

Organisational Knowledge Transfer: Turning Research into Action through a Learning History

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Abstract: Organisational learning and knowledge management experts are searching for more appropriate research tools to tackle the difficult concepts of organisational learning and knowledge. This paper provides an overview of the learning history methodology, first proposed by Kleiner and Roth, in studying knowledge transfer activities. The learning history methodology, typically used within an action research environment, is designed to allow recognition of what has been learned in the past to guide stakeholders in the dialogical generation of a new future. It is a qualitative measurement tool of what has been learned, and remains sensitive to contextual factors, since it is based on the perceptions of the organisation's actors and the theoretical sensitivity of the researcher. This paper surveys the learning history literature to determine the roots, benefits and challenges of this research method. We will then demonstrate the advantages of using this approach to studying organisational knowledge transfer by presenting a case study where it is being used within participatory action research logic. Finally, we will provide lessons learned from our ongoing research and draw on implications for practice and future theorising.

Keywords: knowledge transfer, learning history, organisational learning

1. Introduction

Organisations of all types are struggling to learn how to survive in a dynamic environment of increasing complexity. This requires that organisations employ mechanisms to reflect collectively on their experience, make sense of it and assess their investment in learning efforts (Roth and Kleiner 1998). When asked what topic will have the greatest impact in the future of organisational learning (OL) and knowledge management (KM), a panel of experts nominated "research methods and measures of OL/KM" (Easterby-Smith and Lyles 2003). These experts are searching for more appropriate tools to address learning and knowledge concepts, both difficult to tackle. Some suggest a greater utilisation of empirical research designs and qualitative research methods that are sensitive to contextual factors, such as narrative methods, to better understand processes related to organisational learning and knowledge management (Scholl et al. 2004; Easterby-Smith and Lyles 2003). Until now, few ideas have been presented on how to improve learning from experience and how to capture and disseminate knowledge in organisations. Many efforts at helping organisations learn have failed because the skills necessary to make effective OL/KM interventions, such as reflection and dialogue, are difficult to master and do not always provide organisations with effective solutions to promote learning and solve their business problems (Cross and Rieley 1999). Employee surveys, best-practice reports, traditional case studies and the use of consultants are all tools that fall short in

helping organisations reflect collectively on past experience in a way that helps them to prepare for future actions (Farr 2000). Meanwhile, the use of stories for helping organisations learn and transfer tacit knowledge is gaining widespread favour among both practitioners and academics (Cortese 2005; Sole and Wilson 2002; Royrvik and Bygdas 2002). Narration is increasingly seen as the privileged form for constructing and expressing one's personal stories, and organisations are viewed as narrative artefacts (Cortese 2005; Klein 2005).

The learning history methodology, typically used within an action research environment and designed to allow recognition of what has been learned in the past to guide stakeholders in the dialogical generation of a new future (Bradbury and Mainemelis 2001), seems to address the needs of the OL/KM experts cited earlier. However, few authors have demonstrated the potential of this qualitative research methodology in studying knowledge management, and more particularly, knowledge transfer activities. This paper discusses the use of this new action methodology, the learning history, to study knowledge transfer initiatives. It is intended for both scholars and practitioners who want to explore new ways to study knowledge and learning concepts. First, we present an overview of the learning history literature to determine the roots, benefits and challenges of this research tool. We then demonstrate the advantages of using learning histories to study knowledge transfer by presenting a case study where it is being used within participatory action research

logic. Finally, we provide lessons learned from our ongoing case studies and draw out implications for practice and future theory.

2. Overview of the learning history methodology

First designed to help pilot projects transfer their learning to other parts of an organisation, the learning history is a qualitative research methodology that considers human perceptions, actions, opinions and evaluations (Cortese 2005). It was created in 1994 at MIT's Center for Organisational Learning in response to the needs of organisations to engage in collective reflection. Some see this narrative method as a qualitative measure of knowledge (Greco 1999) or as a knowledge management tool, especially effective for managing personal and context-specific tacit knowledge (Milam 2005). The learning history also qualifies as inductive research, since researchers are not trying to prove or disprove starting hypotheses. The naturalistic/constructivist perspective is used to capture and construct stories by collecting data from a wide group of people (Milam 2005).

Inspired by Van Maanen's (1988) ethnography tool, called the jointly told tale, the learning history document is a 20- to 100-page narrative of an organisation's recent critical episodes, presented in an engaging two-column format (Bradbury and Mainemelis 2001; Kleiner and Roth 1997a). The right-hand column presents an emotionally rich story of relevant events through the interwoven quotations of people who took part in them, including champions and sceptics, people who were affected by them, or people who observed them up close. The left-hand column contains the learning historians' analysis, which identifies recurrent themes in the narrative, asks questions about its assumptions and raises "undiscussable" issues. The content of the left side of the document is based on recognised research in the areas of systems thinking, organisational effectiveness and organisational behaviours (Cross and Rieley 1999). Once written, the learning history document is disseminated through group discussions with people who were involved in the change effort and others who might learn from it. Thus, a learning history is as much a process as it is a product (Roth and Kleiner 1995a). It brings tacit knowledge to the surface, codifies it and turns it into an actionable knowledge base (Kleiner and Roth 1996). More generally, the learning history "is inspired by belief that legitimate or valid knowledge results from an emancipatory process, one that emerges as people strive toward conscious and reflexive emancipation, speaking, reasoning, and

coordinating action together, unconstrained by coercion" (Bradbury and Mainemelis, 2001, 352).

2.1 Disciplinary roots of the learning history methodology

Roth and Kleiner (1995a) state that the learning history draws upon theory and techniques from ethnography (to understand the realities of organisation members from their points of view), journalism (to present the story in an accessible and compelling way), action research (to guide new actions through reflection and assessment of learning efforts), oral histories (to describe history with narratives) and theatre (to disseminate narratives that are often emotionally charged). Taking a systems view of organisations, the learning history methodology starts with a premise that all individuals are actively trying to do their best and that feedback to compare what was accomplished to what was expected is necessary to sustain any improvement process (Roth 2000). However, the learning history process differs from most evaluation approaches, where the only feedback people get is from an expert's assessment (Roth and Senge 1996).

The learning history can also be viewed as an intervention methodology, positioned in the field of action research at the organisational level of analysis (Coghlan 2002), and more precisely along the lines of participatory action research, since the research is co-designed and co-developed (Bradbury and Mainemelis 2001). The learning history methodology builds upon organisational culture research by using insider/outsider teams who take on the role of learning historians (Roth 2000). Insider/outsider research is particularly useful when the research goal is to generate rich appreciation of immediate or unfolding situations grounded in participants' experiences, or to convey the beliefs and assumptions held by participants (Louis and Bartunek 1992). In contrast to a traditional research approach where researchers collect and analyse data without the participation of people in the organisation, insider/outsider research encourages ongoing dialogue and heterogeneous interpretations, which can result in more robust theorising (Louis and Bartunek 1992). While the outsider searches for knowledge that can be generalised to many situations, the insider wants to develop knowledge for practical use. In that sense, insiders and outsiders complement each other and foster a better understanding of the ways that organisational members make sense of their world (Louis and Bartunek 1992). Furthermore, the insider/outsider team links expert evaluation to the organisation's own learning efforts (Roth and Kleiner 1995a).

2.2 Benefits of the learning history methodology

For researchers, the learning history methodology helps make their work available to the larger community of scholars and practitioners (Bradbury and Mainemelis 2001) and contributes to the body of generalisable knowledge about what works and what doesn't in management (Kleiner and Roth 1997a). Learning histories also generate a lot of information on an organisation's way of learning, which acts as an ongoing resource, spinning off other documents, training programs and learning tools (Roth and Kleiner 1995b) and facilitating future research (Jacques 1997). For participants, the learning history is a collective and inclusive process (Farr 2000) which produces positive social change (Bradbury and Lichtenstein 2000). The group discussions favour collective reflection and help people openly express their fears, concerns and assumptions, which builds trust and a sense of community because people feel they are not alone in their efforts to improve the organisation (Kleiner and Roth 1997a). It also shows them that their views count (Farr 2000). For example, in one organisation, the learning history forced senior managers to recognise their teams' stress levels and accept their recommendations concerning the staffing process for future project organisation (Cross and Rieley 1999). Another positive element for participants can be the narrative interviews, where they recall the learning experience and often find that they have "learnt again" through the process (Cortese 2005).

The learning history is also a new qualitative way of measuring organisational improvement efforts without killing their learning value (Kleiner and Roth 1997b), since it allows people to tell their story without fear of being evaluated (Roth and Kleiner 1995a). The process is regarded as safe by participants (Farr 2000) and opinions are made discussible in a concrete way because they refer to observable data (Bradbury and Mainemelis 2001). According to Argyris (1990), these conditions facilitate reasoning, which in turn favours learning. For example, Kleinsmann and Valkenburg (2005) used the learning history methodology for their case study on learning through collaborative new product development and found that it is a means of identifying learning opportunities as well as a structured and transparent way of analysing case study data.

2.3 Challenges of the learning history methodology

Bringing this type of tool into organisations can be a revolutionary enterprise. The learning history dissolves hierarchical privileges and favours

conversations that create meaning and common objectives to guide future organisational actions (Roth 2000). In this context, researchers do not always get the necessary support from the organisation. Even if organisations agree on the importance of organisational learning, they may not be willing to invest the time, courage and honesty it requires (Roth and Kleiner 1998). For example, some executives are reluctant to undertake a learning history because of its cost, both in employee time and consulting/research fees (Parnell et al. 2005). Also, building an insider/outsider collaboration may require some time, since insiders often lack the necessary research skills and require training (Louis and Bartunek 1992). Furthermore, in a business culture where action is glorified, managers often find it difficult to take the time to reflect (Roth and Kleiner 1998) under the pressures of delivering results, serving a political agenda, identifying problems and finding solutions (Milam 2005). In this context, to get the most out of the learning history process, the organisational climate has to welcome contradictions, uncertainty and conflict as learning opportunities (Milam 2005). If the organisational context does not favour a transformational learning approach, the learning history can set off flames that burn up the organisation's good will and resources (Roth and Kleiner 1995a).

Participants' responses to learning history documents are not always positive. Managers and consultants who promote learning efforts are often disturbed by what the learning history actually uncovers (Kleiner and Roth 1996). Dissatisfaction is more visible when people learn and become aware of the gaps between their aspirations and their corporate reality (Kleiner and Roth 1997b). However, that is exactly where learning histories have their value: in their capacity to bring out multiple perspectives that make visible to an organisation what is collectively hidden (Roth 2000), such as psychological and emotional problems faced during a transformation effort (Milam 2005). In that sense, learning histories are like mirrors to organisations. They raise issues that people want to talk about but have been afraid to discuss openly (Kleiner and Roth 1997a). The learning history text also brings forth contradictions between suppressed and better known voices, as well as between the way things are supposed to be done and actual practices (Bradbury and Mainemelis 2001). To deal with these challenges, learning historians have to find the right way to bring out the issues of the story without blaming anyone (Kleiner and Roth 1996). Indeed, the process of collectively reflecting and assessing the learning history sometimes goes against people's expectations that senior

management should tell them what to do (Roth 2000). Researchers have to continually negotiate practitioners' involvement in the learning history (Bradbury and Mainemelis 2001).

Conflicts about the meaning and causes of organisational events can also arise within the insider/outsider research team (Louis and Bartunek 1992). The team must be able to discuss these conflicts openly and not rely on compromises, which would result in poor research or even the dissolution of the team. It is also crucial to ensure that no particular perspective is over-represented in the insider/outsider team. Another challenge of the learning history methodology is related to its two-column format, which must be formatted carefully to avoid reader confusion (Coghlan 2001). For researchers, who are not used to telling the story through the voices of other people, the format can be difficult to master. Researchers are also faced with the challenge of creating an engaging text for a range of people with different learning styles (Bradbury and Mainemelis 2001). For their part, managers would like a more prescriptive document, one that includes more synthesis, analysis and recommendations (Kleiner and Roth 1996). All in all, the two-column format needs further testing, because experience with it is limited. The next section of this paper will demonstrate the relevance of using learning histories to study knowledge transfer activities by presenting a case study of a project developed by the Knowledge Transfer Research Laboratory at the University of Sherbrooke, where the learning history was used within a participatory action research logic.

3. Case study: Using a learning history methodology

The team for this knowledge transfer project came together in 2003 and included researchers and administrators in workplace health and safety from a rural Anglophone province, administrators in workplace health and safety research from a combined urban and rural Francophone province, and a team of business school researchers in workplace design and knowledge transfer from the same Francophone province. This multi-disciplinary team included expertise in sociology, psychology, systems thinking, political science, ergonomics, health and safety. The team's activities focused on interdisciplinary research and knowledge transfer (KT) in workplace health and safety (WHS). The project pivoted around a partnership between three founding organisations.

- The Community Research Alliance for Marine and Coastal Workplace Health and Safety in Atlantic Canada (SafetyNet), funded by CIHR, based at Memorial University in St. John's

Newfoundland and linked to partner organisations and researchers in Newfoundland and Labrador, other parts of Atlantic Canada, Québec, Ontario, the United States and Europe.

- The Institut de recherche Robert-Sauvé en santé et en sécurité du travail (IRSST) in Montreal, the largest independent WHS research institute in Canada. And
- The Chaire d'étude en organisation du travail (CÉOT) in the Faculty of Business Administration at the Université de Sherbrooke, in Sherbrooke Québec.

The role of the project was to enhance interdisciplinary research and KT capacity related to workplace injury research. In using a learning history methodology, the team aimed to tell the story of the project in a case study that was true to the experience and perspectives of all participants. They also intended to use the learning history to track the project milestones for reporting purposes. Finally, and perhaps most importantly, they wanted to stimulate and inform conversation on what actually happened, why it happened and how the team could learn from what had happened. In other words, they hoped to do as Houshower (1999, iv) suggests and "go far beyond a post audit review of a project, digging more deeply into the motivation and passion of those involved in the endeavour." The team began by framing the project within a participatory action research logic. In participatory action research, people in the organisation or community actively participate with the researchers throughout the research process, from initial design to the final presentation of results and discussion of their implications. They thus engage actively in the quest for information and ideas to guide their future actions. Participatory action research is usually described as cyclical, with action and critical reflection taking place in turn. The reflection is used to review the previous action and plan the next one. Participatory action research is very useful when used across different organisations, with participants who come from varying environments and are involved in diverse activities.

3.1 Bridging theory and practice

Traditionally, theory is an attempt to answer the question of why a specific phenomenon occurs (Sutton and Staw 1995). Why do people get involved in one project and not another, why do people become influenced, why does conflict happen and get resolved. But a theory that tells us why a phenomenon occurs, does not really tell us *how* it occurs or even more importantly, how we can create, develop or deter that phenomenon. According to Friedlander (2001), to turn theory

into practice, we must ask how. To make practice into theory, we must ask why. The practitioner tends to ask how; the researcher tends to ask why. But it is the integration of the how and the why which will result in a holistic, systemically enriched and useful practice-theory. For example, to understand how we can reduce conflict adds to our knowledge of why conflict gets reduced; and to understand why conflict is reduced contributes to our knowledge of how we can reduce it. The learning history methodology provided the vehicle for the team to capture in the participants' own words what took place, why it took place and how they perceived what took place. The learning historian's role was assumed by a research professional with the KT Laboratory. The learning historian with the use of a learning history protocol covering the basic topics to be addressed conducted the retrospective interviews. The actual interview process for the learning history began early in the second year of the five-year project.

In all, six senior members from the partner organisations participated in the first phase of the learning history. These participants represented a multitude of different backgrounds in terms of language, culture, geographic location, education level, responsibilities, needs and objectives. These differences proved to be at times complementary and at other times conflicting and were brought to the forefront by the learning history. For example, some members of the group were focused on knowledge transfer, others on health and safety, others on financing to ensure survival of their group, etc. The fact that the partners occupied different positions on their organisational life cycles also added to the diversity of perspectives present within the project. To capture the differences in these backgrounds, we needed to develop a good understanding of the differences between theory and practice. The participatory action research logic allowed us as a group to begin to address the issues of how and why certain conflicts happened during the project. The focus of the team was solely on the project-related activities of the participants, which are distinct from regular operations because they involve "doing something which has not been done before and which is, therefore unique" (Project Management Institute 1996, 5). By focusing in on the unique nature of the project, we could separate the participants' regular work from the exploration work associated with a new project (March 1991).

From the outset, some of the project's participants only partially bought into the learning history. For example, everyone saw it as an appropriate vehicle for tracking the "hard" facts and project events for reporting purposes. But the "softer"

opportunities of stimulating and informing conversations on what happened, why it happened and how future action could be improved were less obvious to some of the team members. Nonetheless, the team decided to continue with the learning history.

3.2 Outcomes of the learning history

The method of analysis used for this learning history was to examine, categorise and tabulate the data gathered in order to identify project milestones, including learning milestones. In general, such an analysis consists of developing a descriptive structure of the project on the basis of the theoretical propositions guiding the study (Yin 1997). The objective is attained when we have an adequate narration of the facts and circumstances surrounding the project. As the project got underway and interviews took place, the learning historian began to suspect significant differences in perspectives from the three partner organisations. As the initial learning history document began circulating amongst participants, it became clear that project objectives and the needs of the three partner organisations varied considerably. These differences surfaced in two separate ways. The first was when the director of the KT Laboratory at the Université de Sherbrooke used the learning history to help develop a case report on the progress of the project and submitted it to the six partners persons interviewed, asking them to look at it and become co-authors. At the request of the funding agency, the case contained activities that had gone well (success stories), others that had not gone as well (horror stories) and still others that were more neutral in their impact (non-events). The reaction by the co-authors from one of the partner organisations was rapid and decisive and clearly reflected different opinions about what had taken place thus far, including different ontological predispositions to theory development, network development, knowledge transfer and the development of capacity for action. The conflicting interests were significant enough to delay the decision to move ahead with the proposed case until the authors could meet in person to discuss the project's progress.

The second indication that the project was experiencing difficulties came at the third annual project meeting where the differences between the groups began to generate tension. One group felt that they were being blamed for project misfires, and accused the other two groups of not pulling their weight on the project. It was obvious to all those involved that more time had to be devoted to addressing the differences raised in the learning history. At that meeting, there was a realisation that the entire group was confronting

the difficulty of achieving “hard” results (transferring high quality research results and programs from one Canadian province to another) through an emphasis on concepts that many people termed “soft” (good communication, openness, honesty and trust, networking, relationship building). After two days of, at times constructive, and at times conflicting conversations, the team concluded the meeting with a more aligned understanding of what everyone was trying to accomplish. They also agreed to go ahead with an improved version of the case. Had the group not had the learning history to bring these tensions to the fore, it is not unrealistic to assume that they would have remained dormant until much later into the project, when in all likelihood it would have been too late to deal with them. The learning history was also very useful in developing the mid-term project report required by the project sponsors.

4. Lessons learned

Some of the most significant learning’s to come out of this experience include:

- The need to obtain clear and early buy-in by all participants of a learning history methodology;
- The usefulness of the “hard” aspects of a learning history for project reporting purposes;
- The contributions of the “softer” aspects in stimulating and informing conversations on what happened, why it happened and how future action can be improved;
- The ability of the learning history to raise significant issues that need to be addressed for the project to deliver the expected results.

For this project, the learning history helped focus attention on differences within the groups which then had to be addressed using participatory action techniques. Since the learning history was part of participatory action research logic, the group had a good combination of tools and techniques to help them resolve issues and adjust the project focus. The factors that helped the project team get realigned included the fact that the project was sponsored by an independent group or community and was directed toward the discovery of information about an issue of community concern. The process was also aided by a facilitator, resulting in empowerment of the community of people involved. This project is now in the second half of the five-year commitment and the combination of learning history and participatory action research have contributed significantly to improving how the team functions. Many obstacles still remain to be overcome but participants now feel they have the appropriate knowledge, trust and tools to continue to develop

and improve the way they work together. Some of those obstacles include the time commitment required by both the learning historian and the project participants. They found that a learning history requires considerable time and effort to develop and keep up to date. They also found that the closer to real time the history is developed and shared, the more opportunities it provides for the group to change and improve performance before the end of a project. While considerable, the time investment in a learning history is far outweighed by the value of the knowledge it generates.

Because of the perceived value of the learning history and participatory action research methodology in this first knowledge transfer project, the team decided to repeat its use in another project with a different set of partners. The general objectives are similar to those of the first project, but in addition, this project involves the transfer and adaptation of a highly successful management philosophy developed in the US health care industry, called "Putting Patients First", to a healthcare setting in Quebec, the Centre de Réadaptation de l'Estrie (CRE). This learning history is an open-ended story about one organisation's (CRE) journey toward proactive humanisation of patient care and management practices. It is also intended to provide additional lessons about project learning and improvement for readers in the organisation and for others wishing to undertake a similar journey. The Government of Quebec and the CSN, the labour union representing CRE employees, sponsor this pilot project. Although this project is in its early stages, the researchers have already begun to apply some of the learning's from the first learning history project. For example, they have been careful to make certain that everyone involved buys into the methodology; that a list of “noticeable results” or “hard” facts are included in the interview protocol to link interviewees' interpretations to observable data; and that the interviewing and dissemination phases are close together in time to allow the learning history to have the best impact possible. They are also more prepared for difficult issues that may surface during the learning history process. The experience with the first project has strengthened our commitment to the value of conversations as a resource to help resolve conflicts among project members.

5. Conclusion

This paper has provided an extensive overview of the learning history methodology. We presented the roots of this new approach, its benefits and the challenges related to its use. This overview will help researchers and practitioners that are

new to the learning history methodology become acquainted with its origins, goals, advantages, limits and appropriate contexts while learning what conditions are necessary to ensure its success and validity. This paper has also contributed to empirical research by presenting a case study where the learning history methodology is being used to study knowledge transfer activities within participatory action research logic. This project conveys many lessons. The first lesson learned is the need to obtain clear and early buy-in by all participants of a learning history methodology (through information sessions or other means). Second, “hard” aspects of a learning history can be very useful for project reporting purposes, while the “softer” aspects serve as opportunities to capture participants’ perspectives and stimulate conversations on what happened, why it happened and how future action can be improved. Third, the closer to real time the history is developed and shared the more opportunities it provides for the group to change and improve performance before the end of a project. Even

though a learning history requires considerable time and effort to develop and keep up to date, the time and energy invested are far outweighed by the value of the knowledge generated. Although the learning history provides a fresh and effective way to study learning and knowledge concepts, it is still at an experimental stage. The potential of this new methodology in studying knowledge transfer activities has not been fully explored. The limitations are primarily those associated with the amount of work involved in a developing a learning history. More empirical research is necessary to demonstrate its effectiveness in studying collective learning processes and knowledge transfer initiatives.

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