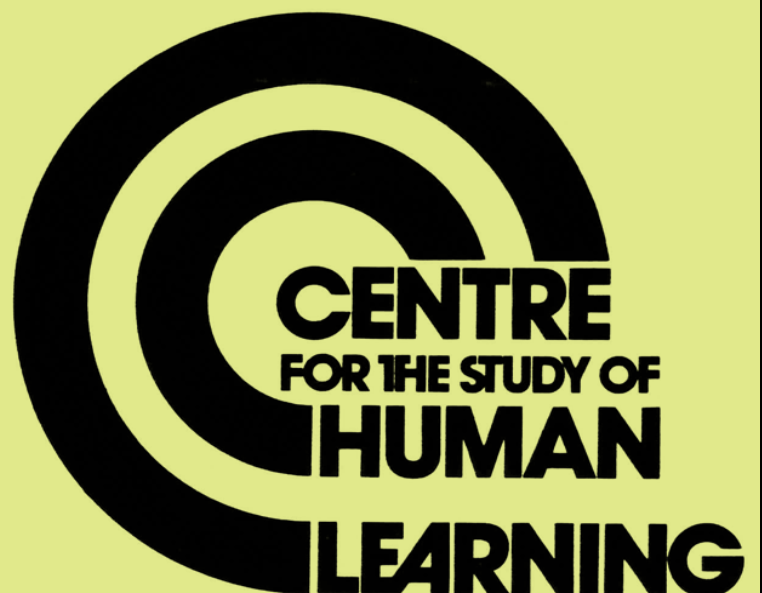# Conducting Learning Conversations with an Organisation

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A PAPER ON CONDUCTING LEARNING CONVERSATIONS WITH AN ORGANISATION

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Conducting Learning Conversations with an Organisation

1. **Some Introductory Remarks about Objectives and Values**

1.1 This paper is based upon work carried out in the Trustee Savings Bank of Birmingham and the Midlands. The Bank was formed in November 1979 and its constituents did not operate extensive education and training arrangements. The history of the Trustee Savings Bank of Birmingham and the Midlands's Education and Training Department is therefore less than three years and most parts of its work are still in their early stages. The observations contained in this paper are consequently untested and offered merely for discussion; additionally i.e. are not necessarily the views of the Bank's management.

1.2 Because of its newness the Education and Training Department is faced with two types of objective when engaging in projects within the Bank:
(a) those to do with establishing the basis of working relationships;
(b) those to do with the problem being tackled.
The former are to do with defining the nature of the department's contribution to the Bank's functioning. In learning conversational terms this constitutes the basis of the learning contract between the Education and Training Department and its clients within the Bank. The latter objectives naturally vary from case to case and the example considered in this paper is the introduction of a managerial performance appraisal scheme.

1.3 In pursuing its objectives the Department can adopt one of two stances:
(a) a contingent approach in which solutions to problems are developed by those responsible for carrying out the work, but with assistance of trainers when needed;
(b) an absolutist approach in which 'expert' or 'authoritarian' solutions are sought or recommended because of their apparent reliability and utility, and where the trainer is the possessor of the appropriate expertise. In most cases, and certainly in the case of the appraisal scheme, the former is adopted.

1.4 The crucial objectives are of course those of 1.2(b). But it can be argued that they in turn partly revolve upon 1.2(a) and 1.3(a). The successful achievement of project objectives, in the author's view, depends upon the achievement of these prerequisites which by their nature are necessarily long term in their realisation.

1.5 By operating in this way one is seeking agreement about what training is, what a Training Department should do, and attempting to establish the view that people can find their own solutions, and that these are not inferior to the "ideal" solutions that are often alleged to exist. In adopting such a course one has necessarily to accept that management may elect to continue to operate in their preferred way and in which case the trainer's role must be to make it aware of the operation consequences of the chosen way of working.

1.6 In trying to establish and operate a broad-based learning contract - a task still not satisfactorily completed - the experience within the organisation is that one meets very determined resistance to change a well established and narrow definition of training (which seems widespread in British Management). The view of training adopted in Trustee Savings

Bank of Birmingham and Midlands's Education and Training Department is that: "training is any attempt to organise ways and means of helping people to learn to do that which is required of them".

2. The Introduction of Managerial Performance Appraisal

2.1 The Bank consists of a Head Office and 114 branches, linked by an operational management team. Line management is supported by a series of administrative departments dealing with personnel matters, finance, audit, systems, marketing, and purchasing/property.

2.2 The District Managers took up their jobs shortly before the introduction of the appraisal scheme. The division of responsibilities was that Personnel Department were to control 'the operation of the scheme', Education and Training would look after its introduction. The work with the District Managers was spread over 15 months. The stages involved were:-
(a) Setting appraisal in the context of managing. This focussed on an exploration of managing in their terms using the CSHL Structure' of Meanings exercise. The emphasis was on getting the purpose of appraisal right, seeing it as merely a formalisation of a natural managing process rather than an imposition of a new task and hoping for it to be treated as a serious activity that would be influential in the Bank's manpower development work.
(b) Achieving consistent and fair judgment. With 6 appraisers and 114 appraisees this is a difficult task. Repertory grid (managers as elements, and effective management as the theme) was used to collect constructs which were distributed across the 12 assessment factors of the appraisal scheme. These were then elaborated by the group as a whole and detailed observational frameworks for each factor produced. An agreed and explicit basis for rating performance was established without altering the nationally agreed assessment factors.
(c) Reviewing the performance of the appraisers. This was a detailed feedback of results covering both ratings given and comments made. In the second case scales were derived from the comments which perhaps best illustrates the review process. All the comments for one assessment factor (e.g., 'meeting of objectives') were grouped and categorised and for each category a positive and negative scale set out. These scales/categories were then used by the group to determine (i) if their own comments ranged over all categories, and (ii) whether or not their comments were equally positive and negative. The results of the review were used to re-emphasise purpose and extend the instrumentation and seek to reduce differences in ratings brought about by personal standards, and constituted a detailed examination of the process of appraising.

2.3 The changes that came about were grouped around three things:-
(a) accepting the purpose of appraisal as being primarily to assist with bringing about needed current job performance improvements by abandoning the view that appraisal was merely the furnishing of a record of whether or not an employee was good at his job;
(b) taking it seriously instead of seeing it as yet another chore to be carried out to satisfy central administration - seeing it as a culmination of a series of assessments so as to .provide
(i) the basis on which training action would be taken and-"
(ii) reliable manpower planning data;
(c) developing a broader view of the District Manager's role in relation to their responsibility for the development of subordinates, and encouraging them to pose any kind of problems and seek help with solutions rather than pose problems only when they are aware of a possible solution to them.

3. Some Observations about Reactions to Change.

3.1 The Learning Contract - Expectations about Contributions. This has proved a very difficult subject to deal with, and is still not completely resolved. Superficial aspects are naturally straightforward, but provide a focus for anchoring long-held, deeply entrenched assumptions about the nature of human nature and the part that learning plays in life. These are held so strongly that discussion of other possibilities is precluded. This leads to a sense of alienation, borne out of bewilderment of the client at the trainer's actions which are outside of the client's model of training. The progress towards understanding and acceptance of a complete learning contract within the organisation between trainer and management seems inevitably to be slow, with the necessity for painstaking attention to each opportunity for raising awareness about alternative roles and courses of action.

3.2 Characteristics of Resistance to Change. At each stage of the exercise there was evidence of a strong desire to cling to a personal viewpoint and considerable imagination used to support it and find arguments against proposals. This resistance seemed to be borne out of suspicion of anything that was not demonstrably practicable in their terms. The characteristics of this practice vs theory dimension led to the conclusion that in order to make progress certain conditions had to be satisfied, namely:-
(a) the use of conclusions from collected data in favour of recommendations or opinions based upon other evidence;
(b) the testing of ideas in action other than argument about relative merits of differing theoretical frameworks;
(c) dealing whenever possible with concrete terms rather than abstractions;
(d) acceptance of small gains over a period of time rather than seeking an immediate absorption of a complete theoretical representation of an issue;
(e) it was necessary to accept a loss of scientific purity or rigour in order to maintain momentum and progress;
(f) maintenance of plain language rather than complex expressions.

3.3 The Applicability of the Learning Conversations Framework. There was no doubt that the introduction of the appraisal scheme went through phases exactly equivalent to life, tutorial and learning to learn conversations. Initially, attention was on why this activity should be carried out.What benefits would arise? What would it cost to carry it out? Which seems similar to a typical life conversation. A student may question the wisdom of his choice of subject for study; a manager will consider the security and value of current ways of doing things and question the wisdom of doing something else. As the enterprise was pushed into action and gained momentum emphasis changed to how things work - the technicalities of the operation need to be mastered in order to work the new system - and tutorial conversations naturally take place. Finally, when looking at differences in performance the question of how the activity is carried out is inevitably raised - in essence a learning to learn conversation is required in order to restructure the performance of the skill. All of which thoroughly justifies the view that learning conversational technology is not restricted to academic studies but is a viable frame of reference for diagnosis and planning of attitude change or examination in industrial training situations.

4. Tentative Conclusions about Interacting with Groups in an Organisation for the Purpose of Change.

4.1 The Need for a Suitable Theory of Change: It seems possible that there is a variety of theories of the change process - what it is, how it can be facilitated, what its problems are - and perhaps there ought to be as many theories as there are types of change? What became clear in this case was the need to understand the participants' responses to change and to work in accordance with what was valued by them. In so doing, three things emerged as the main components of an approach to change facilitation.

(a) Negotiating the obvious. To anyone well versed or skilled in an activity all his thoughts and actions are 'obvious'. They have been found to be the most appropriate way; the most logical, effective strategy for executing the task. The action is of maximum impact, at minimum discharge of energy, straightforward and matter of fact, apparently spontaneous and natural. This is not the case to the uninitiated and great care is needed to ensure that a communication block does not arise because of a failure on the part of the 'expert' to fully appreciate the difficulties faced by the novice in exploring and selecting appropriate ways of operating.

(b) Operating at appropriate levels of meaning. It appears to the author that personal meaning can be considered at three levels, namely, dispositional (creating in the individual through physiological factors tendencies to produce particular kinds of meanings), regulatory (confirmed and relatively permanent meanings that establish how the individual operates under all kinds of circumstances) and applicatory (highly specific, enabling meanings that are heavily environmentally based and which can change quite frequently according to needs). If this approach to meanings is valid then change is best brought about by dealing with regulatory meanings rather than contrasting meanings at the applicatory level, and the resistance to change in this case confirms this view.

(c) Moving in the direction of personal control and shared sense of utility. Participants were most uncomfortable or resentful when things were outside their control or not deemed by them to be useful. Acceptance of new things increased if one could move in the direction of increasing self-control and an increase in the persons valuation of utility No doubt there are other dimensions involved but these two were particularly pronounced and very soon brought into play, especially that of utility, which sometimes brought an immediate block to progress because of unwillingness to discuss anything considered at first sight to be impractical.

4.2 The Need for a Broad-based Interaction Strategy. There are three elements: philosophical; scientific; pragmatic. All our enterprises need to be well-grounded, soundly designed activities and the scientific method appropriately used meets this requirement. The trainer particularly meets criticisms that question his creditability and naturally there is concern in training circles to ensure that a professional, thorough, validated approach to their work is adopted. But this by itself is insufficient, albeit an essential to effective working. In helping others to learn and thereby bring about change we are necessarily directly involved in social exchange in which philosophical and pragmatic considerations play significant parts: philosophical in the sense that beliefs about the nature of man and what is possible for him must be shared; pragmatic in the sense of being opportunistic, flexible and in tune with the politics of the organisation, even at the expense of scientific purity and rigour.

4.3 The Need for a Method to Help with Change. Experiencing change forces the individual to learn. Enhanced learning competence ought therefore to better equip the individual to cope positively, smoothly and effectively with change. Awareness of and ability to improve learning competence do not seem to be easily acquired and are often in short supply. It

therefore seems sensible to be able to offer a model of learning competence especially as a diagnostic for helping the individual chart his progress towards greater capability. The model is that of the self organised learner which for the author covers four areas or types of skill:

(a) initiating and coping;

(b) individual, task specific;

(c) organising or strategic;

(d) controlling and directing.

The self organised learner will be effective in all skill areas, but typically considerable bias is shown by individuals in their inclination towards one area or another. The model is easily dealt with intellectually but there are considerable problems when introducing it to individuals to help them cope with change, which so far have not yet been resolved.