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*Studia paedagogica*. 2018, vol. 23, iss. 2, pp. [205]-215

ISSN 1803-7437 (print); ISSN 2336-4521 (online)

Stable URL (handle): <https://hdl.handle.net/11222.digilib/138258>

Access Date: 16. 02. 2024

Version: 20220831

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# RESEARCH MEMORANDUM

## ORGANIZATIONAL EDUCATION

Written by the convenors of EERA network 32, Michael Göhlich (Erlangen, Germany), Petr Novotny (Brno, Czech Republic), Line Revsbaek (Kolding, Denmark), Andreas Schröer (Darmstadt, Germany), Susanne M. Weber (Marburg, Germany), Byung Jun Yi (Busan, Korea). Discussed in meetings of EERA network 32 at ECER 2014 in Porto, 2015 in Budapest and 2016 in Dublin (with Audrey Addi-Raccach, Annett Adler, Gunnar Augustsson, Daiva Bukantaite, Jason Chan, Helen Colley, Peter Csizmadia, Mariana Dias, Valerie Drew, Bente Elkjaer, Nicolas Engel, Udo Gerheim, Julia Gnihl, Carlos Gonzales, Janinka Greenwood, Gabor Halasz, Barbara Lindemann, Claudia Lobe, Heinz Metzen, Kevin Orr, Henning Pätzold, Beatrix Palt, Milan Pol, Jenny Reeves, Johannes Ries, Joy Rosenow, Maria Grazia Riva, Zehava Rosenblatt, Petr Safronov, Michael Schratz, Roberta Sciannamea, Didem Sözen Sahiner, Paul Sundar, Emanuel Tamir, Dorit Tubin, Sarah Thys, Anh-Dao Tran, Nana Vaaben, Theo van Dellen, Johannes Wahl, Michael Wannagot, Ruth Wouters) and confirmed by the general assembly of the EERA network 32 Organizational Education at ECER 2016 in Dublin.

### Preamble

The aims of this memorandum are to secure, promote and further the continuity, quality and development of organizational education research. Research in the field of organizational education explores organizational behavior, especially organizational learning and change, from an educational perspective. By identifying key research topics in organizational education and by developing these within the academic community, the field can be increasingly systematized and institutionalized.

The memorandum<sup>1</sup> is intended to promote understanding of the program and topics of organizational education research among the academic community. Its purpose is to support the integration of organizational education in research policies and in higher education policies. This includes the creation and expansion of academic posts and programs in the field of organizational education at universities. The memorandum is also designed to encourage greater funding of organizational education research at the national and European level. Furthermore, the memorandum can serve as a frame of reference for interdisciplinary dialogues on organizational development between researchers and practitioners.

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<sup>1</sup> This European Research Memorandum on Organizational Education takes as its starting point the institutionalized debate on organizational education initiated by the German Educational Research Association (GERA) in 2006 and the European Educational Research Association (EERA) in 2014. The German version of a related memorandum (Göhlich, Weber, Schröer et al 2014: Forschungsmemorandum Organisationspädagogik) has been used as a core reference document for drafting the European Research Memorandum on Organizational Education.

In the following, this memorandum first provides a basic definition of organizational education as understood by both the authors and the members of the EERA network 32 (organizational education) and a discussion of same. Secondly, central focal areas of research in organizational education are outlined. And, lastly, potential approaches that can be used to undertake research in the field of organizational education are described.

## 1 Organizational Education

1.1 *Organizational education is an important facet of educational research. Its starting point is therefore the on-going debate about education and the discourse within educational science.*

- In the context in which education is treated as a discipline, organizational education represents one among the other educational sub-disciplines (i.e. school education, adult education etc.) as it shares similar academic interests with regard to human development, schooling, education, learning and the professional support of these. In contrast with these other educational sub-disciplines, it has organizations as its primary focus, which – depending on their theoretical make-up – can be understood being on the meso-level of society, taking the form organized contexts for learning processes and as target-oriented collective arrangements providing for organization and learning.
- Compared to other (sub-)disciplines that study organizations, such as organizational psychology, organizational sociology or business administration studies, organizational education explicitly and critically reflects on the normative roots and aspects of learning, such as the goals of learning, and raises awareness of confrontational, contradictory and dysfunctional phenomena. Organizational education research places particular emphasis on the humanization and sustainability of organizations.
- In the field of organizational education, research practices are required that are philosophical, empirical and analytic as well as development-oriented. As organizational education makes apparent the conflicting values and ethical standpoints involved in the process of organization, it also explicitly reflects such conflicts within its research practices.

1.2 *Organizational education as a discipline deals with both educational and non-educational organizations.*

- Organizational education uses the term ‘organization’ to describe both the process itself as well as the entity that results from this process. In the case of the latter, organizations can be understood as social

entities (communities, practice structures) that pursue specific goals, exhibit consistent boundaries and distinct cultures, based on the division of labor and coordinated collaboration of its members. Organizations in the process of creation or decline, virtual and project-based organizations and organizations which are more or less loosely coupled networks, start-ups and emergent social movements, can also be considered entities that are relevant to educational research.

- On the one hand, organizational education deals theoretically, methodologically and empirically with organizations that are educational in the narrow sense, such as day care centers, schools, youth centers, shelters, universities and institutions for continuing and adult education. In this regard, it builds on and further develops the existing work in school education, adult education and other sub-disciplines of educational research.
- On the other hand, organizational education also deals theoretically, methodologically and empirically with organizations whose primary purpose is not educational in nature and analyzes the processes and structures of learning that they have put in place. This focus on analysis in organizational education is consistent with an understanding of education as a concept that has no strict limitations and boundaries.

1.3 *The central focal area of research in organizational education is organizational learning. This should be understood as learning in organizations, learning by organizations and learning between organizations.*

- Learning in organizations can take place individually or collectively. Of interest is how each organization, as a context for learning, hinders or supports learning. Similarly important is the role of the individual and the collective as learners and how these influence the development of the organization.
- In order to learn, organizations must act as protagonists within the learning context. By adopting patterns of cooperative practice, organizations as sociomaterial assemblages learn implicitly during their on-going performance processes. Explicit learning by organizations occurs when collective analysis is undertaken and the implicit process is considered. Learning by organizations can be formal and informal. While formal learning by organizations is typically highly structured and includes systems to monitor learning outcomes, informal learning is less structured and involves the self-directed learning of communities of practice.
- Learning between organizations involves the practices of organizations connecting, interacting and relating to and with other organizations in contextual multi-layered embeddings. When it comes to inter-

organizational learning, a key aspect is research into networks and alliances, together with the emergence of new societal, cultural, economic and political practices.

- Thus, organizational learning can be explored both as learning by individuals and/or collectives within organizations as well as learning by organizations and learning between organizations. In the first instance, organizations are viewed within a contextual environment, in the second instance they are perceived more in terms of protagonists, whilst the final instance involves elements of both.

1.4 *The perspective of organizational education is that of process-related reflection. An understanding of processes is essential for research in the field of organizational education.*

- In accordance with the epistemological approach to education, organizational education looks not only at the structural constitution of organizations, but also at their processual and cultural aspects. Thus, theories of culture and practice can be employed as reference points in organizational education
- so that organizational learning is seen in terms of the processes of cultural practices. In other words, not only a before and after comparison of the organization or the organizational structure is of interest – the focus is also on the *modi operandi* of organizational learning.
- Organizational education research addresses the emergence and transitions in organizational identities from a temporal-relational perspective. By adopting historical and genealogical perspectives, it is possible to analyze emergence, continuity, change, and demise.
- This process-related approach has implications for the methodology and design of research. Organizational education has an extensive repertoire of research methods at its disposal that combine quantitative and qualitative research approaches (see section 3).

1.5 *Organizational education research focuses on organizations as structures at the meso-level of society employing multi-layered perspectives.*

- Organizational learning (meso-level) can be approached as individual and collective learning (micro-level) embedded within institutional, sectoral and societal frameworks (macro-level).
- Macro-level characteristics (political, legal and economic frameworks etc.) provide the environment within which organizational learning is contextualized and influenced and this requires the definition of boundaries and translation by the organization. Furthermore, the macro-level introduces new institutional elements which are incorporated by the organization.
- Research into micro-levels of learning (as a context for organizational learning) takes into account the heterogeneity and multiplicity of

individual and collective constructs of reality and analyzes the organizational strategies and practices that shape organizational worlds.

- Together the micro- and macro-level characteristics can be regarded as providing constraints on the meso-level - an aspect that is of primary interest to organizational education.
- Depending on the theoretical framework, a multi-layered view of organizational education may include the exo-level of outside influences on individual and organizational activities as well as the chrono-level of temporal development and biographical sequence.

#### 1.6 *The relationship between theory, empirical research and practice*

- Organizational education embraces theory as well as methodology and empirical research. Ideally, all three of these aspects are employed in combination in studies of the transformational processes within organizations. The international discourse in the area of organizational education aims to further the development and advancement of knowledge and understanding of organizational learning from an educational perspective. This should provide a knowledge base for professional organizational education that will enable critical reflection on the rationalities of learning in, by and between organizations.
- On the basis of theory and empirical organizational education research, a variety of research methodologies and concepts have been developed. Employed are quantitative as well as qualitative methods, mixed methods and triangulation based on theoretical substructures that make possible the conceptual development of organizational learning.

## **2 Research topics in the field of organizational education**

Organizational education focuses mainly on organizational learning and its support. The topics considered in organizational education research are thus its aspects, protagonists and framework conditions. The framework conditions of organizational learning are influenced on the socio-economic, political, organizational, collective as well as the individual levels.

### 2.1 *Organizational learning structures and processes*

- Organizational education research consciously and critically reflects on the ways in which learning in organizations can be explored. It examines organizational learning from the structure-oriented and/or process-related perspectives. The former considers the various protagonists, actors, media and programs of organizational learning, studying these both separately and/or as structured ensembles. In contrast, process-related approaches explore the performativity

and modi operandi of organizational learning as processes of continual organizational development, as well as the procedural nature of organizational memory and forgetting and the temporal-emergent nature of learning phenomena and events.

### 2.2 *The protagonists of organizational learning*

As there are various levels on which organizational learning can be studied (see section 1.5), it is possible to differentiate between the individual protagonists of organizational learning.

- In organizational education research the following may be explored either separately or in terms of their interaction with each other: (1) protagonists who are involved as individuals in organizational learning (e.g. managers, employees etc.) (2) collective protagonists who learn as teams and contribute to organizational learning (e.g. communities of practice or interest groups) and (3) the organization itself that evolves as a learning social entity in terms of its aims and practices of collaboration, its structure and culture (e.g. learning corporation) and additionally acts as a corporate protagonist in intercommunication with other organizations, networks and environments.
- By differentiating between the various protagonists of learning, organizational education research also consciously and critically considers any power relationship inherent in or otherwise influencing the processes and circumstances of learning and that otherwise impinges on the protagonists. With regard to the nature and processes of organizational learning, it makes a difference whether the protagonists under consideration are managers, interns, employees, associates or volunteers in the respective organization. Organizational education research takes such power positional embeddings into account when exploring organization-related learning issues.
- Furthermore, in researching organizations as protagonists of learning it is necessary to consider whether the collective under investigation is controlled directly by its members or whether it is under the authority of others. Also, exploring organizations as protagonists puts an emphasis on identifying or otherwise reflecting on the stated aims and history of regulations of the respective organization and its relevant policies, as well as on the type of organization in question (e.g. hybrid or virtual).

### 2.3 *General framework conditions of organizational learning*

The general framework conditions of organizational learning are imposed both outside and within the respective organization and the reconstruction of these is one of the topics of research in organizational education.

- One of the societal framework conditions of organizational learning and education is the major expansion of inter- and transnational businesses in the wake of globalization. Organizations of various kinds and from various sectors operate under conditions of inter- and transnationality and respond to being placed within this context by means of organizational learning (e.g. intercultural openness, diversity management, diversity education etc.). Organizational education research analyzes how specific features of organizational learning strategies meet the challenges of globalization.
- Additional framework conditions of organizational learning are the aspects of gender and family, while the ways in which these aspects of contemporary life are treated in relation to organizational learning (e.g. gender mainstreaming, work-life-balance etc.) are also of interest. The methods employed by organizations to deal with other societal framework conditions, such as social inequality and cultural differences (e.g. the use of mentoring programs) are equally relevant to organizational education research. Significant in terms of the general framework of organizational learning are semantic embeddings and political programs and conditions (e.g. the moralization of markets). They contextualize organizations and define the legitimate knowledge and legitimate external and internal activities of organizations.
- Internally, organizations are conceptually, materially and performatively connected to power and power relationships. Power is relevant to cultural concepts, structural conditions, underlying grammars and institutionalized practices in the processes of organization. Thus power conditions of organizational learning can be theorized as organizational regime, or organizational cultural order. Structural organizational analysis involves the analysis of performativity and cultural practice within the process of organization, (e.g. in ritualized organizational practices). Organizational education is interested in the analysis of organizations as the actual incarnations of practice. Here, individual, collective and organizational bodies interact in ritualized and transformative organizational practices. In addition, organizational education considers the changes to organizational power structures that occur as a result of organizational learning.
- In view of the above-specified concerns, organizational ethics issues are relevant to organizational education either as contextual factors or as the subjects of organizational learning processes and the corresponding research.
- In addition, attitudes, emotionality and atmosphere in organizations are regarded as core objects for research in organizational education.



Attitudes can be seen as a major factor within the context organizational learning. Attitudes are generated by the individual and collective aesthetic experience and emergent atmospheres in organizations. Rituals, symbols and narratives can be explored as those aspects that determine attitudes. In this way, attitudes and atmosphere can be explored in relation to prominent events, their aesthetic corollaries and symbolic importance (e.g. celebrations, organizational recruitment and dismissal).

#### 2.4 *Institutionalized support for organizational learning*

As the encouragement of learning is central to the concept of education, the structures, processes and methods used to support organization learning – as well as those factors that hinder it - are also studied in organizational education research.

- On the one hand, the practices of organizational education are analyzed in a narrower sense as educationally conceptualized aspects in terms of their developmental relevance, their implications, individual and collective consequences, and their organizational adequacy. Such practices may include comprehensive organization and staff development programs, the use of organizational consultation services, specific types of interventions and analysis of the way these impinge on organizational routines – for example, large group interventions, team development, supervision, coaching, formative evaluation and aesthetic interventions.
- Furthermore, institutionalized management systems are investigated in the wider sense as structures claiming to facilitate, support and/or prohibit learning (e.g. knowledge, innovation, quality, stakeholder and change management). Here it is of special interest to identify the professionals (and their academic qualifications) who are responsible for designing the corresponding structures. They are educationally relevant in their learning support function and thus represent a parameter deserving of analysis in organizational education research.

#### 2.5 *Organizational learning in specific fields of practice*

Additional research topics are derived from the different fields of practice within which the respective organizations operate.

- As stated above (section 1.2), organizations that are primarily educational in their aims are considered as special cases (although not exclusively) within the organizational field explored by organizational education research. It is often the case that the design of a research project is determined by whether the organization in question is primarily educational in purpose or not. Educational organizations are e.g. day care centers, schools, socio-educational centers, social care institutions,

universities and institutions for adult education. They all share the basic objective of serving educational aims; namely to foster, educate, teach, convey knowledge and skills as well as support learning.

- Organizations whose primary goal is not educational can be distinguished from these and include, for example, administrative bodies, commercial enterprises, hospitals, noneducational networks and non-profit organizations. Their main purpose is not to support learning, but rather to manage or administer, to generate profit, to heal or to rehabilitate and facilitate change.
- This differentiation between organizations with primarily educational aims and organizations with primarily non-educational aims does not necessarily mean that organizational learning differs within these organizations. However, organizational educational research takes into account the fields of practice and societal-subsystems within which an organization is positioned.

#### *2.6 Institutionalization, professionalization and internationalization of organizational education*

Finally, the institutionalization, professionalization and internationalization of the field of organizational educational are also relevant to research.

- Organizational education research focuses on the history of the field itself and on patterns of institutionalization and professionalization. Training and continuing education are established topics in the field of organizational education. This fields' demarcations towards related fields is to be researched. Here, discourse oriented research perspectives may be taken into account.
- Another issue is that of institutions pivotal to the institutionalization and professionalization of organizational education. What is considered here is the role that educational science institutes, university departments and other higher education institutes play in such processes of institutionalization and professionalization. Hence it is expedient to look at the contribution of internationalization at European (e.g. EERA) and global level (e.g. WERA) to the knowledge production regarding organizational education.
- Organizational education research seeks to respond to the challenge that requires academics and university institutions to engage more extensively with local and regional private and public sector organizations as well as with societal concerns, projects and movements. Nevertheless, it also takes into account the complex and structurally conflicting relationships between policy, research and markets. At the European level, use of the so-called platform strategies of multi-stakeholder

research represents a relevant approach. These not only focus on participatory research, but involve design-based research, integration research and development in a form that is extensively interconnected. As a result, organizational education research is becoming increasingly involved in the debate on the responsibility and responsabilization of science and scholarship.

### **3 Research approaches: methodologies and methods**

The methodologies employed by organizational education for research encompass the complete spectrum of classical research methods employed by the social sciences, the humanities and cultural studies, while additional and innovative approaches are also used. Most often, the choice of research method is based on a consideration of its suitability with regard to the subject and issue in question. Organizational education research does acknowledge though that the choice of method also necessarily (re)constructs the research object itself and that hence the interdependence of method and object is itself an issue when it comes to research practice.

#### *3.1 Theoretical, empirical, historical and comparative approaches*

- Organizational education research contributes to organization theory and more specifically to theories concerning organizational learning. In the development of organizational educational theory, processes and structures, as well as culturality and institutionalization are taken into account, while the learning potential of organizations and the options for providing support to organizational learning are analyzed. The theoretical approach used in organizational education differs from that employed in other related disciplines, such as organizational sociology, organizational psychology, management and administrative studies.
- Empirical approaches are commonly used in organizational education research; they include qualitative, as well as quantitative and multimodal approaches. The method employed (i.e. qualitative, quantitative or integrative) is determined by the issue under consideration. Research into the patterns of organizational practice relating to the modes of organizational learning tends to take a qualitative approach while research looking at the effectiveness of different development measures will employ a quantitative method. Methodical and methodological innovation is increasingly being seen in organizational education research as new research and evaluation designs are developed.

- An historical approach is the preferred method when it comes to analyzing organizational or organizational-contextual developments over long periods of time. Historical research in organizational education focuses on the continuity, change and demise of organizations within the context of societal change and, at the same time, places emphasis on the relevance of organization aspects within the historical process. In this case, the history of ideas and social history, psychological studies and discourse genealogies are among the techniques employed for research.
- Moreover, comparative approaches are becoming increasingly important. Comparative methods are derived from theoretical, empirical and historical approaches that are not only relevant to the research of processes, structures and practice patterns within the cultural and societal context in organizational education. They can also be useful when it comes to comparing the processes of learning in different types of organizations (e.g. administrative bodies, corporations and non-profit organizations).

### 3.2 *Participative, processual, aestheticizing and creation-oriented research approaches*

- Organizational educational methodologies use participatory approaches and use and reflect the potential of action research. Of relevance here are the connections between formation, transformation and research. Given the double orientation of action research, challenges and implications of this technique are analyzed and reflected upon.
- As learning itself is a process, something it has in common with the process of organization, educational organization research takes into account chronological factors. This means that there is a major focus on process-oriented research methodologies and research designs. Longitudinal study approaches are a desideratum in educational organization research.
- Similarly, the facet of aesthetics is growing in importance in the context of organizational research. The ‘aesthetic turn’ we have witnessed in political thought now invites us to analyze organizational aesthetics as this is represented in the form of artefacts and institutional rituals, rifts and practices. In addition analysis of organizational aesthetics and art-based research can be employed for the analysis of organization and change. Organizational creativity and design research take the form of methods such as performance- and theater-based approaches, collaborative creative interventions and workshops, creative development scenarios and participatory large-group events. The development of research methods is continuing and these will be explored and utilized in future organizational education research.