

## **Forum for organisational learning: combining learning at work, organisational change and training in new ways**

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### **Abstract**

*A new initiative has been taken that aims to combine learning at work, training and organisational learning and change. In this “Forum for organisational learning”, scientists, organisational advisors and practitioners cooperate in new ways in order to reach new goals: improving organisational learning, workplace learning and training and especially their alignment. In the Forum organisations meet each other in order to learn from their experiences with individual, team and organisational learning. Each organisation is represented by at least two and preferably three or more representatives, fulfilling different roles. Some, the thinkers, follow a full master program. Others, the do-ers, follow only part of this program, but work within the organisation focusing on organisational learning and workplace learning. Finally, in each organisation there is a responsible manager who sponsors the internal organisational process. In the program, 5 paradoxes of learning form the core content: How to combine top-down and bottom-up approaches for strategy formation, how to combine learning and working, how to combine individual and organisational ambitions, how to combine structure and empowerment in leading teams and individuals and how to combine motivational approaches with approaches directed at resistance reduction.*

### **Introduction**

In a master program called Management of Learning and Development, we focused (since 1986) on the role of managers and HRD-officers in transforming organisations into learning organisations (Simons, 1995). The program, prepared participants for eight new roles:

*1) facilitating individual learning in the different kinds of learning environments.*

This role consists of helping people in organisations to learn in different kinds of learning environments. This means a change from the development and execution of formal training to the support of learning on the job and learning outside of jobs and courses, like in open learning centres. Moreover, it means a shift from external control of learning to other kinds of control of learning, like in divided control, self-control and problem control. It is a shift from teaching to learning and from learning to development.

*2) Training and supporting (other) line managers in their role of coach and steward.*

Because learning will take place at the workplace coached by the line manager, these last people should be supported in helping their employees to learn. Teaching line managers to become a coach is more than just teaching them a new role, it means teaching them a new view of management.

*3) Integrating learning in new technology and the electronic high way: e-learning.*

Computers and other new media (like CD-ROMs; video) have tremendous possibilities for new forms of learning, not only in separate computer assisted instruction and multimedia approaches, but also integrated in existing software. Since more and more people are working with computers, their learning will take place integrated in their computer-work. Moreover, the electronic highway brings all kinds of new opportunities for learning and networking.

*4) facilitating team learning.*

Team learning ability is an important part of learning organisations. Few specialists, however, know how to stimulate and support team learning. A learning team is not only learning

collectively, it is also functioning in new ways (for instance different kinds of communication)

*5) facilitating organisational learning.*

Similarly, also new roles in stimulating, organising and supporting organisational learning will be needed.

*6) teaching how to learn at the individual, team and organisational levels.*

When more and more people, teams and organisations will be learning, also the need to develop learning abilities will grow. Thus, new roles will be teaching how to learn at these three levels.

*7) guarding and nurturing the alignment of the three kinds of learning.*

As stated above, the alignment of the different kinds of individual learning and the alignment of individual, group and organisational learning form key features of learning organisations. New roles will develop with respect to these forms of alignment.

*8) focusing on long-term development of all members of the organisation.*

Apart from roles with respect to short-term learning, also new roles related to long-term development are important. Masters of learning and development can use and develop tools like learning contracts, assessment methods stressing learning and development; career guidance tools and personal development plans.

The new roles are based on an explicit model of learning (see below) that functions also as a model for the learning of the participants themselves: they are expected to develop in the direction of a real “community of learning” and to develop learning abilities. Moreover, the meetings are not considered to be the only places where learning takes place. Instead all kinds of self-directed and work-related learning are integrated. Participants are expected to organise these kinds of learning themselves, either in groups of course participants or with other people in their organisations or in their network. Some new didactical procedures that have proven to be successful in the program over the years are:

- \* Regular integrative reflections: participants discussing the key messages of a lecture or learning activities amongst themselves without interference by the lecturer or process-facilitator. In these reflective periods also relations with previous modules and advance knowledge are discussed, preventing that students isolate the new information too much. Furthermore, students discuss what is new in the lectures and learning activities, facilitating in this way generalisation. Some students who tend to believe that there is never anything new discover what others find new. Finally, students discuss the conditions and possibilities of application in practice. Participants report that these integrative reflections make them experience how to learn effectively.
- \* Collective reporting: participants make a group report of all meetings, ensuring a kind of collective memory. In this way they have to agree on the essentials and to write better and better readable reports. Several feedback-cycles prove to be necessary before such a report is acceptable. Participants report that this helps them to write better summaries for themselves too.
- \* Obligatory intervision groups: all participants are obliged to participate in a small intervision group (3 persons). Intervision groups meet at least once a month outside of the master program meetings. Private and job-related problems are discussed in these small informal groups as far as they relate to the program. Especially, problems in applying the new roles in the reality of work are discussed.
- \* E-mail and internet-communication between sessions: each participant is connected to the internet and there is a special a collective database (at first Lotus Quick Place later on Black Board Course Information) for easy communication about assignments, homework, literature, the collective report, intervision, thesis etc.

- \* Active didactical procedures: lecturing periods are confined to one hour as a maximum. At least half of the program consists of working groups, workshops, discussions and other more active forms of participation. Special new didactics consist among others of reflective practicum's, focusing on reflection in action, reflective laboratories, trying out new behaviours in a safe environment, simulation games, expert interrogation, problem based learning, action learning, action research, company visits, authentic testing in front of outside experts.

Although the program has been very successful over the years both in terms of business success and in terms of evaluation by the participants and their organisations, we felt more and more dissatisfied with the impact it had on organisations. The participants changed and learned a lot, but the influence on organisations remained limited. Many participants left their organisations, many became dissatisfied with the lack of change of their organisations, many started their own new businesses, many decided to cooperate with other participants in starting new approaches. In other words, the impact on organisational learning remained below our expectations.

Of late, we therefore started a new master program that is embedded in a "Forum for organisational learning". This aims to bridge the gap between individual learning and organisational (and team) learning. The basic change in comparison with the previous program is that we will not work with individuals but with organisations that are represented by members of the organisation forming a community of practice within the organisation. The idea of this Forum will be described below. Before that we will present the theory of learning that lies behind both the old and the new program and the approach of the Forum.

### **Learning in learning organisations**

In studying learning in organisations, one soon discovers that there are three levels of learning: individual learning, group learning and organisational learning. Traditionally, educationalists focused on individual learning through training and business scientists tended to study organisational change and strategy. Recently, however, both the educationalists and the business scientists discovered learning at the workplace and organisational learning. The two cannot, however, exist without each other. There is, in our view, no organisational learning without individual learning and individual learning needs organisational assistance and the context of organisational learning to be effective. Some so called learning organisations stress the organisational learning. Others focus on team learning and still others on individual learning. It is the combination and coordination of the three kinds of learning however, that, in our view, makes an organisation a learning one, ultimately. In the concept of learning organisations this combination of perspectives, so we believe, is a key success factor.

What is a learning organisation? A learning organisation is an organisation that is able to change quickly. This means that the people forming the organisation are able to change and learn quickly, both collectively and individually. Bomers (1989) defined learning organisations as organisations that aim to extend their learning-ability at all levels and continuously in order to optimise their effectiveness. Extending a little on this, we propose as a definition of a learning organisation:

*An organisation that aims to extend and to relate the learning and learning abilities of individuals, groups and the organisation as a whole in order to change continuously at all three levels in the direction of existing and possible wishes and needs of customers.*

Three levels of learning and learning ability were discerned above: the individual learning (ability), the learning (ability) of groups and the learning (ability) of the total organisation.

These three will be discussed briefly in the next paragraphs, as well as alignment of these levels of learning.

## **ORGANISATIONAL LEARNING**

Can organisations learn or are individuals the only ones able to learn? Of course the answer to this depends on the definition of learning. Learning is often defined as relative permanent changes in behaviour or behavioural dispositions that can be attributed to learning activities and / or processes (Boekaerts and Simons, 1993). In this sense organisations can only learn in a metaphorical sense. They learn when they change their organisational behaviour and behavioural dispositions and undertake learning activities. A problem is that organisational learning, though discussed frequently, has not been defined too well. We propose to have one definition for individual, group and organisational learning. Instead of posing the question whether organisations and teams can learn according to an individual definition of learning, we propose to change our definition of learning in such a way that organisational (and group) learning may be included. We define learning as: *The undertaking of activities (consciously and unconsciously) by individuals, groups and organisations that results in relative permanent changes in the knowledge, skills and attitudes of individuals, in work processes and in organisational cultures and structures of groups and organisations.* In all levels of learning we discern 4 key components of a learning arrangement: learning goals, learning strategies, measurement of learning and feedback (including reward and judgement). Our program is based on the organisational learning cycle described by Dixon (1992; 1994). She reviewed the literature on organisational learning and presented an overview of five factors contributing to the learning of organisations.

- a. *Acquisition of knowledge / information*
- b. *Sharing of knowledge / information*
- c. *Constructing meaning*
- d. *Organizational memory*
- e. *Retrieval of information*

Recent research in the field of organisational learning shows an increasing interest for the creation and distribution of knowledge in various communities of practice (e.g. Bolhuis & Simons, 1999; Reinmann-Rothmeier & Mandl, 1999; Wenger, 1998). There is specific attention for non-formal learning processes and tacit knowledge being acquired in professional work (Eraut, 1998, 2000). Nonaka & Takeuchi (1997) stress the importance of exchanging experience and mental models between workers in order to create new collective knowledge. This process of knowledge creation does not get enough attention in the Dixon model and forms an important extension of it.

### **Team learning**

What are the main characteristics of group learning and group learning abilities? As said before, team learning is an important level in the learning organisation. Team learning is more than the sum of all individual learning. It is collective learning, resulting in changes in group rules and group norms, or with other words in the group memory. Thus there are two levels of collectivity: collective team learning processes and collective team learning outcomes of learning. Both can be both implicit and explicit, resulting in four kinds of team learning: implicit processes and implicit outcomes; implicit processes with explicit outcomes; explicit processes with implicit outcomes and explicit processes with explicit outcomes. The collective outcomes of team learning can be: collective implicit knowledge, collective explicit knowledge, collective ideas (practice theories), collective competence, collective critical

reflections, collective action plans and actions; collective publications. There can be team-learning goals: changes in-group functioning where the group is heading to or new collective competences the team is striving for. Also there can be feedback on team learning (as distinguished from feedback on team functioning). Groups can be striving to develop collective competence. This means that they are not dependent on the availability of individual members and that they exchange information: when one group member learns he / she tries to exchange that learning with the other members. Group learning has also to do with support for individual learning, in the sense that people:

- create opportunities to learn
- stimulate each other to learn
- help each other to integrate learning skills in work
- give each other feedback and rewards for learning
- help and support each other while learning

Team learning also means having and creating good communication between team-members. Mostly, small multi-functional, autonomous teams function in such a way that people learn from each other, taking over and learning each other's jobs flexibly.

To support these team-learning processes Wenger (1998) points out the emergence of communities of practice within organisations. 'A community of practice is a group of people informally bound by a shared practice related to a set of problems [...] they typically solve problems, discuss insights, share information, talk about their lives, and ambitions, mentor and coach on each other, make plans for community activities, and develop tools and frameworks that become part of the common knowledge of the community. Over time these mutual interactions and relationships build up a shared body of knowledge and a sense of identity. They constitute an informal, social structure initiated by the members and reflect on their collective learning (Wenger, 1999, p. 4). We like to make a distinction between communities of practice (that learn around a common practical interest) and communities of learning that have no common practice, but see learning as their common interest).

### **Individual learning**

What can be said about individual learning and individual learning ability? In most discussions of learning organisations (for instance Argyris, 1990; Swierenga and Wierdsma, 1990) the concept of individual learning ability needed in learning organisations remains rather unclear. We propose a 3 x 4 typology of learning. The one dimension of this matrix is a categorization of places where people are learning by combining the categorisations of De Jong (1991) and Van der Zee (1991), that focus on work-place learning, with a categorisation of off the job learning (both in school-like situations and elsewhere off the job) (Simons, 1994). Therefore a trichotomy is to be preferred: at work – in training and elsewhere. Our second dimension distinguishes external control, divided control, learner control and problem control. In external control a pedagogical or workplace authority has total control over learning goals, learning activities and testing. In divided control, learners have control over some of these aspects (goals, activities and testing). In learner control learners control all of these three aspects (goals, activities and testing). In problem control, learning is a side effect of working, problem solving, without there being any intentions directed at this learning, neither in the minds of outsiders nor in the learner him or herself. Perhaps people know that they are learning or have possibilities of learning, but they do not know what it is they (can) learn from the activities they are executing. This leaves 2 dimensions defining twelve types of learning (see Figure 2).

	formal training in / course	at the workplace / on the job	elsewhere (at home / in library / in open learning centre / at conferences
external control			
divided control			
self-control			
problem control			

The system of twelve variants of learning (environments) can be used to describe some characteristics of learning and learning ability at the individual level. We expect the following changes to be necessary for organisations aiming to become learning organisations, all implying *a shift from teaching and training to learning* (see also Simons, 1993; Simons, van der Linden & Duffy, 2000).

*a) More workplace learning*

People can no longer learn all they have to learn through courses and in schools. There is so much to learn that integrated learning and working becomes a necessity.

*b) More learning outside courses and jobs*

Employees will be expected to learn at home and in open learning centres.

*c) More divided control over learning*

People will have to learn in environments where they work and learn together with others who have some say over their learning (cooperative learning) and in situations where trainers and managers define only a part of their learning (for instance the goals or the measurement) and all other components of learning may be chosen autonomously. Here, the same key-assumption is that people perform best when there is an optimal combination of autonomy within clear boundaries and constrictions. This means that the rules that determine learning possibilities should be as clear as possible. But within these rules, as much autonomy as possible in making decisions about ones own learning should be allowed and rewarded.

*d) More self-controlled learning*

Employees will be expected to learn and study on their own.

*e) More problem controlled learning*

More and more it becomes clear that people learn easily and are happy with learning situations where they are not aware that they are learning. Learning, then, is a side effect of working and problem solving. This does not mean, however, that these working and problem solving situations will occur automatically. They can also and perhaps should be organized. It seems that variability, opportunities for responsibility, reflection, feedback, innovation and autonomy are six aspects of situations that facilitate problem-controlled learning (Onstenk, 1997; Simons, Germans & Zuylen, 2000). Furthermore, measures should be taken to ensure that learning remains possible, because task goals tend to get priority and to dominate learning goals.

*f) More learning to learn*

We need at least three kinds of learning-skills: referring to learning that is totally or partly determined by someone else (formal-learning skills), referring to self-controlled learning planned and controlled by the learner him- or herself (autodidactical learning skill) and referring to implicit learning that is a side effect of working or problem solving (problem

controlled learning skills). Some of these skills have been described by Candy (1991) and extended by Van der Hoeven-van Doornum and Simons (1994). Formal learning skills refer to accepting control by others, to deep learning strategies, question asking, problem solving, reading and information seeking. Autodidactical learning skills have to do with - rather domain-specific skills of - self-management, personal autonomy in learning, action control, subject matter autonomy, metacognition and motivational skills. Implicit learning skills concern reflection, feedback, transfer, generalization and openness for possibilities to learn. Similarly, we think that there are three independent kinds of learning readiness: being ready to be educated, being ready to learn on your own and being ready to profit from autonomous learning experiences. In line with Candy (1991) we assume that these learning skills and this type of learning readiness have a rather domain-specific character. Thus, we do not expect - as was done in prior research - that these skills and attitudes are of a general quality nor that they automatically transfer from one domain to another. Further research should make clear how domain-specific these skills and attitudes are and how transfer could occur.

#### *g) Alignment of the different kinds of individual learning*

A major problem for learning organisations will be to bring the different kinds of learning in line with each other. They should ideally strengthen each other instead of opposing. Learning projects can be created consisting of combinations of different kinds of learning. Furthermore, as was discussed above, individual, group and organisational learning should be aligned.

### **Alignment of the three levels of learning**

As stated above, the combination and interrelations of the three levels of learning (organisational, team and individual) form the core problem for organisations that strive to become a learning organisation. Alignment of learning goals at the three different levels thus is a main problem to be solved. The following principles, so we assume, make this alignment possible. Alignment of goals will result from a clear influence of customer wishes and market developments (the external context) on learning goals at the three levels. There are four sources where goals can come from: from the environment, from individuals, from groups and from management. The alignment ideal is that these sources all point in the same direction. Furthermore, individual goals will fit into group and organisational learning goals when there is a combination of a certain sense of autonomy and freedom to choose one's own goals and clear guidelines at the group and organisational level. It should also be possible that group and organisational goals follow from individual goals, as is an influence of group goals on organisational goals. This means that there is a combination of strict but broad boundaries / constrictions and as much autonomy as possible within these boundaries / constrictions.

Measurement of success in learning is very important at all three levels because this makes clear whether the organisation, group and individuals are learning continuously. Besides, it brings the opportunity for benchmarking: comparison of results with other companies, groups and individuals in effectiveness, which leads to a search for possible causes of differences in activities and strategies. Based on the measurement improvement of activities becomes a real possibility. Moreover, feedback to goals and activities as well as rewarding of good learning successes becomes possible.

Leadership for learning at all three levels is an important leadership task, involving the four aspects of a learning process: taking care of alignment of goals and creating clear guidelines with ample room for autonomy; helping to find and design learning activities, organising an objective measurement system and providing feedback and rewards for learning.

## **Forum for organisational learning**

As a follow-up of the above described master program management of learning and development we decided to start cooperation with a large Consultancy Firm Twynstra Gudde Management Consultants. Together we developed a new meeting and learning place that we call "Forum for Organisational Learning". This Forum aims to make participants in the master program better connected to their own organisational and team learning through an active involvement of at least one other and preferably 2 or more other participants from the same organisation. These three or more representatives form a Community of Practice (Wenger, 1998), whereas the participants in the master program (as well as other subgroups in the Forum) form Communities of Learning. Each Community of practice gets a Coach who helps them develop as a community and who helps with the implementation of changes in the organisation. The participants in the program fulfil three different roles in the Forum. Some, the thinkers, follow the full master program. Others, the do-ers, follow only part of this program, but work within the organisation focusing on organisational learning and workplace learning. Finally, in each organisation there is a responsible manager who sponsors the internal organisational process and participates in about 10 % of the sessions. In this way we hope to get more organisational and team learning in the organisations involved than we reached in our previous program, as well as better alignment. Apart from the individual certification through the Master title, organisations can try to get certificates too. For instance they can try to get the Investors in People certificate or a certificate that states that they have a high quality Corporate Academy. Furthermore, we hope to prevent the phenomena with respect to individual careers as described above. Not only individual participants commit themselves, their organisations should do this too through various kinds of learning contracts and active involvement of a team of representatives. Moreover, we hope to help different kinds of organisations to learn from each other discussing their experiences with individual, team and organisational learning.

In the Forum for Organisational Learning, many other activities are planned besides the master program and the communities of practice working on their implementation activities. These other activities refer to new forms of cooperation between and new learning opportunities for scientists, organisational advisors and practitioners aiming to reach new goals: improving organisational learning, workplace learning and training and especially their alignment. Furthermore, there are activities around research, for instance a community of learning consisting of practitioners preparing a PHD. Moreover there are activities for alumni, for consultants, for corporate academies, etc.

The master program consists of 12 sessions of three day meetings organised in 5 modules. The first module consists of three sessions focusing on change ambitions of the individuals and the organisations involved. Topics are change management, collective and individual ambitions, learning organisations, networking, communities of practice and of learning, etc. The second module (2 sessions) treats organisational learning. The focus is on organisational learning, coaching, core competences, learning histories, a.o. Then follow modules (2 sessions each) on team learning and on individual learning. In the sessions on team learning minicompanies, autonomous teams, networking and team-empowerment form key topics. In the individual learning sessions, learning on the job, self-directed learning, coaching and implicit experiential learning are emphasised. The final module consisting of three sessions aims to put it all together, stressing alignment and system theories. Topics are people management, knowledge management and competence management.

In the program, 5 paradoxes of learning form the core content: How to combine individual and organisational ambitions, how to combine top-down and bottom-up approaches for strategy formation, how to combine structure and empowerment in leading teams and



individuals, how to combine learning and working and how to combine motivational approaches with approaches directed at resistance reduction. For each of these paradoxes / dilemma's we try to find ways to have the best of both worlds: how to combine the strengths of both sides of the medal.

An important aspect of the process of learning is an inquiry learning model consisting of 6 steps. The inquiry process always starts with existing practices: making tacit knowledge and skills explicit, integrating the perspectives of the various actors (managers, technicians and executive personnel). The second step is the formulation of a working model based on the tacit knowledge from the first step combined with a diagnosis using diagnostic tools in forms of action research. A first formulation of change ambitions results. In the third step these models and ambitions are investigated from scientific perspectives: using theoretical, empirical and critical forms of learning and inquiry. In this way the working model is studied from different scientific perspectives (psychology, sociology, economy, information science). Probably some variants of the working model and the ambitions will result. The fourth step is making an accountable choice for one of the models / ambitions, using the information and perspectives gathered in step 3. The fifth step of the inquiry-learning model consists of the design of an implementation trajectory: how to implement the changes. Here too various ways to reach results are studied. The final step is the actual implementation in the organisation.

To summarise, the Forum tries to find alignment of learning, implementation and change of individuals, groups and organisations in a network of scientists, consultants and practitioners and a network of as heterogeneous as possible organisations bringing together working, consulting, learning and investigation. The new roles of managers and HRD people that were the focus of our first master program (described in the introduction) are now integrated in a better-integrated network and extended with roles with relation to networking and implementation. The focus shifts from staff to line managers.

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