted by the existing organizational culture, but they also have the ability to influence the organizational culture, especially when they learn new ways of doing things as they experience their own professional growth and development. Thus, culture facilitates the process of socialization.

Creating a Culture of Learning

Congruent with Schein’s (2004) research, Garvin, Edmondson, and Gino (2008) contend that, in order for learning to take place in an organization, three “building blocks,” are required. These building blocks include: “a supportive learning environment, concrete learning processes and practices, and leadership behaviour that provides reinforcement” (p. 110). A supportive learning environment ensures that an organization’s members feel a sense of “psychological safety,” where they can openly express their ideas and opinions without fear of making mistakes. They say that a learning culture appreciates differences, recognizes the contribution of diverse perspectives, is open to new ideas, and offers time for reflection (p. 111). The second building block, concrete learning processes and practices, includes the “generation, collection, and interpretation of information” (p. 111). Experimentation, mechanisms to monitor customer and technological trends, identification and solving of problems through interpretation and analysis, and education and training all facilitate concrete learning processes and practices (p. 111). Garvin, Edmondson, and Gino recommend that, in order to maximize learning in an organization, knowledge must be shared and diffused throughout the organization—among individuals and between groups. The third building block of the learning organization is leadership that reinforces
learning. Leaders have the authority to determine the individual learning that takes place in the organization; those leaders that are supportive of individual employee learning help to create the conditions necessary for workplace learning to occur. In other words, they promote a culture of learning.

Likewise, Billett (2001) identified four conditions that help to support employee learning. These conditions are: creating an environment that invites learning; matching individual learning goals with organizational needs; encouraging active participation in the learning process by both the learner and facilitator; and preparing coaches, mentors and learning facilitators with tools and resources to enable employee learning. Thus, this research emphasizes creating a learning culture to encourage employee development.

Recent research also seems to advocate the facets of a learning culture purported by Garvin, Edmonson, and Gino (2008) and Billet (2001). Leadership that supports learning, and a workplace environment that encourages learning, remain two key facets of a culture of learning. For example, Barclay (2010) contends that leadership and organizational culture are closely tied together. According to Barclay, “managers and people in leadership positions must take the time required to become more organizationally culture-centred” (p. 4). Megginson and Whitaker (2007) propose ways in which organizations can ensure the continuous professional development of their staff. From my perspective, what they are proposing is the cultivation of a culture of learning. For example, the authors suggest that organizations should clearly articulate learning goals and objectives. Learning must be an integral part of an employee’s work, rather than something that is considered extrinsic or a “burden” (p. 7). Megginson and Whitaker encourage regular, appropriate feedback between managers and employees, as well as opportunities for appraisal of employee performance reviews. They also recommend celebrating employee and organizational successes by acknowledging those who contributed to the success. Hughes and Campbell (2009) include organizational culture in the Learning and Performance Index. They suggest that an organization’s culture is linked to employee learning by cultivating innovation,
“encouraging employees to challenge the status quo and to share their successes as well as their failures in the spirit of continuous improvement” (p. 11), and fostering informal learning on an individual and team basis.

Schein (2004) refers to the concept of a “learning gene” (p. 395). He describes culture as the DNA of an organization. An organization that has a culture of learning, according to Schein, possesses a “learning gene,” or a deep commitment to learning that flows throughout the organization and is embedded within its operations. This means that employees, at all levels, are committed to learning, and view learning as intrinsically essential to their role. For Schein, a learning culture must “value reflection and experimentation, and must give its members the time and resources to do it” (p. 396). I have chosen to incorporate Schein’s learning gene concept into my discussion on a culture of learning because it seems like a comprehensive and pragmatic way to view the concept.

To facilitate the personal relevancy of workplace learning, individual goals should be aligned with those of the organization (Leithwood, 2002; Marsick & Volpe, 1999). An example of this goal alignment is found in Rampersad’s (2008) development of a Total Performance Scorecard. This tool encourages individuals, working groups, and organizations to articulate their vision, mission, and values. Combined, an action plan is created that matches individual and organizational goals to enhance personal learning and effectiveness. The “Plan-Do-Act-Cycle” (p. 51) is a model that facilitates the implementation of the scorecards. Employees are encouraged to take responsibility for massaging the direction of their work and learning. Rampersad proposes that by aligning personal, project, and organizational goals, continuous learning is encouraged in the organization. This research supports the notion that learning, for employees, is personally relevant when it is needs-driven and learner-centred.

An organization’s goal orientation impacts its ability to support employee learning. In their study, Nieuwenhuis and Van Woerkham (2007) outline four goal rationalities that are adopted by organizations. First, organizations can view learning as preparation for work. This
perspective focuses on separating work and learning, espousing that the purpose of learning is to increase an employee’s job-related skills. Training and formal education are the focus of employee learning. Second, organizations can potentially view learning as a source of increasing firm productivity and competitiveness. Organizations that adopt this framework see production of goods and services as a rational process, and learning as the “byproduct of work processes” (p. 71). Third, learning can occur for innovation. This goal is transformative because it promotes cognitive risk-taking, allowing employees to develop their skills. Organizational success results because of the innovative practices adopted. Fourth, the organization can foster lifelong learning. Personal development, including self-esteem and self-efficacy are emphasized in these workplaces. The writings of Nieuwenhuis and Van Woerkham complement that of Rampersad (2008); both articles suggest aligning individual goals with organizational goals in order to facilitate employee learning.

In summary, workplace learning initiatives help to build the skills and knowledge of individuals. The combined skills of group members enable organizational learning. Learning promotes innovative thinking, which, in turn, builds the human capacity of an organization. When learning is embedded in the organization’s culture, employees have opportunities for personal and professional development and are provided with the time, resources, and support structures to facilitate their learning.

**Conclusion**

My review of the literature on organizational culture began with a synthesis of organizational culture definitions. This review illustrated that the definition of organizational culture has evolved as scholars have added their own perspective to the concept. A prevalent theme threaded through the literature is that defining organizational culture is challenging because culture itself is abstract; it is not concrete and tangible. I contend that the definition of culture is less elusive than the literature suggests. Each of the early definitions of culture seemed
to contribute a new component to the concept of organizational culture. Recent definitions of culture, however, appear to be an aggregate of previous definitions. Thus, the definitions appear to be converging, sharing many common attributes.

Hofstede (2001) posits that, in general, definitions of organizational culture share six common themes. Organizational culture is (1) conceived of as a holistic concept, (2) influenced by history, (3) rooted in anthropology, (4) constructed socially, (5) malleable, and (6) difficult to change. Despite critics (e.g., Taras, Kirkman, & Steel, 2010), Hofstede’s work remains relevant.

Similarly, Schein (2009) espouses that organizational culture is deep, broad, and stable. Culture is both broad, because it encompasses the ways in which an organization (made up of employees) responds and adapts to internal and external environmental conditions, and deep, because it is embedded in both the conscious and unconscious cognitive and behavioural functions in the organization. Culture is formed during the process of socialization, as organizational members make meaning of their work and their own realities in the organization through interactions with and learning from one another. Culture is stable because it provides organizational members with a sense of meaning regarding the realities of their organization. I rely on these two summaries of organization culture; I believe that they provide a succinct overview of the themes revealed in my review of the literature on organizational culture definitions.

Thus, with help from the literature, I propose my own working definition of organizational culture. I define organizational culture as: the dominant values, thoughts, and beliefs that are shared amongst members of an organization. The shared values are reflected in observable and unobservable symbols, and perpetuated by interaction amongst members over time.

I next explored the elements constituting organizational culture. I structured this review around the argument that values are the driving force behind culture. I showed that an organization’s values, its culture, are reflected in and shaped by the operational environment. I
looked at the symbols that comprise culture, including the language, communication and knowledge management, stories and myths, organizational rites, rituals, ceremonies, heroes and heroines.

The exploration of definitions and elements of culture facilitated my review of the methodologies that exist to qualitatively and quantitatively unpack and describe organizational culture. I provided a discussion on emic (inside) and etic (outside) research studies that are conducted on organizational culture and looked at qualitative research strategies, including metaphors, interviews, and document analysis. I suggested that many qualitative organizational cultural studies are based on some type of analysis of the ‘levels of culture’ in a firm. I concluded this survey of methodologies by reviewing questionnaires, the predominant quantitative research strategy for exploring organizational culture. Based on my literature review, I argue that a qualitative research strategy is better suited to exploring the culture in an organization than is a quantitative strategy. A survey or questionnaire fails to adequately study the shared assumptions and values in an organization because it is prescriptive and limiting. The design of an organizational culture study must be aligned with the purpose and intent of the research. A qualitative approach to organizational culture provides an in-depth understanding of the nature and kinds of values that are shared within the firm based on the perception of the employees. Organizational culture, by definition, is emergent research because it continues to develop as changes occur in the internal and external organizational environments.

A clear avenue of future research is to develop more concrete metrics and tools for exploring organizational culture. Schein (2009) and Peterson and Deal (2009) provide guides to facilitate qualitative research. Schein (1985) and Hatch (1993) have provided models to document the processes that shape organizational culture. However, I contend that there are limited resources available to help interpret the data that are collected. As my review has shown, conducting an organizational culture study requires extensive training. My research proposes one
methodological approach to studying, analyzing, and interpreting a culture of learning in one organization.

I have revealed some key themes associated with workplace learning. The notion of workplace learning remains ambiguous. Increasingly, research in workplace learning focuses on informal aspects of learning. In part, this is because it has been determined that all learning includes attributes that are “informal.” Organizations have adopted a more holistic approach to employee learning, emphasizing both personal and professional development onsite and offsite. Embedding learning in work, and creating a culture that promotes continuous learning are important. Opportunities for feedback and communication, self-reflectivity, and a respect for diversity are some components of a culture of learning. Researchers are realizing the impact that learning has on an organization’s ability to compete in the global marketplace. In general, workplace learning is conceived of in terms of “systems thinking” and the role that the individual plays in allowing the collective to learn. Principles of adult learning and characteristics of adult learners are directly related to the literature on workplace learning.
CHAPTER 3

METHODOLOGY

This chapter discusses the qualitative methodology that I selected for my thesis research. First, I explain the purpose of my research and the theoretical framework that guided my study. I then list the key questions that underpinned my research. Next, I provide a rationale for selecting a qualitative research strategy to address these research questions. I conclude the chapter by outlining the processes that I followed to collect, code, and analyze my data.

Purpose

The purpose of my research is to describe and analyze one organization’s culture of learning. The organization I selected I identified as H2L. Expanding from the definition of ‘culture’ provided by Schein (1985, 1992, 2004), and with help from the literature, I define the learning culture of an organization to be the observable and unobservable processes, structures, norms, and communication patterns that support ongoing, work-related learning for organizational members (i.e., employees). In addition, I wanted to reveal how similar and different perspectives on learning are within the organization. I use the terms ‘learning culture’ and ‘culture of learning’ interchangeably in my writing. The purpose of my research is not to evaluate the learning culture at the organization, but rather to describe its components and attributes in-depth. I purposefully intended to base my description of the learning culture on a limited sample size (ten employees). Thus, my findings cannot, and should not, be generalized to the organization as a whole.
Methodology

My first task was to determine the key questions that I wanted to address in order to unpack the culture of learning in an organization. I created three research questions to help guide my study:

1. What are some of the employees’ assumptions about their work-related learning?
2. To what extent are these assumptions about work-related learning shared across the organization?
3. How are these assumptions supported by artifacts within the organization?

Qualitative Methodology Overview

To address the three research questions, I decided that it was necessary to gain an understanding of two different kinds of perspectives of individuals within an organization: the organizational (employer’s) perspective and the individual (employees’) perspectives. I first explored the organizational perspective by conducting semi-structured interviews with two H2L human resource (HR) representatives. Once I had an understanding of the overall organizational perspective, I conducted two focus groups with employees. I wanted to gain the perspectives on work-related learning from two different groups of employees in the organization. Based on conversations with my key HR contact, we determined that the two groups of employees best suited for my research were: 1) administrators and 2) frontline employees. Then, to probe if any shared assumptions regarding learning existed, I held semi-structured interviews with a sample of members from each of the two distinct employee groups in the organization. In all, then, the result of this multi-method research approach is a qualitative description of the learning culture within one organization.

Rationale for Qualitative Approach

Qualitative research, for Patton (2002), is concerned with how people make sense of the world around them; it allows for a holistic, contextualized analysis of a particular case. I
determined that a qualitative approach was ideally suited for my research because I was interested in providing an in-depth, or thick, description of the culture of learning in one organization.

According to Bogden and Biklen (1998), the goal of the qualitative researcher is to “better understand human behaviour and experience” (p. 38). Through my qualitative research, I aim to analyze how work-related learning is perceived by an organization’s employees as occurring within and being supported by their organization. A case study, I believe, is an appropriate research strategy to reveal the organization’s culture of learning. Further, according to Gall, Borg, and Gall (1996), case studies allow for understanding phenomena, as viewed and experienced by participants. Berg (2001) provides additional support for generating a case study; he believes that organizational case studies are useful for researching “relationships, behaviours, attitudes, motivators and stressors in organizational settings” (p. 233). As the purpose of my research is gleaning employees’ perspectives on their work-related learning, I deemed a case study to be an appropriate method to document and analyze my research findings.

Many examples of qualitative case studies exist within the literature on organizational culture and workplace learning. For example, Roberts and Wright (2007) carried out interviews to create a case study on the culture transformation at Farm Credit Canada. Lucas and Kline (2008) used semi-structured interviews, field notes, and document review in their analysis of the relationship between organizational culture and organizational learning in the case study of emergency medical services. Smollan and Sayers (2009) adopted a qualitative approach to their research on employees’ emotional reactions to organizational change. Through interviews, the researchers gleaned the employees’ reactions to organizational change initiatives. Recently, I stumbled upon Conklin’s (2010) research. Like my own study, Conklin explores organizational culture in a Canadian health care facility. He took an ethnographic approach to exploring change in one organization, combining participant observation with structured and semi-structured interviews, and document analysis to produce a case study. He then folded in his own field notes and reflections, to support his research findings. These four case study examples point to the
apparent appropriateness of a qualitative approach for studying organizational cultures and learning in an organization. Since I will be incorporating similar methods of inquiry in my study, these examples of recent research in my field support my rationale for selecting qualitative research.

**Multi-Method Qualitative Research Approach**

Grounded in my review of the literature on the ways in which organizational culture has been studied, I selected a multi-method qualitative research approach. After completing and defending my research proposal (July 21, 2009), I submitted it for university ethical clearance. This clearance was received on September 1, 2009 and a copy of the letter from the Queen’s General Research Ethics Board is included in Appendix A. The organization did not require additional ethical clearance.

**Organization selection.** I chose a non-profit organization in Eastern Ontario for the site of my research. H2L, my name for the organization, is a health care facility that offers educational resources and services to its clients and the community. Based on my initial review of its website, I selected H2L for my research when I discovered that learning is integral to its operations. Furthermore, the size of the organization (approximately 500 employees), its accessible location, available training and professional development programs, and interest in collaborating with me in my research were factors that solidified this organization as a viable case for my research.

When I initiated contact with the organization in early September 2009 (via e-mail), I provided the Executive Director with my research purpose and the strategy that I intended to implement in order to study H2L’s culture of learning. After reviewing my request, the Executive Director forwarded me to a contact in the human resources (HR) department. This contact agreed to facilitate my research and assist with logistical questions and concerns. I received an
introductory e-mail from my HR contact on October 21, 2009. I initiated the data collection immediately thereafter.

**Organizational perspective.** To glean the organizational perspective on the culture of learning at H2L, I conducted a two-phase research study. First, I met with two organizational representatives to hear their perspectives on the learning opportunities available to and in which employees participate in at H2L. Second, I obtained and analyzed copies of relevant organizational documents in order to gain a more in-depth understanding of the articulated ideologies regarding H2L’s workplace learning practices. These two phases of research—semi-structured interviews and document analysis—are next outlined.

**Individual interviews.** For the semi-structured interviews, I first met face-to-face with my HR contact at H2L. After a short e-mail exchange, I arranged a telephone conversation with my HR contact that took place on October 22, 2009. The purpose of this initial conversation was to provide a more detailed background on the scope of my research and the steps that I intended to follow in order to understand and describe the culture of learning at H2L. During this conversation, we confirmed an in-person meeting for November 5, 2009. I informed my contact that the aim of this meeting would be to ascertain some of the articulated goals of the organization with respect to employee professional development and work-related learning. I followed-up our telephone conversation with an e-mail that included a copy of my letter of information and consent form for my HR contract to read in preparation for our interview. A copy of the letter of information is included in Appendix B and a copy of the consent form is found in Appendix C.

On the recommendation of this HR contact, I then met with the individual responsible for tracking and measuring the ‘mandatory education’ that employees receive. Prior to our meeting, I provided this individual with a copy of my letter of information (Appendix B) and consent form (Appendix C) to read in preparation for our interview. As per the consent form, the participant agreed to have the interview audio recorded, in order to capture her comments verbatim.
Thus, I met with two organizational representatives in order to learn about the organization’s espoused beliefs and values regarding work-related learning at H2L, as well as the planned learning programs for the employees, and the resources that they have invested into employee learning. I deemed these individuals as representative of the ‘organizational perspective’ on H2L’s work-related learning because they are responsible, in part, for scheduling and monitoring the professional development of employees, maintaining a record of H2L’s policies and procedures, and are acutely aware of the organization’s structure. I recognize that additional representatives could have been included in the “organizational perspective” on H2L’s work-related learning; however, for the purpose and scope of this initial research, I contend that these two voices combined with my review of organizational documents provide sufficient data.

I used a semi-structured interview guide to help frame my sessions. Appendix D includes some examples of questions I posed during these sessions. I developed the interview questions with reference to Schein (2004, 2009), Deal and Peterson (2009), and Peterson and Deal (2009). To ensure that my questions were valid and addressed the research questions only, I consulted with my supervisor and together we massaged the interview guides so that they were clear and comprehensive. Prior to embarking on the semi-structured interviews, I field-tested and then revised the questions with my supervisor and one colleague. Each interview lasted approximately one hour. After completing the interviews, I then contacted the individuals via e-mail once more to allow them an opportunity to provide any additional feedback, thoughts, or reflections that they had on their comments shared during the sessions and how learning takes place in and is supported by H2L.

When possible, I invited open-ended responses to my questions. This was, as Glesne (1999) indicated, a way of gaining detailed and in-depth data from the participants. In particular, I was interested in hearing about: the kinds of learning opportunities available to H2L employees; H2L’s goals and targets regarding employee training, learning, and development; the kinds of resources H2L provides for its employees’ learning and development; the numbers of employees
who engaged in this learning; how employee professional development is tracked and measured at H2L; and how an employee finds out about work-related learning opportunities. Altogether, the data gathered from the two organizational representatives were used to unpack the organizational perspective regarding the culture of learning at H2L.

Semi-structured interviews, according to Glesne (1999), provide the opportunity to learn about the underlying beliefs and values held by participants. In relation to my research, the goal of the semi-structured interviews was to reveal the participants’ perspectives regarding the learning in their organization and to see how similar and/or different these perspectives were. Face-to-face interactions allowed me to probe the participants’ responses, when necessary, as Fontana and Frey (2000) have noted. I contend too that this probing also increased the trustworthiness of my data because I was able to ask questions to clarify what the participants said about their work-related learning. Comfortable surroundings encourage open, honest responses (Bogden & Biklin, 1998); accordingly, our interviews took place directly in the organization.

Document analysis. The HR contact gave me permission to review the organization’s documents, so that I could begin to understand their visible symbols, structures, and learn about policies that pertain to learning. Many of these tangible artifacts are available on H2L’s website, such as the organizational chart, organizational history, mission and vision statements, media releases, and annual reports. Additional documents included in my data collection are training, learning, and development policies; H2L newsletters for both clients and staff; ‘education request forms;’ evaluation forms distributed during training sessions; and a calendar indicating mandatory education. I also examined brochures that promoted the various services provided by H2L. According to Schein, artifacts such as these represent an organization’s espoused beliefs and values regarding work-related learning.

I collected and reviewed these artifacts throughout the research process to complement the espoused beliefs and values regarding learning elicited by the organizational representatives.
and two employee groups (administrators and frontline staff). Thus, this broader data collection allowed me to gain a greater understanding of the extent to which learning permeates the organization, where and how often it occurs, and whether it is formal or informal, individual or group.

**Employees’ perspectives.** I next investigated the employees’ perspectives regarding their organization’s learning culture. In order to select employees to participate in my study, I met with my HR contact for a second time. Together we agreed on two distinct employee groups for my research: administrators (employees in management roles) and frontline employees (those who deal directly with clients). My criteria for selecting participants were to interview employees who had been employed with organization for at least one year, held full-time employment, and had participated in some type of professional development activity or work-related learning during the past fiscal year.

**Administrators’ focus group.** My HR contact selected five individuals meeting my criteria to represent the administrators’ perspectives in a focus group. To facilitate my communication with these individuals, the HR representative initiated contact with these individuals, explained the purpose of my study, and invited their participation. I then followed-up by e-mail with all five employees individually, providing a personalized letter of information (Appendix E) and consent form (Appendix F). All five individuals initially agreed to participate in my study. To help protect the anonymity of my participants, I did not inform the HR representative of the names or number of employees who agreed to participate in my research. The first focus group took place on February 17, 2010. As per the consent form, the focus group was audio recorded. Unfortunately, due to competing demands and circumstances beyond my control, only two individuals were present in this focus group, which lasted approximately one hour.

**Frontline focus group.** My HR contact also put me in contact with a supervisor who oversees frontline employees at H2L. Through a series of e-mail exchanges, this individual gave
me a list of five employees appropriate for my frontline focus group. By initiating contact on my behalf, the HR representative and frontline supervisor facilitated my communication with employees. Moreover, the participants had neither access through the organization’s email system, nor did they have any direct telephone extensions or voicemail. Since I could not contact these individuals directly, I met with them individually at their workplace to provide them with letters of information and consent forms. The second focus group took place on February 18, 2010 and was also audio recorded. All five employees participated in this focus group, which lasted approximately one hour.

Sample questions posed in both focus groups include: What work-related learning options are available to you? What work-related learning activities have you participated in throughout the last fiscal year? How is your work-related learning supported by the organization? The data gathered during the focus group sessions were intended to provide some baseline information, and also to assist me in generating relevant questions for the next phase of my research process, which was to conduct semi-structured interviews with a sample from each of these two employee groups.

I contend two distinct groups of employees in my study were necessary so that I could better understand the assumptions and espoused beliefs and values held by these employees regarding their work-related learning. Not only did I try to obtain the “top-down” and “bottom-up” perspectives of the organization’s culture of learning, but I sought to ascertain whether these “bottom-up” perspectives of two different employee groups were similar or different.

I chose to use focus groups as starting points in my study; Greenbaum (1998) believes them to be a sound method to uncover how employees perceive their organization. Further, focus groups are beneficial because they are relatively low in cost and produce rich data regarding shared group experiences (Fontana & Frey, 2000). Krueger (1994) recommends that focus group sessions consist of no more than six to ten members; however, a smaller focus group was more feasible for my study. I purposefully constructed the focus groups to consist of members from the
same rank within the organization to eliminate any potential power tensions. The focus group sessions were meant to reveal the assumptions that employees have regarding their work-related learning. More specifically, the data from the focus groups were to help reveal Schein’s third level of culture, “shared assumptions,” resulting in themes being addressed, and revealing similarities and differences in perspectives.

As before, I developed the questions included in the focus group interview guides with guidance from Schein (2004, 2009) and Peterson and Deal (2009). I reviewed both of these texts in detail when preparing my interview guides and sought to create questions that would facilitate my understanding of the employees’ assumptions regarding work-related learning. I wanted the focus group conversations to explicitly address my first research question: What are some of the employees’ assumptions regarding work-related learning? I thought that by analyzing the multiple perspectives revealed by administrators and frontline employees during the focus groups, I would allow see how similar these assumptions are amongst these two employee groups within the organization.

After providing the focus group members with my definition of workplace learning, based on my reading, I wanted to know how most of their learning occurs and the extent to which the employees perceived learning to be supported by H2L. I then investigated what learning opportunities were available to the employees, who determines which learning activities are offered, and what activities employees would like to participate in but are currently unavailable. Next, I asked how employees learn about workplace learning opportunities and how the workplace learning is managed. Finally, I wanted to learn how individuals in the focus group support workplace learning at H2L. The interview guides for both focus groups were purposefully meant to be similar so that I could compare and contrast responses during my data analysis. One question did differ, however. It was: How do frontline employees perceive that the geographic location of their workplace (separate from the main location of H2L) impacted their workplace learning?
To enhance the validity and trustworthiness of the data collected during the focus groups, I invited one of my Master of Education colleagues to act as a moderator. Glesne (1999) suggested having an outsider involved. Prior to conducting the focus groups, I reviewed the focus group questions with my supervisor. I then field-tested the questions with my moderator and attempted to make her familiar with the organization, my research process, the purpose of the research, and any issues that might require clarification. Therefore, I believe that my focus group questions were created with rigour and detailed attention so as to illuminate the participants’ perceptions of their organization’s learning culture. To generate my interview questions and conduct quality interviews, I adhered to the guidelines prescribed by qualitative research experts such as Berg (2001), Glesne (1999), McMillan and Schumacher (2006), and Patton (2002).

Having a moderator in the room enabled me to manage audio recordings, take field notes, and make observations during the sessions. Following the sessions, I was able to obtain feedback from my colleague. We met after each focus group for a debriefing session, where we discussed our perspectives on the focus groups, the themes that emerged in the data, and the strengths and the weaknesses of the sessions. These field notes and reflective debriefing notes are part of data collection and inform my analysis.

To protect the anonymity of my participants, I saved my files in a secure location on my personal computer, files that I encrypted to enhance security. As a precautionary measure, my thesis files are also backed up on an external hard drive. Paper files are kept in a locked box that is marked “confidential.” I am the only person with access to these storage devices.

In total, then, I conducted two focus groups with seven employees: two in the administrator focus group and five in the frontline focus group. Appendix E includes the letter of information used for both groups of employees; Appendix F includes the consent form I used.

**Individual interviews.** To further probe the employees’ perspectives on learning, I conducted eight individual, semi-structured follow-up interviews. I specifically invited all employees in both focus groups to participate in an individual, semi-structured follow-up
interview. The purpose of these interviews was to glean a more thorough understanding and provide a thicker description (Geertz, 1977) of their perspectives of their work-related learning, H2L’s organizational culture, and the extent to which learning is embedded in the culture.

In April, 2010, I conducted separate interviews with both administrators who participated in the focus group. In the same month, I conducted two interviews with administrators who originally had agreed to participate in the focus group but could not attend. I followed the administrator focus group interview guide for the interviews with these two participants. In addition, I conducted individual interviews with three of the five frontline employees who participated in the frontline focus group. These interviews took place in July, 2010. I also conducted one interview with a non-focus group frontline employee. This interview took place in November, 2009, while I was still in the process of delineating my two employee groups. This employee was nominated by my HR contact, and I have decided to include her comments in my research because they complement those perspectives shared during the frontline focus group. I did not invite this participant to the frontline focus group; although she works with clients, she is in a separate department at H2L. The questions that helped to guide this interview are those that were posed during my organizational representative interviews (see Appendix D), as originally I thought that this participant would be one to represent the organizational perspective. The interview revealed clearly that this participant is, in fact, part of the frontline employee group.

In preparation for these interviews, I drafted interview guides and reviewed these with my supervisor to ensure that the questions were valid and clear. Per the consent forms, the interviews were audio recorded; during the interviews, I took field notes that helped to synthesize key points. As Janesick (2004) suggests, following each interview, I made reflective notes on the session, and included that data in my analysis chapter.

My research was emergent. As my research progressed, the interview guides became clearer and the questions even more refined. To create the individual interview guides, I followed the template that I had created for the focus groups. I wanted to ask many of the same questions
that were posed during the focus groups, in order to gain employees’ unique perspectives and then to ascertain how similar or different the employees’ perspectives would be on an individual basis.

When interviewing the administrators, I started with my definition of workplace learning (the same one that was given during the focus group). I then asked how these employees describe the organizational culture at H2L, how most of their learning occurs, if there is any formal follow-up when these employees engage in professional development, and their perspective on the extent to which H2L encourages learning. I asked about the learning opportunities available to these employees, the resources available to facilitate their learning, how they learn about workplace learning, and who decides what workplace learning opportunities are available. As well, I asked how these individuals support workplace learning, what other types of learning activities would be of interest to them to support their professional development, and how their workplace learning is managed. Since both of these employees are members of H2L’s education committee, I also asked about their role on that committee.

With regard to the frontline employee interviews, again, I attempted to ask questions similar to the focus group and to the administrator interviews. Additional questions that were posed to this group of employees, but not to the administrators, included: What factors encourage or hinder participation in workplace learning? How are new ideas implemented at H2L? I also asked about terms that were mentioned in the focus group, such as volunteer placements and collaborative partnerships with other departments, and how the geographic location of the frontline employees’ workplace (separate from the main location of H2L) impacts their learning. Appendix G includes examples of questions that were posed during the individual interviews and focus groups.

In summary, I conducted 12 interviews for my thesis research. Two interviews were with organization representatives to glean the organization’s perspective on its workplace learning. I held two focus groups: one focus group with administrators (two participants) and one focus
group with frontline employees (five participants). I then interviewed four administrators individually, two of whom participated in the focus group and two of whom wanted to participate in the focus group but could not. I next interviewed four frontline employees. Three of these employees participated in the focus group and one did not. Table 2 quantifies my participant contacts.

Table 2.

Data Collection Summary

<table>
<thead>
<tr>
<th>Organizational Perspective</th>
<th>Organizational Representatives</th>
<th>Focus Groups</th>
<th>Individual Interviews</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Employee Perspective</td>
<td>Administrators</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Frontline Employees</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>2</td>
<td>7</td>
<td>10</td>
</tr>
</tbody>
</table>

Transcriptions. After conducting the focus groups and individual interviews, I immediately saved the audio files on my computer. I then proceeded to transcribe each of the 12 interviews, a process that allowed me to become immersed in and intimate with my data. While transcribing the interviews, I kept a separate file with emerging themes, reflections, and questions to pursue. I was diligent with my transcribing and reread the completed typed transcriptions while listening to the interviews to ensure that I accurately captured the comments. In addition, I referred back to my field notes, when necessary, for clarification of comments. I elected not to member-check my transcriptions because I could not, realistically, communicate effectively with all individuals I interviewed, as not all employees have access to e-mail. By the time I had conducted the interviews, transcribed the data, and coded the data, I had listened to the interviews multiple times and made copious notes. Though I did not member-check my transcriptions, I am confident that I accurately capture participants’ comments.
Data Analysis

My next step was to code and analyze the data. I think that the following quote from Fendt and Sachs (2008) illustrates the complexity of this task.

"Qualitative inquiry, although essential in management and organizational research, is also difficult to do: It is about listening, watching, and asking, and about observing and sense making of situations, language, concepts, practices, beliefs and relationships. (p. 432)"

I now discuss the steps that I followed to analyze my data. I first describe how I organized my data. Then, I review my coding strategy, followed by how I interpreted the data.

Data Organization

To help me make sense of the data that I had collected, I followed LeCompte’s (2000) suggestions. First, I organized my data. I made a file with copies of my field notes and reflections. I created an inventory of my field notes and reflections. I then made a table which summarized the relevance of this data. That is, I briefly described each document and then cross referenced it to my methodology, and its relevance to the perspectives of employees. I retained original copies of the field notes and reflections in each participant’s paper and electronic file.

Next, I made an inventory of H2L documents to be analyzed. I assembled all of the documents that I had collected from the organization into one file. Then, I proceeded to appropriately label each file. In my files and transcripts, I refer to the organizational perspective as ORG and these individual interviews as O1 and O2. I refer to the administrators as ADM and these individual interviews as A1, A2, A3, and A4. Similarly, I refer to the frontline employees as FRNT and these individuals as F1, F2, F3, and F4. To further facilitate my data organization, I made two sets of tables. Appendix H includes my table summary table of key participant characteristics: the number of years an employee had been working at H2L, the current role held, other roles held, and the level of education held by each participant.
I then created a second set of tables. Using my literature review (Chapter 2) as a guide, I extracted the components of organizational culture that I found in the literature. When coding and analyzing my data, I wanted to know how participants described the organizational culture at H2L. I call these the ‘organizational culture components.’ I then went through my interview guides to extract the questions that I asked regarding workplace learning. I call these the ‘workplace learning components.’ Next, I created two tables—organizational culture components and workplace learning components—for the ORG, ADM, and FRNT groups. I also created these tables for the administrator focus group (ADM FG) and the frontline focus group (FRNT FG). In total, then, I completed eight summary tables to help analyze my data. Appendix I includes a table that summarizes the components of organizational culture and workplace learning that I explored for each group.

**Coding My Data**

I set out to create a systematic approach to analyze and interpret my qualitative data. My goal was to produce an in-depth description and analysis of H2L’s culture of learning. For Patton, (2002), this “thick, rich description provides the foundation for qualitative analysis and reporting” (p. 437). I chose “grounded theory” to inform my analysis strategy.

**Grounded theory.** Glasser and Strauss (1967) define grounded theory as “the discovery of theory from data” (p. 1). According to Ryan and Bernard (2000), grounded theory requires the researcher closely examining her data to tease out “richer concepts and models of how the phenomenon being studied really works” (p. 783). To do this, the researcher must closely review interviews that have been transcribed verbatim by looking at each line of text.

Grounded theory seemed to fit well with my research. For example, Martin and Turner (1986) suggest employing grounded theory to help analyze data pertaining to organizational cultures. They say that grounded theory facilitates data management and “can produce accounts of a corporate culture that are recognizable to the members of that corporation and may therefore
serve as a structure for discussions within the company on cultural themes” (p. 145). Moreover, Charmaz (2002) states that qualitative interviews are well-suited to grounded theory. “Grounded theory interviews are used to tell a collective story, not an individual tale told in a single interview” (p. 691). Since I sought to unpack the culture of learning at H2L from the perspective of employees, it seemed logical that grounded theory would be a viable tool for my analysis. Not only does grounded theory align with my methodological approach, it is flexible and allows for inductive analysis. According to Patton (2002), “Inductive analysis involves discovering patterns, themes, and categories in one’s data,” (p. 453, italics in the original). Ketokivi and Mantere (2010) are also proponents of inductive reasoning for organizational research.

**Coding phase I.** The first phase of my analysis included “open coding” (Patton, 2002). Miles and Huberman (1994) define codes as “tags or labels for assigning units of meaning to the descriptive or inferential information compiled during a study” (p. 56). First, I reviewed my 12 transcripts and fleshed out themes and patterns in the data. I began with the organizational perspective (O1 and O2), as these interviews were conducted first. Next, I analyzed the administrator perspective, as this corresponds most closely with the organizational perspective. I coded the administrator focus group, then each of the individual interviews (A1, A2, A3, and A4). Similarly, I then analyzed the frontline employee perspective. I coded the frontline employee focus group and then each of the individual interviews (F1, F2, F3, and F4). I assigned codes to the organizational cultural components and workplace learning components outlined in the tables I created to help organize my data. I also allowed for emergent codes that were revealed in the analysis process. As suggested by Ryan and Bernard (2000), I put these codes together to form a reference list of all the codes in my data. As I read and coded each transcript, I referred to my list of codes. Following LeCompte’s (2000) suggestions, I specifically looked for patterns in the data, such as frequency of comments, declaration, and omission. In addition, I looked for key words in context and was cognizant of word counts (i.e., words used most frequently). I relied on NVivo 8,
a software package specifically designed to analyze qualitative data, to code my transcriptions. Appendix J includes a detailed description of the codes that I developed.

After I was satisfied with my coding, I reviewed my field notes and reflections to identify, compare, and contrast patterns in the transcript data. To complement my analysis of my transcriptions, I followed a strategy similar to the one described above to review my field notes and reflections. These documents were meant to help confirm comments made by participants during the interviews. Wolcott (2001) contends that the qualitative researcher must sift through the data to find what are relevant. It was this “sifting” that occurred throughout my analysis. When using grounded theory to analyze my data, I was aware that concept saturation (Creswell, 1998) was key. Essentially, this means that to the same things are being said by multiple participants. Congruence in comments means that the phenomena under study is shared or understood similarly. The field notes and reflections were valuable sources of data because I was able to incorporate my own thoughts, reflections, and interpretation of the interviews throughout the research process into my findings.

**Coding phase II.** The second phase of my data analysis was selective or “focused coding” (Patton, 2002) to compare and contrast data. In particular, I was looking to see the similarities and differences between organizational perspective and employee perspective and administrator perspective and frontline employee perspective. The goal of this analysis was two-fold. That is, I wanted to answer the first two of my research questions: 1) What are some of the employees’ assumptions about their work-related learning? and 2) To what extent are these assumptions about work-related learning shared across the organization? This analysis was conducted in an effort to unpack the third level culture, underlying assumptions, posited by Schein (1985, 1992, 2004).

**Coding phase III.** The third phase of my analysis strategy was to review artifacts to unpack the organization’s espoused beliefs and values regarding work-related learning. To complement my analysis of my transcriptions, field notes, and reflections, I followed a similar
strategy with the artifacts I have collected. The goal of this analysis was to answer my third research question: How are employees’ assumptions about work-related learning supported by artifacts within the organization? This analysis aimed to fulfill two of Schein’s (1985, 1992, 2004) levels of culture. By reviewing the printed material, I set out to uncover the espoused beliefs and values of the organization (Level 2) in the artifacts (Level 1) produced by the organization.

**Interpreting My Data**

Patton (2002) describes data interpretation as:

> [G]oing beyond the descriptive data. Interpretation means attaching significance to what was found, making sense of findings, offering explanations, drawing conclusions, extrapolating lessons, making inferences, considering meanings, and otherwise imposing order on an unruly but surely patterned world. (p. 480)

After coding and analyzing all of my data, I synthesized my findings to complete the tables that I had created to help organize my data. I then quantified the main themes that I gleaned in each component of workplace learning and organizational culture. Chapter 4, my analysis chapter, focuses on describing the perspectives shared by the organization, administrators, and frontline employees with respect to the culture of learning at H2L.

**Summary**

My multi-method qualitative research strategy encompassing individual interviews with organizational representatives, the focus groups and individual interviews with administrators and frontline employees, and document analysis, results in what I consider to be a comprehensive methodology to unpack the culture of learning at H2L. Data triangulation enhances the validity and trustworthiness of my data (Mathison, 1988). For example, I triangulated the data collected during the individual interviews with the focus group data. In addition, I triangulated the data provided by HR representatives with that of the employees regarding the types of work-related
learning programs at H2L. Figure 1 helps to summarize my research methodology by illustrating the relationship between my three research questions, Schein’s (1985, 1992, 2004) levels of culture, and the data collection strategies that I employed.

*Figure 1. Mapping Schein’s (1985, 1992, 2004) Model to Research Questions and Data Collection*
CHAPTER 4

DATA ANALYSIS AND FINDINGS

The purpose of this chapter is two-fold. I begin this chapter with a detailed outline of how I analyzed my data. I then present my findings—a description and analysis of the culture of learning at H2L, based on the perspectives that I gleaned from the participants in my study.

Analysis Overview

This chapter draws on the 12 semi-structured interviews that I held with employees at H2L, documents that I collected throughout the research process, and my own field notes and reflections. The purpose of my research was to describe the culture of learning at H2L. Following Schein’s (1985, 2002, 2004) theoretical framework, I sought to explore the culture of learning at H2L by teasing out the “espoused beliefs and values” and the “underlying assumptions” regarding workplace learning. Reviewing organizational artifacts complemented my analysis. Below I describe in detail how I analyzed my data.

After conducting my interviews, I then transcribed the conversations verbatim. I transcribed the 12 interviews by carefully listening to my audio-recordings as I simultaneously documented the interviews. This was an onerous task. I often had to rewind and replay sections of the audio recording to ensure that I had captured the comments correctly. Once the transcriptions were typed, I then reviewed and edited the documents to ensure that I had accurately transcribed my data.

The next phase of my analysis process was to code the transcriptions. I developed codes based on facets of organizational culture that I extracted from my review of the literature and the questions that I posed during the interviews regarding workplace learning. NVivo 8, a software program specifically designed to manage qualitative data, facilitated my coding. Once I was
satisfied with my coding, I then ran reports on the 19 codes that contained data. Each of these reports provided me with a summary of participant comments, i.e., the number of comments made per participant, per code.

As my methodology chapter outlined, I created tables to help me record and succinctly display my data. Reading through each coding summary, I manually completed my summary tables. In total, I produced eight summary tables: four broad categories of interviews (ADM FG & FRNT FG, ORG, ADM, FRNT), and two tables per category (organizational culture and workplace learning).

I read through each of the eight tables to manually identify the key words that were revealed by participants within each facet of organizational culture and workplace learning. To further clarify my findings, I created two additional tables to quantify the number of times employees referred to a category: one table for organizational culture and one table for workplace learning.

I clarify with an example. One of my codes was ORGCONTEXT, which I defined as “factors that help to describe the context in which the organization operates.” Within this code, some examples of themes that emerged in my conversations with participants included “H2L as a long-service organization” and “deinstitutionalization as a determinant of structure.” Since participants independently cited these factors frequently, I deemed them to be shared assumptions regarding organizational context. I recorded these factors in my summative table on organizational culture.

As I reviewed my own notes, I discovered that, in some cases, coding overlapped. For example, within the ORGVALUES code (i.e., perceived values of the organization), I had included “H2L is bureaucratic” (a topic that in fact relates to the structure of the organization) and “Ministry funding determines learning” (a facet of organizational context). Using inductive analysis, I carefully analyzed my two summative tables (organizational culture and workplace
learning), sifting through the categories in each, until I believed that I had adequately aggregated the data and extracted the key findings.

I then reviewed H2L’s website and the documents that I collected from the organization. I also reviewed my field notes and reflections. Below, I present the findings that resulted from my data analysis.

**Findings**

Making sense of my data was a challenge. My qualitative methodology allowed me to be immersed in my data, resulting in what I consider to be a rich description and understanding of how learning is regarded and occurs at H2L. When I embarked on my research, I selected my methodology with the assumption that the role of an employee in an organization would help to predict the perspective on learning and culture. I hypothesized that three distinct perspectives on learning would emerge: the organizational perspective, administrator perspective, and frontline employee perspective. Having interviewed some employees, listened to the interview recordings, transcribed the interviews, and sifted through the data, I have come to the conclusion that the three perspectives actually overlap more than I had anticipated.

After much thought, reflection, and inductive analyses, I have elected to present my analysis based on themes revealed in the aggregated data. I acknowledge that while participants’ perspectives are rarely totally similar, some trends do emerge. To ensure validity of my data, I carefully extracted the predominant themes that emerged for each facet of organizational culture and work-related learning. I attempted to quantify these themes by counting the number of times participants referenced the theme. I then collapsed my data further and averaged the perspectives by employee group, allowing me to see how similar or different the perspectives are.

Again, I think it necessary to underscore that my findings are not and should not be generalized to the H2L organization as a whole. My sample size is too small to allow for generalization and this was never my intention. What I am presenting is a snapshot of H2L’s
culture of learning, taken from the perspectives of a select group of employees. As a novice researcher embarking on my first independent research project, I consider myself to be an amateur ‘photographer’ who assembled and arranged the participants for the photo. The ‘picture’ I describe below is my own interpretation of the perspectives revealed by a sample of H2L employees, supported by my analytic framework.

I have divided my analysis into two sections: organizational culture and workplace learning. Section I, organizational culture, includes an analysis of the organization’s context, values, and structure. I discuss the language, communication, and knowledge management at H2L. I next discuss how the culture at H2L facilitates employees’ socialization. I then present a description of some of the ceremonies and events that bring together H2L employees. I delineated some of these facets of organizational culture in my earlier review of the literature. My analysis does not include stories, myths, rituals, heroes, or heroines because these attributes of organizational culture were not discussed in my conversations with participants. Section II, workplace learning, includes a synthesis of the perspectives on work-related learning at H2L. I focus on the learning opportunities in which employees have engaged, both formal and informal, and the learning opportunities available to employees. I also discuss how learning is tracked within the organization and the perceived degree of organizational support for workplace learning. I then provide a synthesis of work-related learning opportunities that employees would like implemented at H2L going forward.

My analysis describes the culture of learning at H2L. I have woven the perspectives of my three groups—organizational representatives, administrators, and frontline employees—throughout my analysis to reveal how similar or different these perspectives are among and within the three different employee groups within the organization.
Section I: Organizational Culture

In the initial stages of my research, I found myself trying to piece together H2L’s core activities, values, and structure to help me contextualize the organization’s internal and external operating environment. Accordingly, I begin my analysis by describing key features of H2L’s context, its fundamental values, and the structure of the organization. I then discuss language that is specific to H2L, and the predominant forms of communication, and knowledge management. Finally, I describe how H2L’s organizational culture facilitates employees’ socialization.

Organizational Context

My three groups of employees held common views on H2L’s culture. Employees’ comments revealed that the context at H2L includes four factors: client community, employee long service, financial constraints, and deinstitutionalization. I describe each of these factors below.

Client community. According to its 2009-2010 Annual Report, H2L is an organization with approximately 500 employees, serving approximately 600 clients with developmental difficulties. The Ontario Ministry of Community and Social Services defines a developmental disability as “a disability that a person is born with or that begins before he or she turns 18” that “permanently limits a person's ability to learn” (Understanding Developmental Disabilities, a pamphlet distributed by H2L). The disability may range from mild to severe. The organization’s mission, as listed on its public website, emphasizes its ‘client-first’ values: “H2L is dedicated to supporting people with developmental disabilities and their families, responding to their evolving needs, respecting and advocating for their rights, and increasing their opportunities to have choices and make decisions.”

Through a variety of programs and initiatives offered at the main H2L location, within residential group homes, and the home share program within the community, H2L seeks to increase the independence of its clients. H2L’s programming is diverse, aiming to meet the
medical, emotional, social, and psychological needs of its clients. The ranges of clients who engage in H2L programming are diverse—people who are considered medically fragile, compromised individuals, or functional individuals with learning disabilities. The following sentiments expressed by one of the administrators help to illuminate how employees regard their work:

We take a lot of pride in the fact that we give people with developmental difficulties excellent care. In the community I think we are known to give very, very good care—excellent care—to our clients. Our clients are happy; our clients’ needs are responded to, and I think that we, as a group, take a lot of pride in that.

In my reflection notes following my initial visit to H2L, I wrote that I was “struck by the challenges that clients face in their day-to-day lives—physical and mental barriers, difficulty communicating, and expressing their emotions.” I was compelled to write a journal entry to express how overwhelmed with emotion I was upon seeing the clients and the work that H2L does. I realized then that the learning and personal growth which clients receive at H2L may not be available without H2L’s programs.

While this ‘client-first’ philosophy was a shared value, the degree to which employees mentioned client care in their responses differed by the role of the employee. To clarify, the more closely an employee works with clients, the more an employee is likely to include client care in his or her perspectives on H2L’s culture and learning.

**Long-service organization.** The majority of employees at H2L have been working at the organization for many years. The average number of years the participants in my study have been working at H2L is 15.30, with length of service ranging between one and 27 years. Collectively, frontline employees have an average of 21.75 years of service; organizational representatives have been working at H2L for an average of 16.50 years, and administrators average 8.50 years of employment. My statistics support the comments expressed by one organizational representative:
I would say the average length of service of most people that are here right now would be anywhere from 10 to 20 years, with many, many over that. Like, it’s a long service organization. We, in fact, joked at accreditation—we had accreditation surveyors here in October—and she said at our debriefing “I had one staff say to me, ‘If you last here a year, you’re here for life.’” It’s very true. People stay.

Another participant mentioned that this tendency for employees to remain at H2L is “a little unusual in social services.” When asked why they choose to stay working with H2L, employees overall believed that they are treated well.

**Financial constraints.** As a non-profit health-care facility, H2L receives funding from provincial ministries. The primary source of provincial funding is the Ontario Ministry of Community and Social Services. To maintain this funding, the organization must ensure that employees working directly with clients (the majority of H2L’s staff) remain competent in key skills and have necessary knowledge. This funding scheme is a factor that determines the learning opportunities available to and in which frontline employees engage. I will discuss this mandatory education in detail in Section II.

Employees from all three groups spoke about budget constraints and how this negatively impacts their learning. For example, one participant commented that in social service agencies “you’re always dealing with funding crisis after funding crisis.” Another frontline employee confirmed this financial concern.

We sometimes feel a little bit stymied, being at the end of the organization when it comes to coming up with new ideas or new experiences. We really feel the crunch of the dollar. If it’s going to either cost too much money, it’s not worth asking about, or if it’s not going to financially be beneficial for the organization, well perhaps they won’t be interested either. Money is a huge issue for the organization.

Four participants cited financial constraints as a reason why an employee would be denied an education request. Accessibility to technology was another example of how budget
concerns impact learning. Recently, H2L has made upgrading its technology a priority. It began upgrading its computer systems for administrators, and gradually installing computer systems in the other H2L locations. Frontline staff commented that technology is being slowly implemented, due to budget constraints, and they are not yet optimizing this learning avenue. Access to the Internet would, according to frontline employees, enhance their learning by enabling them to download materials for the programs they offer and search for information pertaining to client care online. Administrators, in general, also view the technology advancements as a positive step forward for H2L.

We’ve got 32 sites or something all together…Some sites are very isolated, but, now we are all connected. People can get stuff in real time. Instead of having to come here and pick up paper and take it to the group home, things can just be e-mailed so they can pick them up right away.

**Deinstitutionalization.** H2L has been providing services for over 60 years. The organization has transitioned its focus in response to its client community. As its 2008 annual report states, the organization began as a “sanatorium to treat tuberculosis patients” (p. 2) and evolved into a “hospital for chronic care patients, then later to a facility for children and adults with disabilities” (p. 2). In the 1990s, H2L decided to close its institutions and relocate clients and staff to residential group homes. Many of the current H2L employees were working at the organization during this period of restructuring. Later, employees were dispersed to different locations in the community. This organizational change was cited by many of the participants as a factor that has contributed to their feelings of isolation. For example, one frontline participant commented: “I have less of a sense that we’re all working together. I think because the organization has gotten bigger and different departments are in different physical buildings.”

Another frontline participant reiterated these feelings of isolation:

It’s easy for all the people in this building [main H2L location] to have a work community because we’re all here in the building a lot. When we have group homes that
are scattered throughout the city and in different places…it’s much more difficult for them to feel part of the group.

This perspective that deinstitutionalization has created communication barriers, was expressed clearly by another participant:

I know from previous focus groups and things we’ve been involved in that that [deinstitutionalization] was something that was pinpointed—people in the group homes do feel a little bit isolated because they only see set staff. Because we have clients coming in, we see group home staff members who are bringing them in on a daily basis. So you can get any news or things of importance passed a long and shared that way, early in the morning or at the end of the day.

In summary, my analysis revealed four shared assumptions regarding the organizational context at H2L: client community, employee long service, financial constraints, and deinstitutionalization.

Organizational Values

I referred to organizational artifacts in helping to decipher the values that H2L espouses. An examination of H2L’s public website, for example, revealed two types of organizational values: values related to clients and values that relate to staff. While the ‘client-first’ values were echoed in my conversations with employees, I conclude that values that the organization espouses for its staff do not translate in entirety to the employees. Below I discuss assumptions regarding H2L’s organizational values.

Client-centric values. H2L’s values are best characterized by providing “support, respect, and choice” for individuals with developmental disabilities. Frontline staff, having the most direct care relationship with clients, did allude to the values documented on the organization’s website. That is, H2L is committed to providing its clients with “individualized approaches to meeting their needs” that facilitate “involvement, social inclusion, and active

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participation in community life.” H2L further assists clients with their personal growth by cultivating “positive and productive relationships with others.” The organization strives to be responsive both to the needs of the individual and the community.

The 2009-2010 *Annual Mandatory Education Program Plan* underscores that “client safety is a priority at H2L” (p. 1). The mandatory education that staff receives annually is designed to maintain skill and knowledge competencies so that clients receive the highest quality of care. Frontline employees agree that H2L takes its commitment to clients seriously. The perspective of one frontline employee helps to summarize the shared assumption regarding the organization’s client-oriented values:

I think that the organization has the clients’ best interest at heart and is always progressing in that direction. And, I think we all have that same feeling. We feel well supported in that direction.

**Staff-centric values.** As an organization, H2L espouses that it actively supports, encourages, and facilitates work-related learning for its employees. Based on the conversations that I had with employees at H2L, I surmise that employees believe that learning is, supported *to a degree*, but not necessarily recognized or encouraged. I will explain this finding in more detail in Section II. What is essential to highlight is, while learning is not deeply embedded in the organizational culture, employees are, on average, satisfied at H2L.

We do all seem to be fairly well valued as people. We are well respected. On the employee end of it, we have excellent benefits. There seems to be a lot of concern, amongst different levels, and regard for the organization.

According to its public website, H2L professes that it is committed to: “supporting educational efforts through university partnerships and teaching agreements with educational institutions, fostering and applying innovative approaches in service, research, and teaching, and pursuing flexible and collaborative initiatives with community partners and government.” These
partnerships and initiatives, I discovered, are not as readily apparent to employees as the organization touts. One administrator commented:

I think we’re very insular, is what I find, coming from outside—hugely insular. Actually, when I got here I said: “Do I get any business cards?” I was told, “Oh yeah, don’t forget to remind me.” I’m thinking after three days, what do I need them for? I never leave. I never meet anybody from outside H2L. I’m always in the pod and I never go anywhere. My participants appear to perceive the ‘client-centric’ values espoused by H2L, but not necessarily the espoused ‘staff-centric’ values.

Organizational Structure

Three themes, and with differing degrees of agreement between employee perspectives, emerged to help describe H2L’s organizational structure: hierarchy, silos, and bureaucracy. I outline each below.

Hierarchy. The majority of administrators and frontline staff referred to their organization as a hierarchy. The vertical structure of H2L’s organizational chart depicts this hierarchy, with layers of management that report to the Executive Director. Indeed, conversations with employees led me to conclude that decisions are made at the top, and communication tickles “down the line” (a common phrase used by participants) to the various departments. One participant candidly shared her perspective on how H2L operates:

Regarding the way it [the organization] runs, I think that the management is very autocratic. The CEO runs things and that’s it and people need to accept that. So, that can limit some forms of creativity, I believe, in terms of thinking and trying things out.

However, it’s very efficient.

The organizational representatives, however, do not share this perspective. In stark contrast, one organizational representative commented:
Although it may look as though it’s a hierarchical delineation, that’s not necessarily how it is to be perceived or intended. You have all the employees who work in either supportive roles in terms of client care and employees who work directly with the clients. The folks who work directly with the clients are going to be generally residential counselors, community support workers, some of our PT [physiotherapy] and OT [occupational therapy] folks.

I contend, therefore, that the organization and employees have divergent views on the structure of H2L. The organization views H2L as a democratic entity, where employees have a voice in the decisions that are made, whereas employees perceive their organization to be hierarchical, with decisions and communication being top-down. Despite these differing views, it does appear that employees perceive the hierarchical structure to be effective, as reflected in one frontline employee’s comments:

I think, generally, things are done fairly effectively. I think it’s always a challenge for decision-making, the length of time items take to be decided and then actually to be taken upon them. It seems that the organization is a little heavy on the structure that way. Generally, though, I think it’s fairly effective.

I have chosen to include the above comment because I think that it reflects the shared assumptions employees espoused regarding the bureaucracy of H2L.

Silos. In addition to layers of management, the organization seems to have a siloed structure. More specifically, employees alluded to the fact that there are few partnerships between departments. Rather, each department is a separate unit. One administrator spoke about this departmental segregation:

Yes, it’s a very siloed organization. If you’re in residential, you know, you stick to your residential people. Silos are a big problem here. If you’re in finance, you’re in finance. My own interpretation of the H2L structure is that the silos represent communities of practice. The nature of the work that people do, and the geographic location of their offices, helps
to create pockets of employees who share similar roles and responsibilities. H2L has many locations within the community and a wide range of employees with diverse academic qualifications and professional experience. As a result, employees are both united and segregated by their common experiences and work.

**Bureaucracy.** Employees characterized H2L’s organizational structure as a bureaucracy. H2L has a plethora of policies and procedures in place that help to govern the employees’ code of behaviour and ethics. As one participant espoused:

> We have a policy for everything. All policies are approved by senior management and the CEO and; therefore, you cannot stick anything in there that you think is a good idea.

I reviewed four H2L policies to help me understand the organizational perspective on learning. The subjects of these policies included “employee development opportunities,” “job exchanges,” “mandatory education programs/tracking of mandatory education programs,” and “educational leave of absence.” These policies were selected for review because they pertain to work-related learning at H2L. According to employees there are “three thick binders” of polices and procedures. The collection of binders is located in each department. Employees must review polices annually by way of completing a “check list” to confirm that they have read the manual.

In general, it seems as though employees (both administrators and frontline) perceive these policies and the bureaucratic procedures that they generate as a hindrance to their work and learning. One administrator expressed her frustrations with the paperwork:

> When I’m sending out and asking people to come to videoconference sessions, it’s a lot of work and the supervisors find it a pain because they have to fill out forms in order to backfill a position. It’s easier to deny the request.

The participants’ comments describe a bureaucracy: paperwork, rules, procedures, a vertical and downward communication structure, and people not encouraged to communicate across units.
Language

During the administrator focus group and the frontline employee focus group, it was clear to me that H2L jargon is shared amongst staff. In many instances, employees would speak in acronyms that held meaning to them, but required clarification for individuals who are external to the organization, such as my moderator and myself. Appendix K includes a list of H2L terms that were cited most frequently by staff. As an organizational ‘outsider,’ I believe that the H2L employees have developed their own organization-specific language, which unites them with common terms of reference.

**Communication and knowledge management.** Communication in H2L flows “down the line,” while decisions travel “up the chain of command.” I have chosen to use these colloquialisms to help describe the communication at H2L; they are terms I heard in many of the conversations I had with employees. These terms reflect the hierarchical structure of H2L. The following quote from one administrator demonstrates H2L’s top-down communication:

> It’s [communication] kind of trickle down. We have our meeting, we share our information with the supervisors, the supervisors share relevant information with the frontline, such as upcoming events and educational opportunities, social events, client concerns, that kind of stuff.

Communication, it seems, is a source of frustration for both administrators and frontline staff. Since many frontline staff members have limited access to computers, most communication occurs through face-to-face meetings or by paper. Furthermore, many frontline staff members are shift workers. This work structure means that supervisors may hold meetings that not all of their staff can attend. As a result, administrators expressed frustration with the challenge to communicate critical information to their staff. For example, one administrator commented on how she repeatedly attempts to communicate information with her staff:

> That communication piece is absolutely huge. Especially with shift workers, you end up repeating and repeating and repeating and repeating and not really
remembering whom you told and whom you didn’t tell. So that whole piece of it I find really is an area that we need to look at.

Likewise, frontline staff members are frustrated with what they perceive to be weak communication links. One frontline employee described communication barriers:

And the trickle down thing, sometimes it’s the luck of the draw. If you happen to look on a bulletin board and see a memo that says there’s a workshop coming. I don’t think we always know in time, or at all, about all the workshops that go on.

The most common sources of information cited by participant groups were: The Link (an internal newsletter distributed to H2L staff), the Intranet (an internal staff website), meetings with supervisors and colleagues, and postings displayed in common areas. Frontline staff members said that accessibility to information was an issue. They said that they were somewhat marginalized because they do not have computer access, may not be able to attend meetings, and may not view postings in common areas. In fact, they referred to communication as “hit and miss.” Administrators, in contrast, have access to the Internet and are often members of professional associations and connected to networks. They receive information relevant to their work from agencies, ministries, and colleagues. Thus, the nature of one’s role at H2L appears to be a key factor that predicts learning.

A point that was raised in the administrator focus group, but not shared with organizational representatives or amongst all administrators, was that some frontline staff are illiterate. When H2L moved from an institutional paradigm to its current structure, staff members were grandfathered into the new organization. Many of these staff did not meet education standards of the current organization. Yet because they were union members, they were absorbed into the organization. Undoubtedly, illiteracy has an impact on the ability of staff to learn; it also affects the way in which information is communicated. Much of the information distributed by H2L is written. As one administrator commented, H2L is not responsive to the needs of these individuals:
So, you’re working with a population—they are 40%, I guess, of the employees residually who can’t read—and you keep attaching things to the pay stubs? They’re not going to get it. You keep sending stuff out by e-mail? They’re not going to get it.

I tentatively conclude that a mismatch exists between how effectively the organization perceives itself to be at communicating information to its staff and the extent to which staff are receiving the information.

Some knowledge sharing within the organization is done formally, such as the mandatory education sessions; however, the majority of knowledge sharing is informal. While the organization would like its employees to share information with each other after engaging in work-related learning, no formal expectations exist for them to do so, as illustrated in the following comment from a frontline employee:

They always encourage it and I’ve always been positive about sharing information. It’s not something that you keep secret. I haven’t anyway. Do they expect you to write anything down, like on a sheet to explain what you just took? No. There’s been no expectation that you’re going to write everything down and submit it someplace. I think that’s where you and your supervisors know each other and that you’re going to share that information.

I have reviewed the top-down communication at H2L, perceived communication, and access to information barriers. I now discuss how the organizational culture at H2L helps to socialize its employees.

**Socialization**

In my research, I revealed two components of organizational culture that facilitate employees’ socialization: rites and ceremonies. I discuss both of these components below.

**Rites.** Frontline employees and administrators referred to an organizational culture specific to H2L. As one administrator stated: “You learn the ‘H2L culture’, so that’s a whole
other piece of learning.” When probed, this administrator defined culture as “the way we do things around here.” After reviewing my data, I believe that two components characterize the H2L way. In general, employees perceive the culture of H2L to be somewhat akin to a “family,” where employees work together but are territorial. One senior administrator said that employees enjoy working at H2L for a number of reasons:

I think it’s a good job. I think that the pay is good, the benefits are very good; people are treated well. They like that it’s a family-oriented culture here. You’re all part of the H2L family. I mean people who have worked here have generations of family who have worked here. There’s now a third generation of people working here.

The description of H2L as a family culture was also evident in my conversations with frontline employees. This family culture is attributed, in part, to the fact that H2L is a long-service organization. As one frontline employee expressed: “I think as time goes on, it feels a little bit more like a family. You get to know people more and more, and get to know the clients more and more.” In fact, this notion of H2L as a family culture is not restricted to the interactions between staff, it transcends to the relationship with clients. As one administrator said:

A lot of our special occasions and events are melded with our clients because we consider H2L a home or a family to our clients.

Similarly, another administrator provided her own definition of the organizational culture at H2L:

Well, the ‘H2L Way’ has got to do with work culture. People who work at H2L, a lot of us have only worked in one place. I’ve worked in other places, but a lot of us have not worked in other places. They think that their way is the only way. When new people come in and they don’t understand the ‘H2L Way,’ they think it’s because the new person is stupid. It’s not because the ‘H2L Way’ is different than other ways; we all know what the ‘H2L Way’ is. So, yeah, that’s what I’m saying, it’s difficult for someone to break in. You have to have some tenacity to break into this group.
What this participant seems to be referring to is a rite of passage for new employees. Interestingly, the participant who has been employed with H2L for the shortest amount of time mentioned this period of initiation, which required learning the H2L explicit and implicit H2L rules. Employees who join H2L recognize that territorialism is not necessarily conducive to innovative thinking.

I think my coworker here has been here for 36 years. This was her first job out of college. There are a lot of people here like that. That’s a good thing in one respect, but you also need to have other experiences. You know when we do things one-way and I question it, people say: “Well, we’ve always done it that way!” Well, it’s ridiculous. It’s not the way it’s done anymore in the real world.

**Ceremonies.** When asked how learning is celebrated within the organization, the participants were in consensus that learning is not formally celebrated. While *The Link* helps to communicate information to employees, its focus is not directed at learning. Examples of H2L celebrations provided by employees are social events, such as a Christmas party, golf tournament, and activities coordinated by unions and committees. The “Quarter Century Club” is a congregation of individuals who have been employed with H2L for 25 years or more. New members are inducted into the club each year, again underscoring the fact that H2L is a long-service organization. All Quarter Century Club members are invited to a luncheon that celebrates their service and commitment to H2L.

**Summary**

This section has synthesized the perspectives that organizational representatives, administrators, and frontline employees revealed regarding components of organizational culture. My analysis began with a discussion on organizational context. I concluded that employees share assumptions regarding H2L’s client community, employee long service, financial constraints, and deinstitutionalization. I then distinguished two types of organizational values: client-centric
values and staff-centric values. I noted that the values espoused by the organization are not necessarily perceived as organizational values according to employees. Next, I delineated three factors that shape H2L’s organizational structure: hierarchy, silos, and bureaucracy. I then alluded to the jargon that is specific to H2L, followed by a review of the communication and knowledge management at H2L. I ascertained that communication at H2L is top-down and pinpointed some of the perceived communication challenges and information accessibility issues. Finally, I described some rites and ceremonies that contribute to the socialization process of employees to the “H2L way.”

Section II: Workplace Learning

In this section, I bring together the perspectives of my participants in order to provide a description of the culture of learning at H2L. I begin my description by discussing the structure of learning at H2L, outlining the five layers of learning that I uncovered in the organization: mandatory learning for all staff, learning that is exclusive to frontline staff, learning for regulated professionals, accreditation-driven learning, and learning that is non-mandatory. I then reveal some of the divergent attitudes between administrators and frontline employees towards non-mandated, formal learning. Next, I describe how employees perceive their work-related learning to be managed. I discuss employees’ perspectives on support for their workplace learning. I conclude my description with a discussion on some of the desired workplace learning initiatives that were mentioned in my conversations with employees. What follows is a detailed description and analysis of how work-related learning is embedded within the organizational culture at H2L.

Layers of Learning

My HR contact described learning at H2L as being “layered.” The following quote from my HR contact helps to describe how the organization views learning at H2L:

So, the best way to go through it is that the education is in layers. The first level of education are those things that are required to be held and given to all staff regardless of
their roles. Everyone from the housekeeping staff to residential counselor to clerk typist to the Executive Director is required to have fire and WHMIS [Workplace Hazardous Materials Information Systems] training. That’s a given, required by the Ministry and provided by the workplace annually. And then you move onto the different layers of education that’s required depending on the job class you’re in, based on the duties that are required.

The focus groups and individual interviews that I held enabled my participants to reflect on and deeply think about the learning that occurs at H2L, the culture of their organization, and the extent to which learning is embedded in that culture. As I spoke with the participants and probed to get to the core of the learning at H2L, I learned more about five different layers of learning at H2L: learning that is mandatory for all staff, learning that is mandatory for frontline staff only, learning that is specific to regulated professionals, accreditation-driven learning activities, and non-mandatory informal and formal learning for all levels of staff. These five areas of learning are layered upon each other, cemented together by the common purpose of improving the quality of care provided by H2L. I describe each of these five layers in detail below.

**Mandatory education: all staff.** As indicated in my discussion on organizational context, H2L receives most of its funding from the Ontario Ministry of Community and Social Services. To retain this funding, H2L must comply with regulations mandated by the ministry. Mandatory education activities, in which all staff must engage, include annual reviews of fire safety and Workplace Hazardous Materials Information Systems (WHMIS). H2L schedules these training sessions during business hours. While this learning ensures the safety of clients and employees, it does not necessarily contribute to the work that employees do.

**Mandatory education: frontline staff.** The next layer of mandatory education includes skills and knowledge required for employees who work directly with clients. The majority of H2L’s staff is classified as frontline employees (approximately 390 of 500 employees). This mandatory education is outlined in H2L’s *Mandatory Education Policy*. A Mandatory Education
Committee helps to oversee the scheduling of mandatory learning activities. Each year, a mandatory education planner is published. This document outlines the days in which employees may attend training sessions. Staff is compensated for their time; the training occurs during business hours. The following excerpt, taken from my interview with an organizational representative, provides examples of the mandatory education for frontline staff:

So, after fire and WHMIS we would move into things like abuse awareness, for example. Any staff working with clients has to have a basic understanding of training in abuse awareness…Then CPR and first aid, for example. Anyone working directly with clients has to have CPR and first aid. And we give that to the staff every two years. They are not required to take it externally. Staff who work in our community residences, or our day programs, where they would be driving clients, are given defensive driving. And that’s through an external agency, but we contract their services to provide that. We have something called CPI, which is Crisis Prevention Intervention training. And we have in-house trainers to do that. We have sent them to a train the trainer competency and that’s something that is recertified annually with our staff.

According to H2L’s *Annual Mandatory Education Program Plan* (2009-2010), frontline staff also received training in added skills. There are two levels of added skills. The first level of added skills encompasses added registered nursing skills. Examples of added nursing skills include “gastrostomy tube reinsertion, traceostomy tube reinsertion, emergency resuscitation and mic-key button reinsertion” (p. 1). The second level of added skills involves added residential counselor skills and other staff skills. Examples of these skills include “gastrostomy tube feeding, ventolin inhalation, epipen administration, nasal CPAP (constant positive airway pressure), glucometer training, point of care testing, urinary catheterization, jejunostomy tube feeding and mic-key (low profile tube feeding)” (p. 1).

During the frontline focus group and their individual interviews, staff expressed feelings of “dread” towards mandatory education. One frontline employee commented:
It doesn’t change a lot from year to year. It’s the same old thing. There’s always a test at the end. It’s just like doing it every year, it’s just another thing that you have to do. It’s not very interesting; it doesn’t change a lot form year to year.

While frontline employees are not necessarily keen to engage in the mandatory education annually, they do recognize its critical importance.

[Y]ou still need the mandated stuff and the refreshers. If you don’t take your first aid, and you need it, you need it. It’s good to have those things and refreshing your memory every year on the crisis prevention stuff. As much as we dread that, it’s something that you do use from time to time and it’s good to know and have it there in the back of your head.

Likewise, administrators and organizational representatives acknowledge that frontline employees dislike the mandatory education and continually strive to improve the format of the training to improve employee engagement in the essential learning.

**Learning required by regulated professionals.** Any regulated professional must adhere to the learning requirements and skill credentials of their respective college. Examples of regulated professions at H2L include nurses, psychologists, occupational therapists, and physiotherapists. Colleges external to H2L determine the learning requirements and credentials for these employees.

**Accreditation-driven learning activities.** H2L is an accredited organization. Accreditation is not a requirement for H2L; rather, it seeks to remain a best practice organization by complying with accreditation standards. One administrator referenced accreditation-driven learning opportunities at H2L. Examples of accreditation-driven learning opportunities cited by this participant include research to develop a pressure ulcer risk assessment guide, pain assessment tool, and a preventative dental policy. The following quote from an administrator describes the learning that occurred:

Because this population [H2L’s clients] is difficult to manage with the dentist, there’s usually sedation. I had the opportunity to look at preventative dental and draw up a policy
on that. So, we looked at prevention. We looked at the best way to manage this population. We looked at sedation. We looked at sedation and dental procedures. That was a whole huge thing. To understand dentists at all, it’s a whole different language. None of that was out there on a little chart. There was a lot of work involved…So, yeah, that would give me an opportunity to learn.

**Non-mandatory education.** The most diverse learning at H2L is what I call non-mandatory education. Frontline employees and administrators referred to a variety of learning activities in which they engage while on the job. While there are opportunities for formal learning at H2L, such as engaging in post-secondary education courses, videoconference sessions, or attending conferences, in general, much of the non-mandated learning that occurs at H2L is informal.

**Learning from colleagues.** During the frontline focus group and in the individual interviews, employees mentioned that they perceived relatively close ties with their colleagues because they had been working together for a long period of time. One frontline employee succinctly summed up the learning that occurs between colleagues:

We all know when somebody takes a course in something, who is good at what and who to go to if you need help with a certain question or a certain task you’re doing. You know who the best person to go to in the organization for that is. So, we all lean on each other quite a bit and learn from each other.

Because frontline employees have been working together for so long, they do not tend to mentor each other. One frontline employee contends:

I think we tend to mentor the junior people because we’ve been here for so long. There aren’t generally a lot of newer people except for new casuals that come in. Basically, as you sort of have found out, everyone who’s been here has been here for a long time.
This longevity has allowed frontline employees to develop a strong corporate memory. Accordingly, the frontline employees rely on each other to recall important aspects of the care they provide to clients:

I think also because we’ve been here for so long, someone’s going to remember that a client went through this, you know ten years ago, or fifteen years ago, and we share the information and it helps. It’s certainly helpful.

The administrator group, however, did refer to mentoring as an example of informal learning. Two of the administrators I interviewed joined H2L within the past three years. These participants spoke independently about the importance mentoring had on their assimilation to H2L. For example, one administrator commented: “For the first year that I was here, everything that I learned was from other people.” Another administrator noted:

When I started, there were—luckily for me—two other staff members that do the same job that I was expected to do. So, I was in their office every ten minutes saying: “What do I do with this? How do I do that?” And there’s a lot of that for sure at H2L.

These excerpts help to illuminate the informal learning that occurs at H2L. Meetings are another source of informal learning from colleagues. Administrators view meetings as an opportunity for information sharing with each other:

We have management meetings every two weeks—the three coordinators and our supervisor. We share information and keep everybody up to date. Every month we have team meetings. So it would be the three coordinators, all of their staff, the supervisors, and the coordinator. We all get together for our own department once a month. This is for information sharing. We talk about staffing issues, agency issues, challenges, and upcoming events.

Frontline employees view planning days (meetings with supervisors), as an opportunity to talk with their supervisors about the H2L programming:
We have planning days every couple of months. The supervisors are great and they go through each class. They ask: “…your cooking class, are you fine with it?” So, that’s our opportunity to say yes or no. If it’s no, usually the supervisor will say in advance: “Okay, planning days, is there anything that I need to know before we get there?” So, if you’re not planning on continuing the cooking class, she likes to know ahead of time so that we can be prepared for it on the planning day, exactly what’s going to happen, and who’s going to be involved, etc.

Committee membership is another conduit for frontline employees to learn from direct supervisors and senior management:

I have to say mostly from the __ program. I’m the only frontline committee member. Everybody else is of the senior management level. It’s interesting in that way, what I’m learning from them, and what they’re helping me to learn, and teach, and say. So, you know, it’s nice to take direction from them on better ways of saying things and preparing things.

Administrators also alluded to committee membership as a source of learning. A plethora of committees exist at H2L. During the administrator focus group, it was mentioned that often it is the same employees who belong to the committees, but hold different roles on each committee. Thus, committee membership was not viewed as an overtly positive source of learning for the administrators who participated in my study.

*Learning from clients.* Frontline employees cited learning from clients as an example of informal learning that is ongoing at H2L. The following quote from a frontline employee illustrates how clients help to teach frontline employees:

Introducing yourself to a new girl, for example, starting our program. You know that she’s hard of hearing. You know that she’s legally blind. Just getting to know her space. So, when you introduce yourself and you get a little bit closer, thinking she’s not seeing you, and all of a sudden she’s taking you and pushing you away. Okay. She just taught
me something. The clients are always teaching you about themselves as well. They teach you to become familiar with them and their needs. Clients are always changing.

**Teaching.** Teaching is an important aspect of informal learning at H2L. Generally, H2L relies on knowledge to be shared from supervisors to employees. As one administrator commented:

A lot of supervisor training the staff, I have to say that. It seems to me that every time I turn around, there’s another policy that says the supervisor will be responsible to implement.

Frontline employees are also teaching at H2L. They offer courses and learning sessions for their clients, such as woodworking, sewing, and scrapbooking. Some frontline staff members are also certified to teach courses to staff members, such as crisis prevention intervention or sign language.

**Divergent Attitudes towards Non-mandated Formal Learning**

While frontline employees and administrators provided similar examples of non-mandated informal work-related learning, their attitudes toward non-mandated formal learning opportunities were opposing. I think these divergent attitudes stem from the differing roles that these employees hold at H2L and their skills and knowledge required for their different work. In addition to roles, I think that perspectives on learning are shaped by individual values.

Conversations with frontline staff reveal that, in general, they are not keen on advancing their skills through formal education. The consensus amongst frontline staff is that, because they have been at the organization and working in the social services community for a long period of time, taking an extra course will not necessarily add to their skills. Rather, frontline employees prefer to learn informally by teaching and mentoring new staff, working with clients, and interacting with each other.
You know, when you’re in the field—I’ve been here, going on twenty-two years—I think if I was a new employee, a new staff, just starting out in the field, I think I would want to absorb everything. I’ve had my time. I’ve had learning opportunities. I’ve gone to conferences. So, at this time there’s nothing new for me at this point. It’s not to say that something won’t come up tomorrow, but there’s nothing outstanding that I feel I have to have.

Another frontline employee commented that she rarely peruses the H2L’s Intranet site. Her comment below complements the notion that frontline employees who have been working at H2L for many years conclude that they know what they need to in order to perform their role:

H2L has a website. I don’t know if all of the education stuff is on that because I haven’t really looked at it. I’ve worked here for a really long time so I know where to get things and I already know all that stuff. So, I don’t really need to look on the website. But, we do have a really nice website. I’ve looked at the cover page, at the home page. But, I don’t need to access that because I already know the things that I need to know.

Administrators are aware of the frontline employees’ attitudes toward learning. One administrator commented:

If you make them go to training things, they don’t like it. Mandatory training things? They don’t like being sent to things like that. It’s just the whole culture, I guess. You know? Let me do my job and leave me alone.

Indeed, when planning non-mandated workshops and activities, an organizational representative said that it is a challenge to get employees to attend. According to one organizational representative: “I’ll be honest with you. We usually have difficulty getting people to things, unless it’s something incredibly enticing.” Frontline employees are not willing to participate in learning activities unless they are being compensated for their time. One administrator candidly commented:
If you go out and do something innovative, nobody cares. So, why bother? That’s the whole thing. So, that’s why people don’t come in on their own time—there’s no incentive to do it. I don’t think that the incentives always need to be monetary.

Administrators (those who do not deal directly with clients) may choose to participate in non-mandatory training, learning, and professional development. Conferences, workshops, and post-secondary education courses are examples of learning cited by administrators. Based on the participants in my study, administrators are more likely to be new employees at H2L. To acquaint them to their roles, responsibilities, and the client population, new employees want to learn more about their profession and actively seek out learning opportunities. The work that the administrators do requires them to have formal knowledge of their profession; knowledge that is likely best gained through formal learning avenues. In addition, administrators are not participating in mandatory learning to the same extent as frontline employees. Consequently, they may have more flexibility with their schedule to allow for pursuing formal learning opportunities offered by outside agencies and associations.

Managing Workplace Learning

I now discuss how learning is managed in the organization. All three groups of employees—organizational representatives, administrators, and frontline employees—said that H2L formally tracks and monitors mandatory education, but has no formal tracking of non-mandatory education or informal learning. According to one organizational representative:

Our scheduling department is responsible for the tracking of education as well as the scheduling of employees to attend. And I actually have my own tracking that is sent to me by the scheduling department. What they will do is send out a package quarterly to all of the departmental supervisors indicating who has received the training, when they are due again, that type of thing. And this is a way of, a double-check; in case they’ve missed
anyone. It’s also a way for us to ensure that if someone has not received the training, they are not going to be called into work with clients if it’s something that they have to have.

A Mandatory Education Committee is in place at H2L. According to the *Annual Mandatory Education Program Plan* (2009-2010), the purpose of this committee is to: “plan, coordinate, monitor and report on Mandatory Education for all employees; to initiate, review and evaluate staff development, education and training options for employees” (p. 3). At one time, there was an “Enhanced Education Committee” with a mandate of developing non-mandatory education and learning opportunities for staff. However, this committee has since been disbanded.

Much like the siloed structure of the organization, the management of non-mandated learning appears somewhat siloed as well. As one administrator observed:

The thing is that education really goes up the individual line. So, Human Resources would be responsible for Human Resources education. Residential would be responsible for residential education. Accounting would be responsible for accounting education…

The Mandatory Education Committee is just taking care of what’s mandatory.

Specific H2L policies and procedures govern the activities of the Mandatory Education Committee. The organization contends that the policies acknowledge learning as a significant aspect of an employee’s development:

We have, through a couple of committees as well as policies, recognized that that [training] is an important component of employee growth and development. Within our education plan, we also have a number of programs that are available upon request. Now these have been developed based on surveys and evaluation forms that have been filled out by staff, requesting certain things. So at the end of the mandatory training, or at the end of other optional trainings we’ve done in the past, we’ll have an evaluation form and staff has an opportunity then to respond to other things that they think might be beneficial or receive training on.
Evaluation forms serve as a tool through which employees can provide their feedback on the training and learning that they receive. Organization-sponsored surveys are another opportunity for employees to provide comments.

A needs survey is done by the Education Committee and at all the mandatory trainings people fill out a survey saying: “is there anything else you’d like to see?” Which was how we did the bullying and how we’re doing the stress management. The Wellness Committee also sent out a survey. It will be, I guess about a year and a half ago…It asked if we did workshops, what would people like to see.

As a direct result of the evaluation forms and surveys, H2L sponsored workshops targeting the needs identified by employees. As one organizational representative commented, “We try to be very responsive to things that staff might put forward.” Examples of supplementary workshops include stress and time management, and dealing with an aging population. One administrator also mentioned: “infection control, behaviour management, medication, and pharmacology reviews” as H2L learning initiatives. These workshops were often offered following mandatory education training sessions.

Employees may also submit an education request to engage in work-related learning. This process requires completing a form, attaching information about the proposed learning activity, and then having the request proceed through the levels of management for approval.

With regard to education requests, one administrator shared her views:

[W]e have a lot of education that’s mandated. So people do have to spend a few days a year getting their mandatory education and training; a lot of those people aren’t interested in going to other things. I’d say, from the supervisors, our nurses and professional staff are more likely to ask for the trainings. And they are the ones too who are getting the flyers.

Annual performance reviews are a third option for employees to express their learning and professional development needs. Though there is not a formal learning plan for employees,
all participants in my study said that the performance reviews capture goals and objectives for the upcoming year. The performance reviews are designed to provide feedback on employees’ work; the focus is not on the progression of learning. The following quote from a frontline employee showcases the perceived informal nature of the performance reviews:

"Usually, too, when you have your performance appraisal, they ask you if there’s anything you want to do. Any course you want to take? If you express an interest, in you know courses to deal with the aging, because our population is aging, they usually say: “Yeah, go ahead, if you find anything out, let me know. If there’s anything you want to go to.” They’re very open about that.

To summarize, H2L formally tracks the mandatory education in which employees participate. The Mandatory Education Committee helps to oversee the scheduling of mandatory education. Evaluation forms, surveys, and performance appraisals are examples of tools to help manage work-related learning at H2L.

**Perspectives on Support for Workplace Learning**

I now discuss the perspectives espoused by organizational representatives, administrators, and frontline staff regarding the degree of support H2L provides for employees’ work-related learning.

Three of the four administrators I interviewed said that H2L does not strongly encourage its staff to engage in work-related learning. I have extracted quotes from each interview to demonstrate the perspectives these administrators hold regarding the support and encouragement they perceive for workplace learning at H2L:

Administrator: Encourages is a strong word. They don’t discourage learning, but they don’t actively promote it either. I’ll be honest, the opportunities that I’ve taken, H2L has supported me 100% of the way.
Administrator: I think they like to tout, as __ says, that they encourage learning. But when it really comes down to it, it’s difficult to get funding. It’s difficult to backfill for staff. We also have this mandatory learning, which they are going to hammer into my head until I’m dead (and I’m not stupid, I got it the first time, I don’t need it every year). But then opportunities to make you more knowledgeable and more engaged in your work, those aren’t there or supported.

Administrator: It’s very old-fashioned thinking here. If you….I’m searching for words because your performance review is out of whack. You can’t go anywhere. People get capped at the top of their position. So their performance reviews don’t have a whole lot of merit. It’s like you are doing the same thing and you’re like a robot. You don’t get a pay increase. Education is not part of that fold.

In contrast, the fourth administrator expressed a positive perspective on the degree of support H2L provides for its employees work-related learning. This administrator is part of the senior management group. Perhaps this participant’s perspective is a function of her senior role at H2L.

All frontline employees concluded that H2L is a supportive when they request work-related learning opportunities. A typical response from this group of employees is:

I don’t think very many people get turned down. If you want to go see something on autism, that’s a no brainer, of course we’ll allow staff to go do that. There is staff here at H2L that don’t work directly with clients. They do pick and choose what you can or should attend, depending upon what your position is. I’ve worked here for __ years and I’ve never had anyone tell me “no” to go to anything educational. I’ve gone to sign language classes; we’re taking French classes now. I don’t find it’s a difficulty at all.

They do, however, acknowledge that funding is often an inhibiting factor and a reason why their education request may be denied, as revealed by this quote.
I would think the only limitation to that, for my particular department, would be funds.

So if there’s no money left at the end of the year that would be the only reason why you couldn’t attend something.

As one frontline employee summarized: “If it’s within reason, within means, H2L can be very supportive.” I conclude that administrators, in general, feel that H2L supports, but does not encourage their work-related learning. Frontline staff, in general, thinks that their learning is supported by H2L. When discussing these perspectives, it is necessary to recall that frontline staff are not usually the employees requesting non-mandatory learning events. Their attitude is one of complacency; they are satisfied with learning informally from colleagues and clients and attending the mandatory trainings provided by H2L. Conversely, administrators more readily seek out learning opportunities that will enhance their knowledge base and improve their skills on the job. Again, work-related learning is a function of one’s role at H2L.

H2L also provides resources to complement the learning in which employees engage. When I was holding interviews in H2L, I observed examples of resources available to staff. For example, employee rights and responsibilities, and the H2L code of ethics are clearly displayed on the wall. Binders containing organizational information, such as occupational health and safety procedures, operating plan, H2L emergency and pandemic plans, policies, and procedures are stored on shelves in the boardroom. One administrator espoused:

We do have resources. We have more resources than other agencies and there is a great camaraderie and people all know each other. So, there’re a lot of really big pluses.

**Desired Workplace Learning Initiatives**

Frontline employees and administrators provided direction and feedback regarding types of workplace learning that they would like to see implemented at H2L. Four themes emerged from the data: promotion of professional practice, increased partnerships between departments
and other agencies, enhanced opportunities for information sharing, and access to technology for frontline employees. I expand on each below.

**Promotion of professional practice.** Employees are seeking more opportunities to expand their skills and greater recognition of their learning. According to one administrator, the promotion of professional practice would lead to more discussion amongst employees, allowing for communication and knowledge sharing:

> I really would like to see some promotion of professional practice. That means an active support of professional development. I would love to see something like a professional practice council, where the professionals could sit and solve some of the professional issues that are going on. I would very much like to see more support for research and development. I think we have grand expertise here, and we don’t have the science-based evidence to back it up. I mean you can do it if you want to do it yourself, but there’s no organizational recognition of that expertise. On one hand, we kept the professionals when we closed the institutions, but we’re not keeping the knowledge that’s been developed. Another administrator similarly commented that she would like to see learning more deeply embedded and overtly emphasized in the organization’s values:

> It would mean part of performance reviews, that you would be encouraged to go to conferences, there would be open forums to share what you learn when you go to conference, ensure that you’re instilling best practices in your staff.

One particularly vocal participant, an administrator, is keen to see H2L develop more formal opportunities to recognize and celebrate the learning in which employees engage. When this employee completed her master’s degree however, she believed that her accomplishment was not celebrated by the organization. Though the employee earned her degree for herself, and not for work-related reasons, she was discouraged that the “silence was deafening” when she told people of her education.
One frontline employee acknowledged that she would like to have more opportunities to enhance her skills and knowledge. My conversations at H2L led me to conclude that learning opportunities for frontline staff are focused on ensuring that mandatory education is complete and up-to-date. Beyond these required work-related learning initiatives, staff may engage in optional workshops and learning opportunities. Frontline staff, in general, are not keen to take courses and workshops outside of their regular business hours. Instead of seeking out learning opportunities in the community, they expect H2L to offer training in-house:

There are a lot of outside agencies, which continue to move forward in the field. A lot of my initial training, my initial college degree, was back in ’79. Things have really progressed in the field since then. New techniques, new ways of seeing the clients, or learning how they learn, there’s been new developments in how the brain works in certain disabilities, and that type of thing. We haven’t, as staff, been able to keep up with that type of training because it’s just not made available to us.

**Partnerships.** Some employees suggested that their learning would be enhanced through increased partnerships with other agencies similar to H2L and increased partnerships between departments at H2L. For example:

It would be good to know how other organizations work in the community...Some of the things that we’ve found interesting are the standards of care that have been different in other organizations. It gives you a basis for comparison. Different things like how their staff is trained or what type of training they expect from their staff.

Employees (all groups) proposed enhancing channels of communication at H2L and thereby helping to break down silos. The following quote from a frontline employee is one proposal to facilitate departmental collaboration and cross training:

I frequently have to call physio up for help with a client. If there could be something in the way of mentoring program somewhat, I don’t know what kind of basis that would be possible, but to learn techniques to use with people who have physical handicaps that
type of thing would be useful to me because a lot of our clients do have physical handicaps and are recovering from surgeries or whatever. It would be nice to have a general idea of things we can do with them to help make their life easier and make them better able to move.

**Information sharing.** Frontline employees and administrators expressed an interest in creating more opportunities to share information amongst colleagues. While information is often shared informally, they said that they would have liked to have more formal opportunities to discuss staff and client issues. One frontline staff member suggested implementing opportunities for formal debriefing with colleagues following conference attendance. This debriefing could be a short presentation over the noon hour or a presentation incorporated into a staff meeting. One administrator said that more H2L-sponsored learning sessions offered over the lunch hour would be helpful. Indeed, creating partnerships with other agencies and between departments at H2L would necessarily result in opportunities for information sharing. As one administrator noted, fostering a sense of team is an important component to creating and maintaining a positive work environment:

Information sharing. I want to see staff development, but I really believe that we are a team; that in the nursing homes, the residential counselors are a team. You can’t be a team if you never meet.

**Access to technology.** During the frontline focus group in particular, and the individual interviews I held with frontline staff more specifically, a desire for increased access to technology was a prevalent theme. Frontline staff not at the main H2L location currently have limited access to computers and videoconferencing technology. Limited access to technological tools is a hindrance for learning, according to the frontline staff with whom I spoke. Though a computer has arrived at the offsite location, it is not in a centralized area and not all staff members access the computer regularly. One frontline participant suggested that regular computer access would allow staff to be more aware of learning opportunities that are available to them:
To be made aware of besides happening to stop by the bulletin board and see a posting. To be made aware of it. That’s where I think computers would come into use. So that anyone could fire up the computer and see this is what is coming up now and we’d have time to do it.

At the time of my interviews, frontline staff had not yet been trained on how to use the computer in their workplace. According to one frontline employee, without training, staff members said they feel somewhat apprehensive about using the computer:

Nobody’s had a lesson on it, so everybody’s all fingers and thumbs, kind of thing. Unless you already know anything about the computer, and how to get to certain sites, then you’re scared that you’re going to mess something up.

To further complement their learning, frontline staff at the offsite location would like to engage in videoconferences that occur at the main H2L location. Staff currently perceives barriers to attending videoconferences. Frontline staff may not receive enough advanced notice to attend the videoconference, the videoconference content may not be relevant to frontline staff, or the videoconference may occur during the day when it is difficult to ensure that sufficient staff members are in the building to cover absences. One frontline staff member provided a summary of the perceived challenges regarding participation in videoconferences:

The geography. It’s again somewhat difficult to leave the building. The building does somewhat hinder us. We’re sort of here from eight to four and we’re limited staff-wise, so getting away for a teleconferencing thing…When we don’t have anything like the equipment so we could participate in it, in the building, we’d have to go over to H2L to participate, I would assume. A lot of the teleconferencing things haven’t really been geared to our level. Something they would say: “You should go see or take part in it.” It’s been higher levels, doctor-oriented, that type of thing, from what we understand. We also don’t get a lot of information on them either.
Thus, employees would like H2L to implement the promotion of professional practice, have increased partnerships with agencies and across departments, have more opportunities for information sharing, and continue to increase access to technology.

**Summary**

I uncovered five layers of learning at H2L: learning that is mandatory for all staff, learning that is mandatory for frontline staff only, learning that is specific to regulated professionals, accreditation-driven learning activities, and non-mandatory informal and formal learning for all levels of staff. Non-mandated informal learning appears predominant at H2L. I delineated three categories of informal learning: from colleagues, clients, and teaching. While frontline employees and administrators provided similar examples of non-mandated informal work-related learning, their attitudes toward non-mandated formal learning opportunities were opposing. I contend that these divergent attitudes stem from the differing roles that these employees hold at H2L and the skills and knowledge that are required for the work that the two groups of employees do.

After discussing employees’ perspectives on the workplace learning that occurs at H2L, I explained how learning is managed. I outlined that mandatory education is centrally tracked and measured by H2L. Employees and their direct managers track and monitor individual learning that is non-mandatory. Examples of initiatives to help monitor learning were cited, including the Mandatory Education Committee, organizational policies and procedures, evaluation forms, surveys, and performance appraisals.

I next described how perspectives on the support for workplace learning at H2L differ. In general, administrators contend that H2L supports but does not actively encourage their learning. Frontline employees are satisfied with the support they receive for their work-related learning. Perspectives on support for workplace learning seem to be a function of one’s role at H2L.
To complete my description of learning at H2L, I outlined four types of workplace learning that employees desire: promotion of professional practice, increased partnerships between departments and other agencies, enhanced opportunities for information sharing, and access to technology for frontline employees.

In summary, I used a three-pronged approach to study the culture of learning at H2L, following Schein’s (1985, 1992, 2004) levels of culture theory. One, I explored the “espoused beliefs and values” of the organization by speaking with two organizational representatives. Two, I reviewed documents produced by H2L that relate to workplace learning. Schein calls these documents “artifacts.” Three, I spoke with two separate employee groups in the organization—administrators and frontline employees—to tease out shared assumptions regarding the organizational culture and workplace learning at H2L. Together, my discussions of the organizational culture and workplace learning at H2L provide a descriptive analysis of the culture of learning at H2L. That is, a description of employees’ perceptions on the culture of their organization, how learning is regarded by, and occurs in H2L.

In the following final chapter, I answer my three research questions, draw some conclusions, and propose recommendations for H2L to enhance its culture of learning.
CHAPTER 5

CONCLUSIONS

In this final chapter, I present the conclusions of my research. I begin by summarizing the purpose of my research. I then draw conclusions based on my findings. I frame my conclusions around the three questions that I addressed in my qualitative research. Next I propose some recommendations on how I think that the organization, H2L, can embed learning more deeply into its organizational culture. I complete the chapter with what I consider to be the significance and limitations of my work and provide suggestions for further research.

Restatement of Research Purpose

I embarked on my research with the underlying premise that learning in an organization is essential. The purpose of my research was to describe and analyze one organization’s culture of learning. Based on my reading of the literature, my working definition of a culture of learning of an organization as the observable and unobservable processes, structures, and norms that support ongoing, work-related learning for employees. I chose a medium-sized, non-profit organization in Eastern Ontario (referred to as H2L) as the site for my research. By speaking with individuals from three employee groups at H2L—organizational representatives, administrators, and frontline employees—I believed that I would glean perspectives on how learning is regarded by, occurs in, and is supported by the organization. In particular, I sought to determine how closely aligned these perspectives on learning are amongst and within employee groups. Based on the perspectives of a select group of employees, the result of my research is a descriptive case study and analysis of the culture of learning at H2L.
Response to Research Questions

My conclusions are framed around my three research questions:

1. What are some of the employees’ assumptions about their work-related learning?
2. To what extent are these assumptions about work-related learning shared across the organization?
3. How are these assumptions supported by artifacts within the organization?

Below, using aggregated data, I respond to these questions. I then provide my thoughts on Schein’s model, the theoretical framework that underpinned my study, and discuss the subcultures of learning I revealed at H2L.

First Research Question

*What are some of the employees’ assumptions about their work-related learning?*

Four themes regarding work-related learning seemed to prevail in my conversations with employees. First, learning at H2L is best described as being “layered.” Second, employees acknowledge that H2L could enhance its workplace learning. Third, communication barriers impede workplace learning. Fourth, administrators and frontline employees have opposing perspectives on their workplace learning. I elaborate on these findings below.

I have chosen to describe learning at H2L as being layered. I relied on this analogy because it was a descriptor that my key HR contact used in our conversations. In my conversations with employees, I revealed five layers of learning that can be ongoing simultaneously by staff at H2L. As outlined in detail in Chapter 4, the five layers of learning at H2L are as follows:

1. Mandatory Education: All Staff
2. Mandatory Education: Frontline Staff Only
3. Learning Required by Regulated Professionals (such as nurses, psychologists, etc.)
4. Accreditation-driven Learning Activities (particularly for administrators)
5. Non-Mandatory Learning (including both formal and informal learning)

The predominant form of formal education that occurs at H2L is mandated by the Ministry of Community and Social Services so that H2L can maintain its provincial funding. This mandatory education includes skills-based learning that staff responsible for directly managing the care of clients must have in order to perform their work. However, much learning occurs informally at H2L. My participants spoke about their learning from colleagues, clients, and their own teaching. This quote, from one frontline staff, sums up the perspectives I heard from employees regarding their learning:

I think informally I’m learning, if not every day, then very regularly. Working with clients, I’m learning almost daily. Formally, I guess several times a year with workshops and mandatory courses and re-certifications. So, formally it’s several times a year.

Administrators and frontline employees suggested that, moving forward, H2L could strive to enhance the workplace learning activities that are available to employees. Moreover, the organization could increase the extent to which these learning activities are promoted, and more actively encourage staff to participate in learning. What I heard from the participant employees, particularly the administrators, is that they think that H2L supports their workplace learning, but does not necessarily actively promote or encourage non-mandatory education. In essence, participants think that H2L could put more emphasis on work-related learning, beyond the mandatory education in which employees must engage.

For example, to engage in formal workplace learning, employees must submit an ‘education request form’ to management. These education requests are often approved. There is, however, no formal expectation from management that employees engage in or seek out professional development. This finding is congruent with Hughes and Campbell’s 2009 research, which revealed that 49% of organizations “did not evaluate the impact of formal or informal learning on their employees at all” (p. 46). In my recommendations section, I address this lack of
formal expectation to transfer knowledge to the organization after an employee has participated in workplace learning (see Recommendation #4).

Both groups of employees do recognize that H2L is faced with budget constraints, and that lack of finances is one reason why an education request may be denied. H2L seems to spend its available funds on education that is mandatory for staff, and is selective with discretionary spending, due to lack of available funds. As a non-profit organization, H2L receives limited funding for employee professional development. Based on my conversations with staff, I conclude that H2L effectively promotes and encourages mandatory education, but may be less inclined to promote or encourage non-mandatory education that would not benefit the performance of employees on the job.

Administrators and frontline staff also agreed that communication barriers exist at H2L. Frontline staff, in particular, experience challenges with accessing information. Since many of the frontline staff do not work at the main H2L location, it is even more difficult for them to dialogue with colleagues. In addition, their having limited access to computers means that they cannot easily communicate electronically with colleagues. Similarly, supervisors expressed frustration by the expectation from senior management that they will disseminate information to staff. I have attempted to address the communication issues that were uncovered in my research (see Recommendation #6).

For many of its current employees, H2L has been their sole employer. As new hires continue to join the organization, employees have observed a gradual shift in the organizational norms. However, some of my participants spoke about feelings of tension between the relatively “new” H2L employees and those who have been at the organization for many years. In fact, a rite passage, of sorts, for new employees is to gain the trust of colleagues in order to be immersed in the culture. I quote one administrator to illustrate this issue of territoriality at H2L:

One of things, and one of the learning curves we’re talking about, is that people in H2L are extremely territorial. Only my way is the right way. That starts at the top and goes all
the way down to everybody. It’s good in a way, because they have developed some very good ways to do things. But, it’s very difficult for a new person to come into that because they have to learn everything as if they didn’t know anything at all.

This territorialism, it seems, results in communication barriers within H2L. Thus, communication barriers appear to exist vertically, between supervisor and employee, as well as horizontally, between departments and different H2L sites. The hierarchical and bureaucratic structure of the organization, I contend, contributes to these communication barriers, which in turn, impede learning.

Perspectives on non-mandated formal learning diverge between administrators and frontline staff. In general, administrators seem to be more dissatisfied than frontline employees with their workplace learning opportunities. I think that learning at H2L is a function of role. The frontline staff with whom I spoke perceived that they had adequate access to learning activities to allow them to perform well in their roles. In contrast, administrators seemed to be more interested in pursuing formal learning activities, such as conferences, courses, and workshops. These polarized perspectives result in what I consider to be two subcultures of learning at H2L: the administrator subculture of learning and the frontline employee subculture of learning.

To conclude my response to my first research question, I think it is important to highlight that, despite the perceived issues relating to workplace learning, in general, administrators and frontline employees are quite satisfied working at H2L. This contentment is evidenced in the fact that individuals remain employed with H2L for a long period of time. In fact, the organization has a ‘Quarter Century Club’ that celebrates the contributions of employees who have worked at H2L for more than 25 years. As noted in Chapter 4, participants in my research have been employed at H2L for slightly more than 15 years, on average. Many of the employees with whom I spoke commented on how H2L has a “family” culture, one in which employees have developed close ties with other employees. According to my participants, these “family” ties stem from the fact
that employees have been working and learning together for many years and know each other on a personal level.

One of the reasons why employees enjoy working at H2L is because of its strong client-centric values. In general, staff commented on the pride that they take in providing quality care to their clients. H2L espouses its client-centric values on its public website. In addition, the organization’s mission statement, its history as an integral component to the wellbeing of their clients, and the plethora of programs and services it offers help to further highlight its values. As an “outsider” to the H2L culture, I found it interesting to hear the lived experiences of the staff, and to learn how the organizational values transcend directly to workplace practices. The participant staff seemed to be passionately committed to their work and the care of clients. While talking with frontline staff, I quickly realized that H2L is responsible for providing a rich learning environment for individuals with developmental disabilities. Through its diverse programming and services, H2L facilitates learning and the acquisition of skills that boost feelings of self-esteem and confidence for clients, helping to increase clients’ independence.

Second Research Question

To what extent are these assumptions shared across the organization?

To reiterate, I contend that an employee’s role at H2L helps to shape his/her perspective both on culture and on learning. Perspectives on workplace learning diverge between administrators and frontline employees, as a result of the professional requirements for the roles and the skills and knowledge required for the work that they do.

Broadly, the administrator group is represented by professionals, such as human resources, finance, and health-care practitioners, including psychologists, social workers, nurses, occupational therapists, and physiotherapists. With regard to academic credentials, frontline employees, in general, hold college diplomas, whereas administrators have university degrees. The requirements that administrators must have, and the work that they perform, are much
different than that of the frontline workers. For example, administrators are often regulated by professional colleges and must engage in specific learning to retain their certifications, or seek to build their knowledge and expand their skills in order to more efficiently perform their work. During my conversations with administrators, I learned that they would like to have professional development more actively encouraged at H2L. Two administrators in particular spoke about their passion for learning. One administrator said, “It’s been my excitement for learning and developing professionally that has really rubbed off on a lot of the people around me.”

In contrast, frontline staff, as a group, expressed a smaller degree of interest in engaging in professional development. In particular, this group of employees is not keen to learn outside of business hours. The consensus amongst frontline staff is that they have the skills they need for their work. The mandatory education provided by H2L allows them to remain competent while working with clients. Having worked at H2L for an average of almost 22 years, these people know each other well. In addition to mandatory education, frontline employees learn informally by talking with each other and interacting with clients. The following quote of one frontline employee highlights the importance of informal learning at H2L:

I think it’s [learning] something that goes on everyday. People are always changing, the clients and ourselves. We learn from them, they learn from us, and the staff all learn from each other. Somebody might find a new technique that works better with a client, or even a new way to do something as simple as cooking. We will all benefit from that because we share information constantly.

My findings align with Hughes and Campbell’s 2009 survey results. That is, middle managers at H2L are more likely to engage in non-mandatory learning than is frontline staff. According to Hughes and Campbell, 66% of survey respondents indicated that their learning is formal and class-room based. Again, this finding is congruent with my own research. Much of the formal learning in which H2L employees engage is either organization-sponsored workshops or offsite, formal courses.
I conclude that H2L has a thin culture of learning. In Chapter 2, I discussed the terms ‘thick’ and ‘thin’ culture (Hodge, Anthony, & Gales, 2003). I said that a thin culture is not widely held or accepted throughout the organization; values are not commonly held across the organization. According to Schein, (2004), this means that H2L’s “learning gene” (p. 395) is not deeply embedded in the organization’s DNA, its organizational culture. Table 3, below, summarizes the extent to which some characteristics of a culture of learning are evident at H2L.

Table 3.

<table>
<thead>
<tr>
<th>Characteristics of a Culture of Learning</th>
<th>Evidence at H2L</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commitment to learning</td>
<td>Apparent, but weak</td>
</tr>
<tr>
<td>Feedback and communication</td>
<td>Apparent, but weak</td>
</tr>
<tr>
<td>Opportunities for self-reflection</td>
<td>Apparent, but limited by time pressures</td>
</tr>
<tr>
<td>Psychological safety</td>
<td>Yes</td>
</tr>
<tr>
<td>Learning that is personally relevant</td>
<td>Yes</td>
</tr>
<tr>
<td>Individual and organizational goal alignment</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Interestingly, in both the administrator and the frontline employee focus groups, one vocal participant dominated the conversation. Thus, my three-phase methodology proved valuable because during the individual interviews, I was able to hear from participants who were less vocal in their focus group. Also of interest, frontline employees and their direct supervisors have more direct contact with the clients whom H2L serves. The more removed employees are from H2L clients—both in terms of physical proximity and the nature of day-to-day work—the less likely they are to emphasize client care in their perspectives.

**Third Research Question**

*How are these assumptions supported by artifacts within the organization?*

I reviewed two types of H2L artifacts for my research: external documents and internal documents. Examples of documents produced by H2L and made available to the public include
the organization’s mission, organizational chart, history, annual reports, and information about programs and services. Much of this information is contained on the organization’s website or distributed to the community at large via promotional pamphlets and publications. Internal documents included three policies pertaining to employee learning, as well as the *Annual Mandatory Education Program Plan*, and copies of *The Link* (a pseudonym I assigned to an internal H2L newsletter).

I conclude that H2L’s artifacts, its external and internal documents, advocate its organizational values. The external documents emphasize the quality of care of clients, including the learning programs that are available. Not surprisingly, H2L’s internal documents reflect the organization’s staff-centric values, namely encouraging the professional development of staff.

Based on my research, I perceive a mismatch between the values espoused by the organization regarding the learning opportunities available to employees, and the degree to which employees perceive their learning to be supported and encouraged. My conversations with individuals representing frontline staff and administrators suggest that H2L does not actively encourage staff to engage in professional development. Supports such as resources and finances may be available to employees, but H2L does not formally expect its employees to develop knowledge and skills outside of the mandatory education offered by the organization. Table 4 maps some of the employees’ shared assumptions regarding learning which I identified in my data to the H2L documents that reflect those assumptions.
Table 4.

Mapping Employee Assumptions to H2L Documents

<table>
<thead>
<tr>
<th>Assumption</th>
<th>H2L Documents Reflecting Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Satisfaction</td>
<td>• Annual Report</td>
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<tr>
<td></td>
<td>• Organizational Values</td>
</tr>
<tr>
<td>Client Concern</td>
<td>• Mission Statement</td>
</tr>
<tr>
<td></td>
<td>• Annual Report</td>
</tr>
<tr>
<td></td>
<td>• Organizational Values</td>
</tr>
<tr>
<td>Layers of Learning at H2L</td>
<td>• Annual Mandatory Education Plan</td>
</tr>
<tr>
<td>Territorialism</td>
<td>• Organizational Chart (hierarchy)</td>
</tr>
<tr>
<td>H2L Supports Workplace Learning</td>
<td>• H2L Policies</td>
</tr>
</tbody>
</table>

Summary

In summary, the data collected throughout my research have allowed me to respond to the three questions that undergirded my study. My qualitative methodology facilitated my teasing out the shared assumptions regarding learning at H2L, and thus enabled me to describe the culture of learning at H2L.

I conclude that Schein’s three-phase methodology is, indeed, a viable tool to help uncover the culture of learning within an organization. Few tools exist to help a researcher navigate the exploration of culture within an organization. Having adapted Schein’s theoretical framework for my research, I suggest a modification to his levels of culture. Schein purports that the first level of culture is artifacts. I propose that the first level of culture is, in fact, an organization’s espoused beliefs and values. It was only after I spoke with organizational representatives, and employees in both the administrator and frontline employee groups, that I truly determined the artifacts that would best help me to describe and analyze H2L’s culture of learning. Therefore, I think that artifacts complement a description of espoused beliefs and values, and underlying assumptions. Furthermore, I think the levels of culture as described by Schein are blurred, and not easily distinguishable, especially for a novice researcher. Finally, I
disagree with Schein’s perspectives on surveying employees. Schein argues that surveys do not allow for depth in a cultural audit. As a novice researcher, I think that a survey would have facilitated my analysis process (as I outline later in this chapter). Going forward, I recommend that an organizational culture researcher combine both qualitative and quantitative methodologies. That is, I agree with Martin (2002), who suggests that cultural researchers employ a mixed-method approach to their studies.

Discerning the culture of an organization is a complex task. Employees are unique and their perspectives are shaped by their roles, experiences, and backgrounds. Accordingly, finding themes amongst and within employee groups proved challenging. While I have delineated trends in the comments, I conclude that subcultures of learning exist within H2L. The subcultures are a function of employee role, the number of years employees have worked at H2L, and individual motivation for learning. For example, administrators shared similar perspectives on learning, while frontline employees, as a group, shared similar views. Perspectives on learning also differed between employees who recently joined the organization (i.e., had been employed with H2L for three or fewer years) and employees who had been at H2L for a longer period of time (i.e., ten or more years).

In addition, newer employees tended to comment on the gaps in their workplace learning, the perceived deficiencies in the organization’s structure, and the rites of passage they experienced to assimilate into the organizational culture. Those who have been working at H2L for several years were, in general, more complacent with regards to perspectives on learning and H2L’s overall functioning. Individuals who have a high need for professional development and workplace learning also tended to be less satisfied with the degree to which H2L promotes and encourages workplace learning.

The consensus seemed to be that H2L does support learning, but the onus lies on individuals to actively seek out their own learning. An employee’s performance is not measured on whether or not he or she engages in workplace learning. Thus, based on data collected in my
conversation with the key organizational representative and review of organizational documents, the organization *thinks* that it actively supports and encourages learning. However, employees do not perceive a thick culture of learning at H2L. I think that the organization promotes a thick culture of learning for its clients, but does not emphasize this value as strongly with its employees.

**Recommendations**

In this section, I propose six recommendations on how I think H2L could more deeply embed learning in its culture. These recommendations are based on my conversations with employees at H2L. At their core, my recommendations are meant to celebrate and recognize the learning that occurs at H2L. The list is not meant to be in rank order. Furthermore, I recognize that the feasibility of my recommendations is, in part, dependent upon costs. Thus, I have attempted to propose relatively cost-effective ways to promote learning at H2L. I recommend that the organization should consider:

1. Formally tracking all learning that has been taken by employees.
2. Emphasizing learning as a critical component of performance reviews.
3. Creating and broadly disseminating a menu of learning options available to employees.
4. Establishing an organization-wide protocol for employees to report back following engagement in formal learning activities.
5. ReinSTATing a committee to help manage non-mandatory education.
6. Strengthening channels of communication to facilitate information sharing.

**Part I: Promoting professional practice.**

**Part II: Continuing to cultivate accessibility to information for frontline staff.**

I expand on each recommendation below.
**Recommendation #1**

*The organization should formally track all learning that has been taken by employees.*

Currently H2L centrally schedules, monitors, and tracks only education that central office considers mandatory. My conversations with organizational representatives, administrators, and frontline employees suggest that individual departments have their own process for managing employees’ non-mandatory workplace learning. I surmise that having a central record of the professional development activities in which employees have participated would be beneficial to the organization. Not only would this list clearly document all formal learning that has taken place at H2L, it could potentially serve as a resource for staff. For example, if a staff member was interested in developing a particular skill, he or she could consult the central workplace learning record to discover what colleagues have recently acquired training in the desired area. A conversation regarding learning may then ensue between the colleagues; thereby further promoting learning at H2L.

Having managers first track the professional development of their employees and then provide a central person in the human resources department with a summative report on the learning that has occurred within the department is, I contend, an inexpensive way to centrally manage non-mandatory learning. These departmental reports could then be aggregated by the HR office and made available to staff.

**Recommendation #2**

*The organization should make learning a critical component of performance reviews.*

While most employees referred to performance appraisals as an informal learning plan, there was no consensus on the degree of formality regarding the setting of learning goals and objectives. Performance reviews seem to be handled uniquely by each department. My recommendation that H2L ensure that learning is a critical component of employee performance reviews stems, in part, from my conversation with one administrator whom I quote below:
[E]ducation has to be a priority from the top and it can filter down. For example, if education is not part of performance reviews, it doesn’t become engrained in the culture as important.

To more actively promote and encourage the professional development of staff, I suggest that H2L revise the performance appraisals to more formally address learning by requiring the establishment of formal learning objectives and goals. By default, embedding formal learning objectives into employees’ performance appraisals would necessitate that managers and their employees discuss learning and each employee’s professional development annually.

**Recommendation #3**

*The organization should create and broadly disseminate a menu of learning options available to employees.* One frontline employee commented that, when performance reviews occur, he is often unaware of what types of learning opportunities are available to him. He suggested that having a list of available workshops, conferences, and courses might facilitate his discussing his professional development with his manager. Accordingly, I recommend that H2L consider posting examples of organization-sponsored learning activities to its Intranet website and distributing this list to departmental managers and/or employees (in multiple formats, i.e., both electronic and hard copies).

**Recommendation #4**

*The organization should establish an organization-wide protocol for employees to report back to their supervisors following their formal learning activities.* My conversations with employees at H2L revealed that no agreement exists regarding what the organization’s expectations are for employees after they have engaged in workplace learning. Some employees stated that their manager expects them to report back about their learning; other employees said that there is no formal expectation to do this. Many employees commented that they discuss their learning with colleagues informally. I suggest that the organization require its employees to make
a formal report following their training or professional development. When submitting an expense claim for training that has occurred, perhaps employees could attach a completed form to their claim that summarizes their learning, and would allow them to indicate if they would be willing to give a short presentation to other staff. This process would serve as way to affirm the learning that has taken place and to promote sharing learning with colleagues.

**Recommendation #5**

*The organization should consider reinstating a committee to help manage non-mandatory education.* Participants in the administrator focus group talked about the “Enhanced Education Committee,” a committee that was in place historically at H2L to help manage and plan non-mandatory education events and activities. This committee had been disbanded. I recommend the reinstatement of the Enhanced Education Committee (or its equivalent), and that it have representatives of all employee groups. The mandate of this committee could, for example, be to help oversee the non-mandatory education that is taking place at H2L, to assist with the development of the menu of available learning opportunities, and to plan and organize events that help to celebrate learning in the organization. I think that this committee would help to promote and encourage learning at H2L.

**Recommendation #6**

*The organization should strengthen channels of communication to facilitate information sharing.* In many of my conversations with staff, a recurrent theme that emerged was perceived barriers to communication. To facilitate communication at H2L, I suggest promoting professional practice and making information more accessible for frontline staff. Below, I describe briefly how these two proposed methods might strengthen channels of communication.

**Part I. The organization should promote professional practice.** This recommendation to promote professional practice stems directly from my interview with one administrator. The promotion of professional practice, for this individual, means that the organization actively
support professional development opportunities, in particular creating opportunities for networking with colleagues in similar roles within H2L and other agencies. In fact, this notion of enhancing partnerships between departments and local agencies was mentioned by three other participants. Therefore, I suggest that H2L continue to build communities of practice for its employees; opportunities for cross-pollination of ideas, knowledge, and skills between and among individuals in H2L and across other agencies that offer similar programs and services. These partnerships could encourage learning for staff and help to improve the quality of care provided by H2L, part of the organization’s fundamental mission.

Part II. The organization should promote accessible information for frontline staff. My conversations with frontline staff revealed that they feel somewhat marginalized when it comes to access to information. While I do acknowledge that H2L has made progress with implementing electronic technology, I recommend that it continue to maximize the benefits of this technology so that frontline employees have access to organizational information. For example, I propose one such way, through a scheduling review of videoconferences for frontline staff. Conversations with frontline staff indicated that they are interested in participating in videoconferences offered by H2L. However, the frontline staff I spoke with stated that they are often unaware of when the videoconferences are occurring, the sessions are not relevant to their work, or the sessions are scheduled at times when the staff cannot attend. Therefore, I recommend that to maximize the use and effectiveness of videoconferencing technology, H2L consider rescheduling videoconferences for frontline staff occurring after three o’clock.

Furthermore, frontline staff referred to communication at H2L as “hit and miss.” I recommend that H2L consider providing The Link, its internal newsletter, for frontline employees in their physical mailboxes, in order to improve communication.
Limitations of Study

While I did make every effort to ensure that my research was conducted with rigour, I acknowledge that it has some limitations. I identify three limitations to my research: small sample size, omitting participant observation, and my novice research skills. I outline each of these limitations below.

First, I recognize that my study has a relatively small sample size. I only spoke with ten employees, out of a possible 500 employees. However, I have clearly stated that my findings should not be generalized to the organization as a whole. Rather, I am providing a snapshot of H2L’s culture of learning, based on the perspectives of the ten individuals included in my study. I did attempt to ensure validity and trustworthiness of my data by gleaning the perspectives of three groups of employees (organizational representatives, administrators, and frontline employees). In addition, I used a multiple method approach (focus groups, semi-structured interviews, and document analysis techniques) to create a rich description and analysis of the organization’s culture of learning.

Second, I have deliberately elected to refrain from using participant observation in my research because I think that it is beyond the scope of my skills as a novice researcher. Moreover, I think that observing employees on the job would be intrusive to the care of clients.

Third, I do concede to be a novice researcher. Throughout my research, I sought guidance and feedback from my committee members and colleagues. Together, we navigated my research journey. I also relied on the literature to help guide my study and inform my research.

Significance of Study

Only a few empirical studies address organizational culture, and even fewer explore the facets of a culture of learning. My research contributes to the literature by proposing one strategy to describe and analyze the culture of learning in an organization, and thus enhancing the work by Schein. Furthermore, I contend that my study underscores the challenges associated with
qualitative research on organizational culture. While a qualitative approach to studying organizational culture lends depth to a study, I believe that it sacrifices breadth and adds complexity to the data collection and analysis processes.

**Further Research Avenues**

I propose four avenues for research to complement my work: conducting a survey, distributing a pre-interview questionnaire, delineating participant groups by the number of years which individuals have been employed by the organization, and speaking with the organization’s Executive Director. I expand on each below.

**Survey**

As I read through my reflective notes, I can clearly see that speaking with representatives from different roles within the organization was a valid strategy in order to unpack the culture of learning at H2L. However, I would consider complementing my qualitative approach with a survey. As a survey would allow for a larger sample size; it would also generate data that are purely quantitative.

**Pre-interview Questionnaire**

Another tactic that I think may assist with the ease of data analysis would be to provide participants with a short questionnaire prior to the individual interviews. This questionnaire would include a selection of questions that may be posed during the interviews, enabling participants to prepare their responses in advance. The interview also should incorporate additional questions that probe even deeper into the participants’ perspectives.

**Employee Group Delineation**

A third possibility for additional research would be to consider delineating employee groups by the number of years staff have been employed in the organization, rather than by employee classification. While I had initially requested that my participants be employed with
H2L for a minimum of one year, I did include one participant who had less than six months of experience at the organization. This participant provided a unique perspective on the organization, a perspective that would have been lost had I excluded her from my sample. In the case of H2L, perhaps the two employee groups could be those who have been with the organization for less than five years, and those who been with the organization for more than five years.

**Interview with Executive Director**

Finally, to gain a deeper understanding of the organizational perspective on the culture of learning, I would consider speaking with the most senior representative at the organization. While I did initially contact H2L’s Executive Director, my request was passed along to the human resource department. Perhaps conducting a semi-structured interview with this individual may have resulted in a richer understanding of the organization’s espoused beliefs and values.

**Closing Thoughts**

Despite the limitations imposed, I maintain that this study was conducted with objectivity and rigour, has yielded a robust description of the culture of learning at H2L, adequately synthesizes the findings, and provides some recommendations for H2L to more deeply embed learning into its culture. I contend that my research may serve as a catalyst for future studies that explore the components of a learning culture.

My research did reveal a thin culture of learning in one non-profit organization. However, that culture could be more clearly shared among organizational members if the organization addresses some recommendations, which I’ve outlined. It is my hope that my recommendations will be implemented by H2L, as it seeks to improve not only the quality of care for its clients but the quality of learning and professional development opportunities offered to employees.
REFERENCES


References (continued)


References (continued)


References (continued)


References (continued)


References (continued)


References (continued)


References (continued)


Cambridge University Press.

APPENDIX A

Ethical Clearance

September 1, 2009

Ms. Alison Hill
Faculty of Education
Queen’s University
c/o 16-201 Queen Mary Road
Kingston, ON K7M 2B1

GREB Ref #: GEDUC-460-09
Title: “A Culture of Learning in One Small Business”

Dear Ms. Hill:

The General Research Ethics Board (GREB), by means of a delegated board review, has
clarified your proposal entitled “A Culture of Learning in One Small Business” for ethical
compliance with the Tri-Council Guidelines (TCPS) and Queen’s ethics policies. In accordance
with the Tri-Council Guidelines (article D.1.6) and Senate Terms of Reference (article G), your project has
been cleared for one year. At the end of each year, the GREB will ask if your project has been
completed and if not, what changes have occurred or will occur in the next year.

You are reminded of your obligation to advise the GREB, with a copy to your unit REB, of
any adverse event(s) that occur during this one year period (details available on webpage
www.queensu.ca/vpr/greb/addrforms.htm#Adverse). An adverse event includes, but is not limited to,
a complaint, a change or unexpected event that alters the level of risk for the researcher or participants
or situation that requires a substantial change in approach to a participant(s). You are also advised that
any adverse events must be reported to the GREB within 48 hours.

You are also reminded that all changes that might affect human participants must be cleared
by the GREB. For example you must report changes in study procedures or implementations of new
aspects into the study procedures on the Ethics Change Form that can be found at
http://www.queensu.ca/vpr/greb/addrforms.htm#Change. These changes must be sent to Linda Frid at
the Office of Research Services or FRIDL@queensu.ca prior to implementation. Ms. Frid will
forward your request for protocol changes to the appropriate GREB reviewers and/or the GREB
Chair.

On behalf of the General Research Ethics Board, I wish you continued success in your research.

Yours sincerely,

Joan Stevenson, PhD
Professor and Chair
General Research Ethics Board

c.c.: Dr. Ruth Rees, Faculty Supervisor
Dr. Malcolm Welch, Chair, Unit REB
E-REB: c/o Graduate Studies & Bureau of Research, Attn.: Celina Freitas

JS/gi
APPENDIX B

Letter of Information: Organizational Perspective
“A CULTURE OF LEARNING IN ONE SMALL BUSINESS”

Dear Participant:

I am a graduate student in the Faculty of Education at Queen’s University. I am carrying out research entitled “A Culture of Learning in One Small Business” as part of my Master’s of Education degree, under the supervision of Dr. Ruth Rees. I am writing to solicit your participation and your organization’s participation in this project.

The purpose of my research is to investigate what the culture of learning is in one small business. With help from the literature, I define ‘learning culture’ as observable and unobservable processes, structures, norms, and communication patterns that support ongoing, work-related learning for organizational members (i.e., employees). I want to investigate how learning is regarded by, occurs in, and is supported by your organization.

In order to learn about the organization’s learning culture, I will need to interview you, in an individual face-to-face interview, that I will audio-record. The audio-recording will help me to capture what you say accurately. The initial interview should last no more than approximately one hour in length. Later, I may need to clarify some of my findings with you, but I would expect that could be easily done in a phone call or an e-mail communication. Our initial meeting could be held in your office, or at another location in the organization, and at a time of your convenience. There are no known physical, psychological, economic, or social risks associated with this study.

Your participation is voluntary and would focus on your answering questions about the learning that is ongoing within the organization. You are not obliged to answer any questions that you find questionable, and you have the right to withdraw from this study at any time. If you do decide to withdraw from this study, you must simply contact me via e-mail (alison.hill@queensu.ca) and I will immediately discontinue your participation in this study. Once you decide to withdraw from this study, you may request the removal of all or part of your data. I will keep the name of the
organization and your name confidential to the extent possible in my writing. Your employment will in no way be impacted whether you agree or not to participate in this research.

Only I, the researcher, Alison Hill, and my supervisor, Dr. Ruth Rees, will have access to your responses. While this information will be part of my Master of Education thesis, I may decide to publish parts of it in a professional journal or present my findings at conferences. Your identity will be protected to the extent possible. Moreover, once my thesis is accepted by my thesis committee, I would be pleased to share my findings with you.

If you have any complaints, concerns, or questions about this research, please feel free to contact Alison Hill; alison.hill@queensu.ca or project supervisor, Dr. Ruth Rees (613-533-3022); ruth.rees@queensu.ca. For questions, concerns, or complaints about the research ethics of this study, please contact the Education Research Board at ereb@queensu.ca or the chair of the General Research Ethics Board, Dr. Joan Stevensen 613-533-6081 (chair.greb@queensu.ca).

Again, thank you. I appreciate your support in my research study.

Sincerely,

Alison Hill
Master of Education Candidate
Queen’s University
APPENDIX C

Consent Form: Organizational Perspective
“A CULTURE OF LEARNING IN ONE SMALL BUSINESS”

Name (please print clearly): __________________________

1. I have read the Letter of Information and have had any questions answered to my satisfaction.

2. I have retained a copy of the Letter of Information for my records.

3. I understand that I will be participating in the study called A Culture of Learning in One Small Business. I understand that the purpose of this research is to determine the learning culture in one small business. This research will explore how learning is regarded by, occurs in, and is supported by my organization.

4. I understand that my participation in this study means that I will be asked to participate in an interview that will be audio-recorded. The audio-recording will help to ensure that my responses are captured verbatim. I understand that the interview should last approximately one hour in length. I realize that additional follow-up communications may be required to clarify and verify my responses, and I agree to participate in these short follow-up queries. I am aware that the number of communications will be kept to a minimum and will occur at my convenience. I recognize that there are no known physical, psychological, economic, or social risks associated with this study.
   I consent to having my individual interview audio-recorded. Initials: ______

5. I understand that both I and my organization will not be named, and privacy will be protected to the extent possible. Only the researcher, Alison Hill, and her supervisor, Dr. Ruth Rees, will have access to the data which is intended to describe the organization’s culture of learning. The findings may be published in professional journals or presented at conferences, but any such presentations will be of the general findings and the participants and organization will remain anonymous.

6. I understand that my participation in this study is voluntary and I may withdraw at any time. If I do withdraw from the study, I may request removal of all or part of my data from this research project. I understand that if I do decide to withdraw from the study, I must contact the researcher, Alison Hill, immediately via e-mail (alison.hill@queensu.ca).

7. I understand that whether or not I agree to participate in this research, my employment will not be impacted.
8. I am aware that if I have any questions, concerns, or complaints about this research, I may contact Alison Hill; alison.hill@queensu.ca or the project supervisor, Dr. Ruth Rees (613-533-3302); ruth.rees@queensu.ca.

9. I am aware that if I have any questions, concerns, or complaints about the research ethics of this study, I may contact the Education Research Board at ereb@queensu.ca or the chair of the General Research Ethics Board, Dr. Joan Stevensen 613-533-6081 (chair.greb@queensu.ca).

I have read the above statements and freely consent to participate in this research:

Please sign one copy of this Consent Form and return to Alison Hill. Retain the second copy for your records.

Signature: ________________________________ Date: ______________________________

Please write your e-mail address or postal address here if you wish to receive a summary of the findings.
APPENDIX D

Examples of Interview Questions: Organizational Perspective

1. What kinds of learning opportunities are available to frontline employees and to administrators?

2. Who decides what professional development is offered, and in what learning employees should be allowed to engage?

3. How and where are professional development activities carried out? For example, do employees often go outside of the organization for training (courses, programs, conferences, etc.)?

4. Is there any follow-up with employees or expectation from H2L after people engage in professional development?

5. What kinds of resources (e.g., time, money, equipment, personnel) has the organization contributed annually for their employees’ professional development?

6. How are professional development needs and opportunities communicated within the organization (i.e., is there a newsletter, an intranet site, a listserv, etc.)?

7. How is employee professional development tracked and measured in the organization?

8. Why might employees not participate in the professional development that is offered?

9. How is learning celebrated in the organization? What kinds of rituals, traditions, ceremonies, or events recognize learning that has taken place? How are employee achievements celebrated?

10. What are some of the activities within your organization that would be considered unique and help employees feel part of a work community? For example, dress down Fridays, celebration of birthdays and other special occasions.
Dear Participant:

I am a graduate student in the Faculty of Education at Queen’s University. I am carrying out research entitled “A Culture of Learning in One Small Business” as part of my Master’s of Education degree, under the supervision of Dr. Ruth Rees. I am writing to solicit your participation and in this project.

The purpose of my research is to investigate what the culture of learning is in one small business. With help from the literature, I define ‘learning culture’ as observable and unobservable processes, structures, norms, and communication patterns that support ongoing, work-related learning for organizational members (i.e., employees). I want to investigate how learning is regarded by, occurs in, and is supported by your organization.

In order to learn about the organization’s learning culture, I will need to interview you, first in a focus group setting, that I will audio-record. The focus group will consist of you and three to five of your colleagues and will last approximately one hour in length. The audio-recording will help me to capture what you say accurately. I may need to clarify some of my findings with you, but I would expect that would be easily done in a phone call or an e-mail communication. The focus group session will occur at a time of the group’s convenience. There are no known physical, psychological, economic, or social risks associated with this study. It is essential that the information shared in the focus group session be kept confidential. After the focus group interview has occurred, I request that you not discuss any of your perspectives on the learning that you have experienced at your workplace with any of your colleagues until after I finish all the interviews.

I am also inviting you to participate in a follow-up-hour individual face-to-face interview. The purpose of this interview is to gain a more in-depth understanding of your perspectives on the learning culture in your organization. If you do decide to participate in the individual interview, I may need to clarify some of my findings with you, but I would expect that would be easily done.
in a phone call or an email communication. The interview will occur at a time and location convenient for you.

Your participation in the focus group and individual interview is voluntary. I am going to be asking questions about the learning that is ongoing within the organization. You are not obliged to answer any questions that you find questionable, and you have the right to withdraw from this study at any time. If you do decide to withdraw from this study, you must simply contact me via e-mail (alison.hill@queensu.ca) and I will immediately discontinue your participation in this study. Once you decide to withdraw from this study, you may request removal of all or part of your data. I will keep the name of the organization and your name confidential to the extent possible in my writing. Your employment will in no way be impacted whether you agree or not to participate in this research.

Only I, the researcher, Alison Hill, and my supervisor, Dr. Ruth Rees, will have access to your responses. While this information will be part of my Master of Education thesis, I may decide to publish parts of it in a professional journal or present my findings at conferences. Your identity will be protected to the extent possible. Moreover, once my thesis is accepted by my thesis committee, I would be pleased to share my findings with you.

If you have any complaints, concerns, or questions about this research, please feel free to contact Alison Hill; alison.hill@queensu.ca or project supervisor, Dr. Ruth Rees (613-533-3022); ruth.rees@queensu.ca. For questions, concerns, or complaints about the research ethics of this study, please contact the Education Research Board at ereb@queensu.ca or the chair of the General Research Ethics Board, (chair.greb@queensu.ca).

Again, thank you. Your interest in participating in this research study is greatly appreciated.

Sincerely,

Alison Hill
Master of Education Candidate
Queen’s University
APPENDIX F

Consent Form: Employee’s Perspective
“A CULTURE OF LEARNING IN ONE SMALL BUSINESS”

Name (please print clearly): ____________________________________

4. I have read the Letter of Information and have had any questions answered to my satisfaction.

5. I have retained a copy of the Letter of Information for my records.

6. I understand that I will be participating in the study called A Culture of Learning in One Small Business. I understand that the purpose of this research is to determine the learning culture in one small business. This research will explore how learning is regarded by, occurs in, and is supported by my organization.

7. I agree to participate in ONLY a one-hour focus group which will be audio-recorded.
   □ Yes

I consent to having my focus group audio-recorded.  Initials: ______

OR

I agree to participate in a one-hour focus group AND a one-hour individual interview which will both be audio-recorded.  □ Yes

I consent to having my focus group and individual interview audio-recorded.  Initials: ______

8. I understand that I must keep the information shared in my focus group confidential. I realize that after the focus group session has occurred, I will not discuss my perspectives on the learning that I have experienced at my workplace with any of my colleagues until after all of the interviews have been completed.

9. I understand that additional follow-up communications may be required to clarify and verify my responses in the focus group and/or individual interview (if applicable), and I agree to participate in these short follow-up queries. I am aware that the number of communications will be kept to a minimum and will occur at my convenience.

10. I recognize that there are no known physical, psychological, economic, or social risks associated with this study.
11. I understand that both I and my organization will not be named, and my privacy will be protected to the extent possible. Only the researcher, Alison Hill, and her supervisor, Dr. Ruth Rees, will have access to the data which is intended to describe the organization’s culture of learning. The findings may be published in professional journals or presented at conferences, but any such presentations will be of the general findings and the participants will remain anonymous.

12. I understand that my participation in this study is voluntary and I may withdraw at any time. If I do withdraw from the study, I may request removal of all or part of my data from this research project. I understand that if I do decide to withdraw from the study, I must contact the researcher, Alison Hill, immediately via e-mail (alison.hill@queensu.ca).

13. I understand that, whether or not I agree to participate in this research, my employment will not be affected.

14. I am aware that if I have any questions, concerns, or complaints about this research, I may contact Alison Hill; alison.hill@queensu.ca or the project supervisor, Dr. Ruth Rees (613-533-3302); ruth.rees@queensu.ca.

15. I am aware that if I have any questions, concerns, or complaints about the research ethics of this study, I may contact the Education Research Board at ereb@queensu.ca or the chair of the General Research Ethics Board, (chair.greb@queensu.ca).

I have read the above statements and freely consent to participate in this research:

Please sign one copy of this Consent Form and return to Alison Hill (in person on the confirmed date of the focus group). Retain the second copy for your records.

Signature: _______________________________ Date: __________________

Please write your e-mail address or postal address here if you wish to receive a summary of the findings.
APPENDIX G

Examples of Interview Questions: Employee’s Perspective

1. Tell me about your role at H2L.
   a. What is your role in the organization? What do you do?
   b. How long have you been in this role?
   c. Have you always been in this role?
      i. If no, what other roles have you held?

2. How would you describe the organizational culture at H2L?

3. To what extent is learning part of your work?

4. How does most of your workplace learning occur? For example, how frequently do you:
   a. Learn from colleagues?
   b. Attend conferences?
   c. Participate in meetings?
   d. Engage in H2L committees?
   e. Initiate self-directed learning (i.e., through your own reading, at your own initiative)?
   f. Participate in videoconferences?
   g. Receive/provide coaching and mentoring?
   h. Receive feedback from your supervisor regarding your performance?

5. After you have participated in professional development, what kind of follow-up is expected from H2L?

6. To what extent would you say that H2L encourages learning for its employees?

7. I’d now like to further explore the workplace learning opportunities that are available to you.
   a. What kinds of workplace learning activities does H2L offer?
   b. Have you participated in other forms of workplace learning that have not been initiated by H2L?

8. Who decides what workplace learning activities will be offered for employees of H2L (i.e.,
   an individual/committee)? Do you or any of your colleagues have any input into this decision?

9. How or where do you find out about the workplace learning that is available to you? For example, is there a particular place, meeting, person, or bulletin board here that informs you about professional development opportunities?

10. What kinds of workplace learning initiatives would you like to participate in but are currently not available to you?
11. Were there times in the last year that you wanted to participate in some type of workplace learning opportunity but couldn’t? If so, what prevented you from participating?

12. The following questions concern the management of your workplace learning.
   a. Who monitors or keeps track of the workplace learning that you have taken?
   b. Do you have a learning plan or some type of document that outlines the workplace learning that you would like to participate in?
      a. If so, does your supervisor have a copy of this plan?

13. I would now like to discuss how new ideas are implemented at H2L.
   a. If you had an idea for a new process, procedure, activity, etc. at H2L, how would you go about attempting to have this idea implemented?
   b. How receptive do you think management would be to your ideas?

14. How do you support, facilitate, or encourage workplace learning at H2L?
## APPENDIX H

### Participant Characteristics

<table>
<thead>
<tr>
<th>ID</th>
<th># of Years Employed with H2L</th>
<th>Current Role</th>
<th>Other Roles Held</th>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>O1</td>
<td>24</td>
<td>Human Resources Representative</td>
<td>Various roles within the organization, ranging from Research Assistant to Supervisor</td>
<td>Bachelor of Arts (Honours). Went to college part-time, while working at H2L, and obtained a diploma in Human Resources Management.</td>
</tr>
<tr>
<td>O2</td>
<td>9</td>
<td>Supervisor</td>
<td>Scheduling Clerk, Payroll Clerk, Secretary</td>
<td>College Diploma</td>
</tr>
<tr>
<td>A1</td>
<td>26</td>
<td>Supervisor</td>
<td>Various nursing roles</td>
<td>Bachelor of Science, Nursing. Recently acquired Masters of Nursing.</td>
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<tr>
<td>A2</td>
<td>1</td>
<td>Coordinator</td>
<td>No</td>
<td>Bachelor of Arts</td>
</tr>
<tr>
<td>A3</td>
<td>4</td>
<td>Coordinator</td>
<td>No</td>
<td>Bachelor of Arts</td>
</tr>
<tr>
<td>A4</td>
<td>2</td>
<td>Senior Management</td>
<td>No</td>
<td>Masters of Business Administration</td>
</tr>
<tr>
<td>F1</td>
<td>20</td>
<td>Vocational Life Skills Instructor</td>
<td>Residential Counselor, Behaviour Management</td>
<td>College Diploma</td>
</tr>
<tr>
<td>F2</td>
<td>20</td>
<td>Vocational Life Skills Instructor</td>
<td>Community Residences</td>
<td>College Diploma</td>
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<tr>
<td>F3</td>
<td>20</td>
<td>Vocational Life Skills Instructor</td>
<td>Various frontline positions</td>
<td>Bachelor of Arts and College Diploma</td>
</tr>
<tr>
<td>F4</td>
<td>27</td>
<td>Community Counselor</td>
<td>Residential Counselor</td>
<td>College Diploma</td>
</tr>
</tbody>
</table>
### APPENDIX I

**Template to Organize Participant Perspectives**

R1: What are some of the employees’ assumptions about their work-related learning?
R2: To what extent are employees’ assumptions about their work-related learning shared across the organization?

<table>
<thead>
<tr>
<th>Components</th>
<th>Espoused Beliefs</th>
<th>Underlying Assumptions</th>
<th>Focus Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ORG</td>
<td>ADM</td>
<td>FRNT</td>
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<tr>
<td>Organizational values</td>
<td>O1</td>
<td>A1</td>
<td>A2</td>
</tr>
<tr>
<td>Organizational context</td>
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<td></td>
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<tr>
<td>Language</td>
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<tr>
<td>Communication</td>
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<tr>
<td>Knowledge management</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Stories and myths</td>
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<td></td>
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<tr>
<td>Rites</td>
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<td></td>
<td></td>
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<tr>
<td>Rituals</td>
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<tr>
<td>Ceremonies</td>
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<tr>
<td>Heroes/heroines</td>
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<tr>
<td>Socialization</td>
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<tr>
<td>Workplace Learning (WPL)</td>
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<tr>
<td>Examples of WPL</td>
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<tr>
<td>Predominant form for WPL</td>
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<tr>
<td>Available WPL initiatives at H2L</td>
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<td></td>
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<tr>
<td>Perceived degree of organizational support for WPL</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Desired WPL that is currently unavailable</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Wanted to engage in WPL but was denied</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How individual learns about WPL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who tracks WPL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How individual supports WPL at H2L</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX J

List of Codes

Organizational Culture Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORGSTRUCT</td>
<td>Structure of the organization (e.g., organizational chart).</td>
</tr>
<tr>
<td>ORGVALUES</td>
<td>Perceived ‘values’ of the organization.</td>
</tr>
<tr>
<td>ORGCONTEXT</td>
<td>Factors that help to describe the context in which the organization operates.</td>
</tr>
<tr>
<td>LANGUAGE</td>
<td>Language (jargon) that is organization-specific.</td>
</tr>
<tr>
<td>COMMUNICATION</td>
<td>The ways in which communication occurs within the organization.</td>
</tr>
<tr>
<td>KNOWLEDGEMGMT</td>
<td>How knowledge is managed within the organization.</td>
</tr>
<tr>
<td>STORIES</td>
<td>Anecdotal accounts of organizational historical events and employees, told from the perspective of employees.</td>
</tr>
<tr>
<td>MYTHS</td>
<td>Hyperbolic tales of past organizational events or employees.</td>
</tr>
<tr>
<td>RITES</td>
<td>Events that occur in order for employees to become members of the organization and integrated into its culture.</td>
</tr>
<tr>
<td>RITUALS</td>
<td>Events that habitually occur.</td>
</tr>
<tr>
<td>CEREMONIES</td>
<td>Events and celebrations that are unique to the organization.</td>
</tr>
<tr>
<td>HEROES/HEROINES</td>
<td>Individuals who were mentioned as icons in the organization.</td>
</tr>
<tr>
<td>SOCIALIZATION</td>
<td>How culture allows employees to feel part of the organization.</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
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</tbody>
</table>
| WPLSTRUCT    | The structure of the workplace learning initiatives.  
- Timing (during work hours/outside business hours, length of sessions)  
- Frequency (number of sessions)  
- Location of sessions (onsite, offsite) |
| WPLCONTENT   | The content of workplace learning initiatives.  
- What types of skills and knowledge are employees learning? |
| WPLMGMT     | How workplace learning is managed (i.e., tracked and monitored).  
- Who tracks the workplace learning that occurs?  
- Is there a requirement for employees who have participated in formal learning?  
- How do employees request a learning opportunity? |
| WPLSUPPORT | Perceived degree of support for workplace learning.  
- Factors that determine approval/denial of education requests. |
| FORMALWPL   | Examples of organization-supported workplace learning initiatives. |
| INFORMALWPL | Examples of spontaneous, non-mandated learning that occurs. |
| EMPVALUES   | Individual employee values regarding their learning.  
- Why employees choose to or refrain from participating in learning.  
- Examples of the value employees place on their own professional development and workplace learning.  
- Examples of how employees facilitate, support, and encourage learning at H2L.  
- What makes employees stay at H2L? |
| EMPDESIREDWPL | Examples of workplace learning activities desired by employees, but are currently unavailable in the organization. |
| EMPEDUC     | Examples of employee educational backgrounds.  
- Professional requirements for role(s) in organization. |
## APPENDIX K

### Examples of Common H2L Language

<table>
<thead>
<tr>
<th>Term</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client</strong></td>
<td>An individual with developmental disabilities who engages in H2L’s programs and services. Clients are “medically fragile,” “compromised,” and “developmentally delayed” (terms used by my participants).</td>
</tr>
<tr>
<td><strong>Education Request</strong></td>
<td>A paper document submitted by an employee to his or her supervisor, requesting a formal learning opportunity that is not offered specifically by H2L.</td>
</tr>
<tr>
<td><strong>Occupational Health &amp; Safety Committee, Wellness Committee, Mandatory Education Committee, Enhanced Education Committee</strong></td>
<td>Examples of H2L committees. Generally these committees have formal terms of reference and work plans in place.</td>
</tr>
<tr>
<td><strong>Mandatory Education</strong></td>
<td>To maintain its ministry funding, H2L must offer mandatory education to all staff, and education specific to staff that work directly with clients.</td>
</tr>
<tr>
<td><strong>Decisions go “up the line” and/or “up the chain of command”</strong></td>
<td>Colloquialisms provided by employees in my study to describe how communication occurs at H2L.</td>
</tr>
<tr>
<td><strong>Individual Behaviour Support Plan (IBSP)</strong></td>
<td>A philosophy of care developed by H2L that ascertains that one must modify the environment, not the client.</td>
</tr>
<tr>
<td><strong>Quarter Century Club</strong></td>
<td>Staff who have been employed with H2L for at least 25 years become members of this club. The club meets annually for a luncheon hosted by H2L to recognize the long service commitment of employees.</td>
</tr>
<tr>
<td><strong>Required Organizational Practice (ROP)</strong></td>
<td>Under accreditation standards, H2L must comply with required organizational practices to maintain accreditation.</td>
</tr>
<tr>
<td><strong>Senior Management Group (SMG), Residential Counselor (RC), Community Support Worker (CSW), Occupational Therapists (OT), Physiotherapist (PT)</strong></td>
<td>Examples of employee classifications at H2L.</td>
</tr>
<tr>
<td><strong>Skills Treatment Area (STA), Group Homes, Home Share Program</strong></td>
<td>Examples of departments at H2L.</td>
</tr>
<tr>
<td>Term</td>
<td>Meaning</td>
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<td>-----------------------------</td>
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</tr>
<tr>
<td>The H2L Way</td>
<td>According to my participants, H2L is a “family culture” where individuals are territorial because they have been working at the organization for many years and believe their way is the only way.</td>
</tr>
<tr>
<td><em>The Link</em> (pseudonym)</td>
<td>A newsletter produced regularly by H2L. <em>The Link</em> is a centralized communication tool.</td>
</tr>
<tr>
<td>Videoconference</td>
<td>A work-related learning tool that allows individuals to meet in a conference room at the main H2L location and join networks of individuals to learn about pre-scheduled topics.</td>
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</tbody>
</table>