Beyond Facilitated Learning Network Structures - An Exploration of Evolving Learning Communities in the Micro-Firm Tourism Environment

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Declaration

The author hereby declares that, except where duly acknowledged this thesis is entirely her own work.

Signed: _____

Leana Reinl,

July 2011

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Dedication

This thesis is dedicated to my mother and in memory of my aunt Rose.

Abstract

Facilitated networks are regularly cited in the literature as a means to promote sustainable competitive advantage in small tourism firms. These networks function for a variety of reasons including marketing and innovation; however learning networks specifically seek to encourage learning among entrepreneurs. Once established, the question remains whether such networks can transition from facilitated cooperative learning strategies to become independent learning communities in the longer term.

Little is known about the formation, maintenance or success of these types of learning relationships after facilitated learning structures and supports reach a conclusion. What is known is that these networks, labelled 'Evolving Learning Communities' (ELCs) by the author, are devoid of formal structures and consequently autonomy in their structural and relational reasoning is required.

This research sought: *to explore the elements and relationships that influence individual learning in Evolving Learning Communities, once facilitated learning supports reach a conclusion.*

A comprehensive review of the literature revealed a number of key themes that were incorporated into a model of ELC learning. The ELC model maps the micro-firm owner/manager's learning development, from the autonomous business setting to the facilitated learning network environment and on to the independent learning network arena, illustrating the evolution of a learning community.

From an interpretivist philosophical position, a longitudinal interpretive case study method incorporating sub-studies for the purposes of cross-validation sought to establish the potential of an ELC situated in the South West of Ireland, to transition from a Facilitated Learning Network (FLN) setting to an independent learning community. Supporting research techniques comprised observation, interviews, on-going ELC communication review and reflective diary maintenance.

The key contribution of this research is the development of an ELC model, which explains the elements and relationships that influence learning at individual, sub-group and community level. The findings suggest that independent learning communities face quite unique learning and development challenges and require quite specific learning supports as a result. As such, the development of the ELC model was a legitimate research exercise.

This thesis concludes with a chapter outlining the study's contribution to the existing body of knowledge, its research limitations and recommendations for further research.

'In a social process, together people bend, spin, consolidate, and enrich their understandings. We come to know what has happened partly in terms of what others reveal as their experience' (Stake, 1995).

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List of Abbreviations

CoP: Community of Practice

DOI: Depth of Involvement

ELC: Evolving Learning Community

FI: Fáilte Ireland

FITLN: Fáilte Ireland Tourism Learning Network

FLN: Facilitated Learning Network

HRD: Human Resource Development

IOL: Inter-Organisational Learning

LEADER: Liaison Entre Actions pour le Development d'lEconomie Rurale

LMI: Learning Membership and Identity

LNA: Learning Needs Analysis

NOM: Negotiation of Meaning

OL: Organisational Learning

RBV: Resource Based View

TBDP: Tourism Business Development Plan

TLN: Tourism Learning Network

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Glossary of Terms

Absorptive capacity: The ability of a firm to add value, assimilate and apply new knowledge (Cohen and Lenvinthal, 1990). From an organisational perspective it encompasses the firm's overall capacity for learning but it extends further than learning capacity and incorporates: *'implementing new knowledge, disseminating new knowledge internally and making use of new resources, including new technologies. Absorptive capacity is a function of the organisation's existing resources, existing tacit and explicit knowledge, internal routines, management competences and culture. In entrepreneurial SMEs, it is likely that this will be largely reflected in the development, experience and motivation of the owner/manager and key staff members'* (Gray, 2006: 347). As such, absorptive capacity encompasses more than the learning of the individual owner/manager.

Adult learning: The transformation of experiences into knowledge, skills, attitudes and values (Illeris, 2003).

Anchor: To achieve deeper levels of learning; deepening what has been learned by utilising an individual's learning style preference.

Clusters: Groups of firms in the same industry, or in closely related industries that are in close geographical proximity to each other.

Communities of Practice (CoP): A group of people who share a passion for something that they do and learn how to do it better as they interact (Wenger, 1998).

Coopetition: From a tourism perspective, businesses work mutually through a combination of individual competition and collective cooperation, to promote tourism destinations and products (Brandenburger and Nalebuff, 1997; Michael, 2003; Tinsley and Lynch, 2007).

Evolving learning community (ELC): The term ELC is used throughout this research to refer to a collective of individuals that group together for the purpose of learning and business development after facilitated learning network support ends.

Group learning: The process of aligning and developing the capacities of a group/team to create the results its members truly desire (Senge 1990).

Human Resource Development (HRD): In its broadest terms Human Resource Development (HRD) is concerned with facilitating the learning of individuals, teams and organisations through the design and structuring of the organisation of work itself (McGoldrick et al., 2001).

Inter-firm alliance / alliance: A voluntary arrangement among firms that exchange or share resources and engage in the co-development or provision of products, services or technologies (Gulati, 1995).

Individual learning: A learning process taking place in isolation but not necessarily without teacher direction and structured activities (adapted from Gorli (2003)).

Inter-organisational learning: A collective acquisition of knowledge and skills acquired through interaction in an inter-organisational network (Halme, 2001).

Inter-organisational network: A network of individuals and groups, from multiple organisations that engage together for the purpose of learning and business development.

Knowledge Management: The ability to transfer learning and act on it (Gray, 2006; Shaw and Williams, 2009). Like learning, it has explicit (easily codified and transferred) and tacit (less formalised and harder to interpret and transfer) dimensions (Polyani, 1958).

LEADER: A Rural Development Programme part-funded by the European Union, launched in 1991 by the then Commissioner for Agriculture, Ray MacSharry. LEADER funding is administered by local groups with responsibility to distribute grants and other supports to rural development projects within their geographical area.

Learned helplessness: This occurs where the learner becomes reliant on facilitated learning network supports and ownership of the learning process is not assumed. While certain learning structures in FLNs act as learning enablers, other supports can reinforce behaviour such as learned helplessness, which is counter-productive to individual and collective learning. Due to the unique constraints that impact the micro-firm learning process outside of the network environment, and considering the FLN objective is ultimately learner autonomy, learning network facilitators need to find an optimum

intervention level where the balance between learning broker reliance and autonomous learning can be maintained (Reinl and Kelliher, 2010), in order to minimise the risk of learned helplessness in these networks. If this occurs, the learning momentum may be lost as soon as the facilitation ends.

Learning: An evolving form of social participation within a community of practice wherein learners move (in centripetal direction) from legitimate peripheral participation in a field of mature practice, to full participation as learning identities are engaged (Lave and Wenger, 1991).

Learning broker: Individuals that facilitate learning (Holden et al., 2006; Iles and Yolles, 2004; Lave and Wenger, 1991), guide pro-active learning behaviour and assist others to identify and leverage learning opportunities.

Learning capacity: See absorptive capacity above.

Learning communities: There are a variety of different learning communities. Learning networks are one example; others include business networks, inter-organisational networks, formal training and development courses and other weak tie / informal network groups. These groups are sometimes referred to as communities of practice (CoP). The learning contexts relevant to this research study are: the micro-firm environment, the facilitated learning network (definition provided above) environment and the ELC environment. These learning communities are discussed in detail in the thesis.

Learning Needs Analysis (LNA): In an FLN setting, a LNA is typically designed and administered by a management/academic support team. It provides a gauge of participant learning needs that permits the management/academic support team to tailor training to those needs. Typically, a LNA captures current knowledge levels on various business topics and skills across a number of functional business areas.

Learning set: A learning group of individual network members that share experience and knowledge and work on local tourism development projects. Characteristically, these sets comprise six to eight micro-firm owner/managers from a particular geographic area.

Legitimate peripheral participation: A term used to denote a stage of learning development (Lave and Wenger, 1991).

Micro-firm learning network: A review of relevant literature[1] affords the following definition of a '*micro-firm learning network*': a socially constructed learning environment that enhances individual learning and business development through cooperative learning strategies that facilitate learning relationship development, resource sharing and learner autonomy (adapted from: Reinl and Kelliher, 2010: 142).

Micro-firm owner/manager learning: This term is used throughout this research to describe micro-firm owner/manager (individual) learning and the application of that learning back in the micro-firm environment.

Network (verb): To *network* is: to mobilise relationships and learn from other members of the network (Lynch and Morrison, 2007).

Networks: Networks are voluntary arrangements between firms for the purpose of coopetition rather that competition (Fuller-Love and Thomas, 2004).

Network learning: Network learning is identifiable through changes to network practices, structures and interpretations. Network learning outcomes are therefore characterised by changes in network systems (Knight, 2002).

Organisational learning (OL): OL provides the means to harness all forms of learning within the organisation, it primarily equates to owner/manager learning in the micro-firm setting due to the central role assumed by the owner/manager in the business. However, as a concept, it incorporates more than the learning of the individual, encompassing the notion that individual learning is extended to other members within the organisation (Beeby and Booth, 2000; Chaston, Badger and Sadler-Smith, 2001; Halme, 2001).

Paradigm: A world view governing people's thinking and action. It includes for example people's values, judgements, norms, standards, frames of reference,

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[1] See Table 4.1 for a comprehensive reference list

Psychological contract: A term used to describe '*individual beliefs shaped by the organisation regarding the terms of exchange between individuals and their organisation*' (Rousseau, 1995: 9-10). Typical components of the contract include but are not limited to: job satisfaction, remuneration, development, loyalty and recognition. The psychological contract is not formalised by contract agreements, reward or endorsement systems, it is underpinned by trust between the parties involved. In its simplest terms, a psychological contract refers to the time, resources and effort put in to a task and what is expected in return (Reagans and McEvily, 2003).

Resource-based view: The resource-based view (RBV) of the business relates to the resources required by the business to compete and develop in the environment (Duhan et al., 2001). Development is achieved by nurturing the core competencies of the business (Prahalad and Hamel, 1990). Advocates of the RBV view the firm as a sum of tangible and intangible resources that are leveraged to create organisational capabilities (Almor and Hashai, 2004; Aragon-Sanchez and Sanchez-Marin, 2005).

Resource poverty: A term used to describe the resource poor environment that the micro-firm owner/manager operates in.

Reflective practice: Reflective practice involves the thoughtful consideration and critical analysis of an individual's actions and experiences with the goal of improving professional practice (Johnson and Geal, 2005).

Reflexivity: This concept is used in the social sciences to explore and deal with the relationship between the researcher and the object of research (Brannick and Coghlan, 2007).

Reflexive practitioner: Someone who reflects back over their work / learning at regular intervals. Through reflection the practitioner can relate what has been learned back to their business environment, achieving deeper levels of learning.

Reification: The conversion of an abstract concept into something concrete. This is a key term in the community of practice learning perspective (Wenger, 1998). Objects produced by the community encompass the experience and understanding of learners

(Wenger, 1998). Examples include a process for carrying out tasks or roles, a company logo and/or a mission statement for a group or enterprise.

Self-directed learning: In its broadest meaning, self-directed learning describes a process where individuals take independent control of their learning, diagnose their learning needs, formulate learning goals, identify human and material resources for learning, choose and implement appropriate learning strategies, and evaluate learning outcomes (Knowles, 1975). Or as Candy describes, it is '*the independent pursuit of learning outside formal instructional settings*' (Candy, 1998: 1033).

Social capital: Resources (including knowledge) embedded in social relationships that can be leveraged by an individual to add value to their business.

Tourism Business Development Plan (TBDP): A business development plan was utilised in the Fáilte Ireland Tourism Learning Networks programme (see appendix A) as a learning and business development tool. It covers a number of key business functions that link training and learning on the TLN programme back to actionable outcomes in the individual's micro-business. This TBDP is submitted with other key learning documents for assessment and accreditation of learning.

Micro-firm (definition): The European Union (EU) defines a micro-enterprise as one that employs no more than ten full-time employees (EU, 2005). The terms micro-enterprise, micro-business and micro-tourism business/firm used in this research study equate to the EU definition. For a more comprehensive definition see section 2.2 (p. 16).

Chapter One

Introduction

1.0 Introduction

This chapter provides the rationale for conducting this research on the elements and relationships that influence learning in evolving learning communities.

The chapter presents the background to this research study and locates it within the literature. Existing research in relation to micro-firm learning communities is outlined and relevant research gaps are presented.

Finally, the structure for the remainder of the thesis is outlined.

1.1   Research background

In rapidly changing and increasingly competitive business environments, micro-business owner/managers are encouraged to seek out potential learning and development opportunities through membership of learning communities (EC, 2006; NCEO, 2006). The attractiveness of coopetition (see glossary) and collaborative learning is evident in the micro-business literature (Florén and Tell, 2004; Greenbank, 2000; Kelliher et al., 2009) and this is also the case in tourism research (Ahmad, 2005; Ateljevic, 2009; Ateljevic and Doorne, 2004; Gibson and Lynch, 2007; Halme, 2001; Morrison et al., 2004; Tinsley and Lynch, 2007, 2008). Micro-firm cooperative learning relationships are the subject of increased academic interest (Bottrup, 2005; Brown and Duguid, 1991; Florén and Tell, 2004; Morrison et al., 2004; Toiviainen, 2007; Kelliher et al., 2009) and international studies acknowledge the value of collaborative learning in the network environment (Chell and Baines, 2000; Devins et al., 2005; Down, 1999; Gibb, 1997; Hannon et al., 2000; Lynch, 2000; Morrison et al., 2004; Reinl and Kelliher, 2010; Taylor and Thorpe, 2004).

Specifically, the literature provides evidence that facilitated learning networks (FLN) create opportunities for higher levels of learning (Florén and Tell, 2004; Kelliher and Reinl, 2011; Morrison and Bergin-Seers, 2001; Tell, 2000; Wing Yan Man, 2007) and demonstrates that the structures and relational processes within FLNs accelerate individual learning (Florén and Tell, 2004; Halme 2001; Lave and Wenger, 1991; Morrison et al., 2004; Kelliher and Reinl, 2011).

The core objective of learning networks is learner autonomy that can underpin future co-operative activity and business development among participants. However, little is known about the formation, maintenance or success of collaborative learning relationships after facilitated structures and supports reach a conclusion (Bessant and Francis, 1999). What is known is that Evolving Learning Communities (ELCs) are devoid of formal learning structures; consequently autonomy in their structural and

relational reasoning is required. The effective management and maintenance of such learning structures and relationships requires a level of learning competence, much like that described by Wing Yan Man (2007). Where a competence shortfall arises, ELC members must reach outside the boundaries of the learning community to providers of specialist knowledge. This research seeks to explore these challenges in an independent learning community setting.

This research draws from social learning theory, in particular the community of practice (CoP) perspective (Lave and Wenger, 1991; Wenger, 1998). The CoP perspective has achieved prominence in the literature on knowledge and learning in organisational and educational contexts but less attention has been given to this perspective in the network and learning network domain. Despite its relevance in the tourism context (Shaw and Williams, 2009) the CoP perspective lacks a notable presence in tourism literature.

Drawing from a growing body of research in the micro-firm milieu, particularly over the last decade (Devins et al., 2005; Garavan et al., 2007; Larsen and Lewis, 2006; Philipson et al., 2004; Thomas and Thomas, 2006; Vernon et al., 2003; Whaley, 2003) it is clear that micro-firms differ from their larger counterparts on a number of key business development and learning issues. These distinctions render most of the logic and theory derived from studies of larger businesses inappropriate when applied to micro-firms.

While previous research explored the FLN structures and relationships and their influence on individual learning, this research study aims to explore the elements and relationships that influence individual learning in Evolving Learning Communities (ELCs), once facilitated learning support reaches a conclusion. This study has a social learning orientation and the CoP perspective (Lave and Wenger, 1991; Wenger, 1998) forms the theoretical baseline for this research.

One of the key objectives of this research is to establish an ELC model that will map micro-firm owner/manager learning development, from the micro-firm setting to the FLN environment and on to the ELC arena, illustrating the evolution of the learning community over time. While previous research incorporates the notion of 'close others' and their impact on micro-business owner/manager learning (for example Devins et al., 2005) the authors note that the development of these relationships remain elusive over time and require further investigation.

Other researchers have modified models of learning in response to the growing prevalence of collaborative learning communities (see Beeby and Booth, 2000; Knight and Pye, 2005 for example) although the majority of these research studies are based on collaborations between larger businesses. Some researchers have extended the CoP framework, acknowledging the limitations of the CoP perspective in exploring management learning in networks (Haugen-Gausdal, 2008; Juriado and Gustafsson, 2007). This research study informed and validated the learning community model through an interpretivist approach that enabled the researcher to 'induct theory' (Eisenhardt, 2007) through the completion of a longitudinal case study.

To summarise, while there is a growing body of research that considers learning in a variety of different learning community contexts, to the best of the researcher's knowledge none have considered learning development from the micro-firm to the FLN setting and onwards to independent learning communities after facilitated learning supports end.

1.2 Overall aim and objectives

This research study aims to: *explore the elements and relationships that influence individual learning in Evolving Learning Communities (ELCs), after facilitated learning supports reach a conclusion.* The proposed research objectives (RO) are:

1. To explore the construction of the social and learning infrastructure in an evolving learning community;
2. To examine the development, maintenance and management of the learning relationships and structures in the case community over time;
3. To map the factors supporting and impeding individual and collective learning in the case community;
4. To refine the learning community model based on the research findings.

As outlined above, previous research provides evidence that FLNs accelerate individual micro-firm owner/manager learning (Florén and Tell, 2004; Halme 2001; Lave and Wenger, 1991; Morrison et al., 2004; Reinl and Kelliher, 2010; Tell, 2000). What is not known is how these learning structures and relational processes evolve in independent learning communities over time. This research explores the evolution of an evolving learning community situated in the South West of Ireland and maps the factors elements and relationships that support and impede individual and collective learning in this setting. To the best of the researcher's knowledge no study to date has considered learning in this type of ELC, particularly in the micro-firm environment.

1.3 Defining the facilitated learning network (FLN)

There are many taxonomies of networks throughout the literature. They take numerous forms and can be established for a variety of different purposes, within and between large multinational corporations or between small-firms. The network and learning literature reflects a broad spectrum of research interests and a multiplicity of theoretical bases are drawn from. Much network research has a structural emphasis (Granovetter, 1995 for example); others take a social capital / economic benefit perspective of network relationships. As stated previously, this research draws from the community of practice perspective and applies a social learning lens to the network and ELC arena in pursuit of the research aim.

Networking has been found to be a valuable programme element for entrepreneurs (De Faoite et al., 2003; Lean, 1998; Raffo et al., 2000). Previous research confirms the business development and learning value that can be gained from FLN participation (Halme, 2001; Hannon et al, 2000). The micro-firm owner/manager's over-reliance on informal networks has been reported in the literature, while successful entrepreneurs have been found to have a large network of 'weak tie' relations (Philipson et al., 2004). Over a decade and a half ago Shaw (1995) argued that if networks were socially constructed then learning might also be socially constructed. Recent research in the network context validates this observation (Florén and Tell, 2004; Halme, 2001; Lynch and Morrison, 2007; Morrison et al., 2004; Reinl and Kelliher, 2010) and throughout the literature networks are described as socially constructed sets of relationships (Johannisson, 1995; Lave and Wenger, 1991; Taylor and Thorpe, 2004), reinforcing the views of social learning theorists (Brown and Duguid, 1991; Lave and Wenger, 1991).

Networks function for a variety of reasons including marketing, innovation, research and development, however learning networks specifically seek to encourage learning development (Bottrup, 2005; Chaston and Mangles, 2000) and business development (Ahmad, 2005; Jack et al., 2004; Taylor and Thorpe, 2004). FLN structures and strategies are designed to enable and support the individual learning process (Florén and Tell, 2004; Halme, 2001; Iles and Yolles, 2004; Kelliher and Reinl, 2010; Morrison et

al., 2004) and assist owner/managers to leverage the value and benefits of network relationships (Fuller-Love and Thomas, 2004). From a social learning perspective, individuals build knowledge through interaction and observation in social contexts. FLNs reflect the objectives of their respective stakeholders (participants, academic support staff, business experts and facilitators) and effective networking (from a learning perspective) entails trust, engagement and a willingness to share experiences and learn from the experience of others. FLNs stimulate a cooperative learning ethos and a sense of community and identity (Lave and Wenger, 1991; Morrison et al., 2004) among their participants.

Learning networks play a vital role in combating resource constraints and resultant learning barriers in micro-firms, by providing a means for participants to leverage information and resources that would otherwise be unavailable to them (Chell and Baines, 2000; Julien, 2007; NCOE, 2006; Wincent and Westerberg, 2006; Witt, 2004), potentially resulting in improved management development and learning competence (Chaston and Mangles, 2000; Wing Yan Man, 2007) through processes that can be mapped on to the learning cycle (Bessant et al., 2003). This underpins the important assumption that if the collective resources (possessed by participating businesses within the learning network) can be leveraged and disseminated throughout the network, it will have a positive bearing on network success (Witt, 2004) and may improve individual business performance (Hannon et al., 2000; Jack et al., 2004; Schaper et al., 2005; Wing Yan Man, 2007).

Peer interaction is an important element of network-centred learning. Micro-business owners value informal peer learning and interaction (Greenbank, 2000). Much of this peer learning takes place tacitly and there have been requests in the literature to focus on this incidental and tacit form of small-firm learning (Curran et al, 1996). Tacit knowledge is difficult to leverage and phased learning supports are required in the FLN to assist the owner/manager to leverage this resource (Kelliher and Reinl, 2011).

The FLN that was the learning catalyst in the context of this research is the Fáilte Ireland Tourism Learning Network (TLN) situated in the South and South East of Ireland. A comprehensive background of the Fáilte Ireland TLN and a previous research study (Reinl, 2008) that explored micro-firm owner/manager learning in that environment is provided in appendix A. A more comprehensive description is also provided later in chapter seven (section 7.1, p.158).

1.4 Thesis outline and structure

Figure 1.1 below outlines each stage of the research process.

Figure 1.1: Thesis outline and structure

Research title

BEYOND FACILITATED LEARNING NETWORK STRUCTURES - AN EXPLORATION OF EVOLVING LEARNING COMMUNITIES IN THE MICRO-FIRM TOURISM ENVIRONMENT

Literature review   *Internal and external review*

1. The micro-firm
2. Learning & the learning process
3. Cooperative micro-firm learning communities
4. Irish tourism: The business environment

1. Observational data
2. Interviews
3. Archival records & email
4. Internal review
5. External review

-----*Preliminary ELC model*-------

------*Adapted ELC model*------

Research strategy

Case research rationale

Pilot study

Validation study 1   Validation study 2

Case research analysis

------*Micro-firm ELC model*------

(RO: 4)

The literature review consists of four chapters. The various stages of learning community evolution will be reviewed in the natural succession that they occur – from the micro-firm (chapter two) to the FLN (chapter three) and finally on to the ELC arena (chapter three).

The micro-firm is a unique learning environment and various internal and external features of the micro-firm influence learning, these are discussed in chapter two. Following that discussion, a conceptualisation of the micro-firm learning environment is presented that draws from a growing body of micro-firm research.

Chapter three explores learning and the learning process. Consideration is given to a range of different learning perspectives and the influences that impact the individual learning process. The social learning perspective is then outlined and discussed, drawing primarily from the CoP perspective and specifically, the work of Lave and Wenger (1991) and Wenger (1998). The limitations of this perspective are taken cognisance of in the context of this research. Finally a number of micro-firm learning contexts are outlined and discussed and a conceptualisation of an ELC is presented.

Chapter four explores the influence of the elements and relationships of the FLN and ELC settings on micro-firm owner/manager learning. The latter section of this chapter focuses on the sustainability and evolution of ELC's once facilitated learning supports end. Issues including role and identity evolution, the pursuit of shared meaning, resource challenges and varying levels of participation are discussed. Finally, a preliminary model of ELC learning is presented that illustrates the elements and relationships that influence learning in this setting.

The importance of context has been acknowledged in the literature review and chapter five considers the operating environment for Irish tourism businesses with a specific focus on learning support and micro-business development.

Chapter six describes the research framework that guided this study. Philosophical perspectives are discussed before alternative research methods are discounted. Justification of the pilot research design, along with the case selection criteria follows and the research approach is examined in the latter section of the chapter. Case design, selection criteria and research approach are outlined. Finally, issues relating to legitimisation are discussed before the study's significance is considered in the context of existing literature.

Chapter seven presents an interpretation and discussion of the research findings from the pilot and two validation cases. A profile of the case community is provided. The elements and relationships that influence individual learning in the ELC are then presented under each research theme. Based on these findings the author presents a refined model of ELC learning (Figure 7.4, p. 241), the key elements of which are discussed in detail.

Finally, chapter eight presents the core research outcomes of this study. Recommendations for future research and practice are presented. The limitations associated with this study are also acknowledged in this chapter.

1.5 Contribution and relevance

This research will have implications for evolving learning communities (ELCs) of the future. The development of a supporting framework that can be applied to facilitate deeper levels of learning in evolving learning communities could potentially increase business and learning development in participating firms. This research also has implications for policy makers that seek to nurture learner autonomy on facilitated learning network programmes and develop sustainable autonomous learner communities in the longer term.

Chapter Two

The Micro-firm

2.0   Introduction

The overall aim of this study is to explore the elements and relationships that influence individual learning in Evolving Learning Communities (ELCs) in the micro-firm environment. Taking the micro-firm as the departure point the chapter commences with an overview of micro-firm literature that enables the author to provide a definition of the micro-firm (section 2.2). Internal and external features of the micro-firm that contribute to its uniqueness from a learning perspective are then outlined. A conceptualisation of the micro-firm learning environment is presented that draws from a growing body of micro-firm research, particularly from a learning context. In the latter part of the chapter, an overview of the Irish micro-business environment is presented before the internal and external influences on micro-firm owner/manager learning are considered.

2.1 An overview of micro-firm literature

The differences between large and small firms have been well documented (see Greenbank, 2000; O'Dwyer and Ryan, 2000; Welsh and White, 1981, among others). These differences are even more pronounced in relation to the micro-firm sector (Whaley, 2003) and render most of the 'large-firm logic' and theory derived from studies of larger businesses, inappropriate when applied to micro-firms. Following numerous calls to study micro-firms in their own right (Devins et al., 2005; Matlay, 1999; Roberts and Wood, 2001), there is a growing body of research that has focused on a variety of micro-firm business and development issues. These include; growth and business development motivation (Greenbank, 2000; Reijonen and Komppula, 2007) the regulatory burden (Pratten and Lovatt, 2005; Stanworth and Gray, 1991; Vernon et al., 2003), barriers to innovation (Larssen and Lewis, 2006) and lack of homogeneity (Devins et al., 2005; Garavan et al., 2007; Kelliher et al., 2009). There is also an increasing body of micro-firm research set in the tourism context (Ahmad, 2005; Ahmad and Morrison, 2004; Ateljevic, 2009; Lynch and Morrison, 2007; Reijonen and Komppula, 2007; Tinsley and Lynch, 2008; Vernon et al., 2003) with several research offerings from an Irish context (Garavan et al., 2007; Thomas and Thomas, 2006). The research above, acknowledges that the micro-firm owner/manager operates within a business and learning environment that fundamentally differs from that of larger businesses.

Micro-firms are intrinsically different in terms of their structure, management processes and response to business issues that impact upon them (Kelliher and Henderson, 2006). In particular, two distinguishing features of the micro-firm are, the centrality of the owner/manager (Reijonen and Komppula, 2007) and a well reported lack of resources (Raley and Moxey, 2000; Philipson et al., 2004). These features influence growth and development (Perren, 1999).

The external environment is an arena mixed with threat and opportunity, wherein limited influence in the marketplace and at government level renders the micro-firm over-sensitive to changes in the business environment. External impulses are sometimes required to trigger internal development (Lundberg and Tell, 1998) and stimulate a forced learning dynamic within the micro-firm. On a positive note, there are many opportunities to enhance learning and development in the external environment, including membership of learning communities. Participation in effective learning communities can assist the owner/manager to overcome learning barriers and leverage relational capital to enhance learning and development.

2.2 Defining the micro-firm

There are multiple definitions of the micro-firm, based on size and turnover, number of employees and other characteristics, although definitions are usually based on employment (Lange et al., 2000) particularly in the European context. The European Union (EU) defines a micro-firm as one that employs less than 10 employees, a small enterprise as one that employs 10 to 49 full-time workers; while medium sized enterprises consist of between 50 and 249 full-time workers (EU, 2009).

The term micro-firm usually relates to a business that employs less than ten people (Stanworth and Gray, 1991; Storey, 1994), consistent with the definition provided by the European Union (EU, 2009) adopted by the European Commission in 2003 (EU, 2003). Relevant Irish government agencies including Fáilte Ireland, Enterprise Ireland and Fórfás uphold the EU definition in the Irish context, a stance supported by Irish academic writers including Garavan et al. (2007), Kelliher and Henderson (2006), O'Dwyer and Ryan (2000), Lawless et al. (2000), Reinl and Kelliher (2011). European academic researchers also adopt this definition (Devins et al., 2005; Philipson et al., 2004; Reijonen and Komppula, 2007). Tourism specific research concurs with this definition also (Lynch, 2000; Lynch and Morrison, 2007; Michael, 2007; Morrison and Teixeira, 2004; Vernon et al., 2003).

For the purpose of this study the author will adopt the following definition of a micro-firm, as one which employs no more than 10 full time employees (EU, 2003; EU, 2009); this definition will be used as a reference point when referring to other academic literature. Where this literature refers to 'small business' and equates to organisations with less than 10 employees, it can be assumed to relate to micro-firms despite the different label of such a business. Much of the research reviewed on micro-firms has been conducted within a small and medium sized (SME) enterprise context. Studies that include micro-businesses but fail to draw separate conclusion for this cohort, reflect a perspective that what works for the larger firm can also work for the small-firm, a view rejected by the small-firm research community (for example, Gibb, 1983; Hill, 2004; Mercadez et al., 2006; Ruiz- Stewart and Beaver, 2004; Taylor et al., 2004; Welsh and

White, 1981). Those studies that provide findings specific to micro-firms also adopt the above definition of a micro-business.

2.3   The micro-firm: an Irish context

Central Statistics Office (CSO) data from 2005 reflect the dominance of the micro-firm sector revealing that 216,000 micro-businesses are operating in Ireland accounting for the vast majority (92.7 percent) of all Irish businesses. This percentage is comparable to the European micro-enterprise rate. Despite the acknowledgment that these firms are critical to Ireland's economic future, recent data reveals that although Ireland is an entrepreneurial nation (Global Entrepreneurship Monitor [GEM] Report, 2008); business failure in Irish entrepreneurial firms is more common in comparison to that of the EU25 countries (EU, 2009). This statistic confirms that the vast majority of micro-firms are not growth focused (as acknowledged by: Lawless et al., 2000 and O'Dwyer and Ryan, 2000) and the sustainability of many of these firms in the longer term is questionable. A strong small business sector is very important for the economic performance of a country (Devins et al., 2005; GEM report, 2008; Matlay, 1999) and that importance is amplified in the economic uncertainty that has prevailed in Ireland since 2006.

2.4 Micro-firm strategic success and growth

High failure rates and modest growth characteristics typify most micro-firms (Devins et al., 2005; Roper, 1999) this is also true in the Irish context (GEM report, 2009). Forty percent of small-firms cease to trade within the first three years (Smallbone, 1990; Storey and Johnson, 1987) and eighty percent fail (Storey and Cressy, 1996) in the longer term. Research from Ganguly (1985) in the eighties demonstrated that the smallest of businesses were failing at a rate that was six times higher than their larger counterparts. Other research indicates that there is little distinction between businesses that fail and those that are just surviving (Smallbone, 1990). In 2001, a Fitzpatrick Associates study (2001) revealed that Irish small business failure rates ranged between 33 percent and 41 percent after five years trading. InterTrade Ireland's[2] latest business monitor which surveys 1,000 companies across Ireland on a quarterly basis, reveals that the economic downturn has hit small business hardest and report that nearly half (forty eight percent) of micro-businesses reported that they are winding up, contracting or simply trying to survive. This compares to just 14 percent of firms with over 50 employees who indicated the same trends. Recent indications from the County Enterprise Boards (CEBs)[3] business and banking confidence survey, revealed that twenty five percent of respondents indicated that their business was at risk at closing compared to twenty eight and a half percent in the same survey taken the previous year, suggesting either a resilience in the CEB client businesses or that a number of businesses have already ceased trading.

It has been noted in the literature that many micro-firms do not seek to grow their business (Chell and Baines, 2000). Indeed, the majority of Irish micro-firms have been found to operate in the traditional rather than growth focused milieu (Lawless et al.,

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[2] A business development body promoting North-South trade by building business capability and competitiveness.

[3] 35 CEBs were established in Ireland in 1993 to provide support for micro businesses at local level.

2000; O'Dwyer and Ryan, 2000). This is especially true in the tourism sector where a range of lifestyle factors influence motivation for business ownership and development (Ateljevic and Doorne, 2004; Getz and Carlsen, 2005; Morrison et al., 2008; Reijonen and Komppula, 2007; Thomas and Thomas, 2006; Thomas et al., 2011), these issues will be discussed in more detail in chapter five (p. 90).

The absence of growth in the micro-firm context has been attributed to resource constraints (Chaston et al., 1999b). Resource poverty is a key feature of the micro-business. This offers partial explanation for the reported shortage of managerial capability in micro-firms that has been identified as an inhibitor to growth (O'Dwyer and Ryan, 2000; Report of the Expert Group on Future Skills Needs, 2006). Managerial competence is particularly important in established businesses to enable owner/managers to deal with external shocks (Fáilte Ireland Product Development Strategy, 2007; Storey, 1994) and the potential to develop these capabilities through participation in learning communities will be explored in greater detail in chapter five (p.90).

2.4.1   Micro-firm learning and development support

Previously micro-firm owner/managers have perceived training and development offerings as lacking relevance to their learning and business development requirements. While the shift in public policy and subsequent business development provision since the 1980s is evident, calls are ongoing for further improvement in small business policy and support (Fitzpatrick Associates Economic Consultants, 2003; The Report of the Small Business Forum, 2006). A number of European initiatives (European SME week, 2009) and national support offerings (via Fáilte Ireland; Enterprise Ireland; LEADER groups, Enterprise Boards and other educational institutions) reflect this change. Learning and development support in the FLN context is considered next.

Previous studies have highlighted the importance of developmental education in the small business setting (Baum, 1989; Lean, 1998), acknowledging the necessity for such offerings to have practical applicability (Garavan et al., 2004; Morrison et al., 2010; Schaper et al., 2005) to be of value to the owner/manager. Previously, academic-led learning and development programmes were perceived as, '*isolated centres of elite knowledge creation*', a perception that requires revision (Taylor et al., 2004: 233) in light of many successful contemporary approaches to training, development and learning networks (Halme, 2001; Florén and Tell, 2004; Morrison et al., 2004; Kelliher et al., 2009).

The last decade in particular has witnessed the growth of networks as a form of learning and business development support and the benefits of membership are well reported. International studies acknowledge the value of network-centred learning in the micro-firm environment (Devins et al., 2005; Down, 1999; Gibb, 1997; Hannon et al., 2000; Taylor and Thorpe, 2004) and learning supports that improve managerial competence can improve the survival rate of these small businesses (The Report of The Expert Group on Future Skills Needs, 2006; O'Dwyer and Ryan, 2000). However, as the learning needs of this diverse cohort (micro-firms) are highly differentiated (Dutta and Evrard, 1999; Mainemelis et al., 2002), providing support is challenging.

From a tourism perspective, Fáilte Ireland, the Irish tourism development agency, recognised that small tourism businesses can struggle to provide an environment where sustained and developmental learning takes place. Resource constraints and a suspicion of formal academic training (a view supported by: Hannon et al., 2000; Morrison and Teixeira, 2004; Smallbone, 1990) compound this problem. Cognisant of these issues, Fáilte Ireland collaborated with Waterford Institute of Technology in 2006 and established a FLN programme (the Tourism Learning Network initiative). The FLN provided tourism-related businesses with a substantial business development programme, and clustered tourism micro-firm owner/managers in the hopes of future cooperative activity and collaborative learning (see appendix A: for a detailed description of the Fáilte Ireland TLN programme). Relevant tourism sector influences

on learning will be discussed in greater detail in chapter five (p. 90). The internal and external features of the micro-firm are considered next.

2.4.2   Internal characteristics of the micro-firm

Internal characteristics that influence learning in the micro-firm include the micro-firm's structure, management, business strategy, culture and finally the central role that the owner/manager assumes in the business.

2.4.2.1 The organisational structure of the micro-firm

The dual role of ownership and management is typical in the micro-firm setting, creating a one-person centred organisational structure (Dutta and Evrard, 1999; Palvia et al., 1994; Simpson, 2001) which is flat or horizontal (Morrison and Teixeira, 2004), with centralised authority, minimal internal management levels and a wide span of control (Cole, 1996). This structure presents opportunities for greater flexibility and rapid adaption to change (Aragon-Sanchez and Sanches-Marn, 2005). This type of structure also facilitates the swift application (and resultant business benefit) of applied learning and development in the business (Van der Wiele and Brown, 1998; Reinl and Kelliher, 2009).

The smaller the firm, the more power resides at the centre. There is a resultant pressure on the owner-manager to be an expert in all fields of management. Typically the sole decision maker within the firm (Lean, 1998; Reijonen and Komppula, 2007) the micro-firm owner/manager relies on intuition to guide decisions and tends to be less dependent on formal decision models (Rice and Hamilton, 1979). Requirements for formal management development and HRD systems are negated in this environment and the micro-firm owner-manager's pivotal role in the organisation can impede their development and business aspirations (Garavan et al., 2004; O'Dwyer and Ryan, 2000).

2.4.2.1.1 <u>Micro-firm management</u>

Responsibility for a wide array of tasks is part of the daily job description of the micro-firm owner/manager. As such, their management skills frequently develop by trial and error (Schaper et al., 2005) as they experience managing their business day-to-day. From Storey and Cressy's (1996) perspective, business ownership can be viewed as a 'learning experiment' that can potentially act as a buffer against business failure. This view is endorsed by micro-firm owner/managers themselves, who perceive their business skills as paramount to the growth and survival of their businesses (Lean, 1998). Ateljevic's (2009) research reveals a tendency on the part of tourism owner/managers to overvalue local knowledge while overlooking other important market trends. The value of the owner/managers past experience and management skill is evident throughout the literature but successfully leveraging that experience and management is dependent on numerous factors that will be discussed in greater detail in chapter three (learning and the learning process: p. 37).

The informal management style and paternalistic management/employee relationship that typifies micro-firms (Matlay, 1999) equates to a less functional structure (Hannon et al., 2000) as owner/managers and their employees have to be multi-skilled (Lange et al., 2000) to fulfil numerous roles in the organisation. Some argue that this informality supports a faster decision-making process (Devins et al., 2005) and provides for greater flexibility. Similarly, the lack of management layers has also been found to promote cross learning (Van der Wiele and Brown, 1998) in this environment.

From the discussion above, it is fair to say that the management competencies can be developed and the micro-firm's structure can be enhanced, to support a learning culture within the firm. Ultimately, the objective is to build capabilities that assist micro-firm survival and development (Kelliher and Reinl, 2009). Success also relies on individual attributes and capabilities that can impact (positively or negatively) learning and business development in this setting.

2.4.2.1.2 <u>Strategy formulation</u>

From a strategic perspective, micro enterprises tend to be more conservative than larger firms and are likely to change incrementally (Storey and Cressy, 1996) hence formal strategic planning is not common in small firms (Garavan et al., 2007; Hall, 1995; Reijonen and Komppula, 2007), a distinct disadvantage from Lyles et al.'s (1993) perspective. Weick (1979) suggests that micro-firm managers are selective when it comes to perceiving their operating environment in its totality, arguing that this approach determines their response to strategy. Research highlighting the need to develop greater strategic awareness amongst small-firm owner/managers (Gibb and Scott, 2001) acknowledges the complexity that lies in achieving this, as the owner/manager has difficulty in separating strategic planning from day-to-day problem solving (Garavan et al., 2004; Schaper et al., 2005).

The view that micro-business owners do not plan may be a misnomer as there may still be clear mental frameworks of future plans regardless of whether they are formally written down (Garavan et al., 2004; Kuratko et al., 1999; McCarthy and Leavy, 2000; Wyer, 1997). Gibb and Scott (2001) argue that this informal approach may not be a reflection of the capability of the business, to the contrary the developmental process can be very dynamic and is characterised by the owner/manager's preference for learning by doing.

As micro-firm competitive advantage is often built on localised and tacit knowledge and a quick response to market signals (Wickham, 2001), an intuitive strategic approach is understandable in this milieu (Kelliher and Reinl, 2009). The flexibility and close proximity of micro-firm stakeholders is a distinct advantage in the informal strategic planning process.

2.4.2.1.3   <u>Micro-firm culture</u>

Culture can be defined as a collection of values and norms that are shared by people and groups within an organisation. Values encapsulate beliefs, ideas and behaviours and from these values norms develop that shape the way members of an organisation behave (Hill and Jones, 1998). The micro-firm culture is reflected in the motivations, values, attitudes and abilities of the owner-manager (Greenbank, 2000) and it has often been described as an extension of the owner's personality (due to their central role in the business and its development). It can be assumed that the owner/manager will shape the learning culture in such settings, fostering or dissuading learning depending on his/her attitude to learning and development.

Extreme resource poverty in this business environment (Devins et al., 2005) results in little opportunity for developmental learning and reflection, hence learning priorities gravitate towards short-term issues faced by the business (Schaper et al., 2005). This reactive fire-fighting approach though understandable, may foster a learning culture that is not open to development (Devins et al., 2005).

The micro-firm's culture lends itself to informal narrative modes of communication which have been found to be inherently collaborative (Matlay, 1999) suggesting the potential for leveraging learning competencies and social capital through learning community participation within and beyond the boundaries of the micro-firm.

2.4.2.1.4   <u>Role and influence of the micro-firm owner/manager on learning</u>

Many have argued that key to small-firm success is the competencies, skills and knowledge that their managers possess (Down, 1999; Greenbank, 2000; Fáilte Ireland Tourism Product Development Strategy, 2007; Kelliher and Henderson, 2006; Leana and Van Buren, 1999; O'Dwyer and Ryan, 2000). Managerial capital is a critical resource in the micro-firm (McCartan-Quinn and Carson, 2003), wherein managers provide skills and knowledge acquired through education and experience to the

business. This managerial learning competence can potentially drive motivation, effective communication and cultivate a learning dynamic that can result in the ability of the organisation to rapidly adapt to its environment (Kelliher and Reinl, 2009). In cases where managerial competencies are weak and ineffective short-termism prevails, leaving little room for learning transfer and development. The HRD orientation in the micro-firm is discussed next.

2.4.2.1.5   Human Resource Development (HRD) orientation

The facilitation of learning is at the core of all Human Resource Development (HRD) efforts (Desimone et al., 2001). HRD also incorporates training and development among other functions however in the small-firm context it is likely that it will solely consist of a training and development function (Sambrook, 2004). As short-term issues take priority over long-term learning goals in the micro-firm, training and development suffers (Hill, 2004). Research confirms that HRD as it is traditionally conceived of, is non-recognisable in micro-firms (Garavan et al., 2004; Hill, 2004). Typically micro-firm HRD is unplanned, accompanied by informal training, and led by a non-HRD expert. As such, informed and effective decisions in relation to training and development cannot be made and potential learning opportunities are restricted (Baum, 1999; Sadler-Smith and Lean, 2004; Sambrook, 2004).

It is no surprise that training and development positively correlate to firm size (Garavan et al., 2004), with larger firms demonstrating a stronger emphasis on the design and implementation of HRD throughout the organisation (Baum, 1999). In the micro-firm resource constraints contribute to a lack of training, planning, budget and expertise. In response to these learning barriers, a number of subsidised learning and development supports have been available to the smaller business community however the opportunity costs associated with participation in these programmes can be restrictive.

Research suggests that the role of learning broker (see glossary) will become increasingly important in HRD research in the small and micro-firm context (Iles and Yolles, 2004). Rigg and Trehan (2004) explain that learning cannot be thought of as occurring in an isolated context (e.g. the organisation). To the contrary, learning reaches across the boundaries of the organisation or network, transforming the role of the learner into that of a HRD practitioner or learning broker (Wenger, 1998). Key characteristics associated with this broker role feature regularly throughout the literature on learning communities (Holden et al., 2006; Iles and Yolles, 2004) and despite the different labels assigned to the broker role, their common objective is to stimulate learning in the small/micro business setting. Features of this role are discussed in greater detail in section 4.1.1.1 (p. 68).

Many suggest that a different understanding of the established concept of HRD is required for the micro-business environment (Garavan et al., 2004; Hill, 2004; Sadler-Smith and Lean, 2004). Hill (2004) advocates a definition that reflects the individualistic nature of the micro-firm where the job itself becomes the facilitator and the focus of learning. This is precisely why the author chooses to position the concept of HRD rather than try to define it, stating that it is '*an indefinable processor of naturally occurring organisational learning and development processes'* (Hill, 2004: 23). This definition reflects an organisational emphasis that is problematic when applied to learning communities that are devoid of an organisational structure. Much of the literature on the concept of 'HRD as learning' fails to provide an explanation of the learning process (as previously critiqued by Rigg and Trehan, 2004). It is reasonable to assume that a different understanding of HRD is required for a learning community setting. Further discussion of the HRD concept will be postponed until chapter four (p. 63).

It is useful at this point to tabulate the owner/manager's influence on learning given the central role they assume in the business (table 2.1).

Table 2.1: Micro-firm owner/manager influence on learning

Owner/manager attribute	Strength/Effective	Weakness/ Ineffective	Influence on learning
Strong willed	Drive & motivation	Less absorptive capacity	Learning & improving
Intuitive	Tacit knowledge, responsive	Ideas are not tested; strong reliance on learning through experience	Idea & opportunity generation
Reflective capability	Organisational learning	Non-learning transfer	Development of human resources (HRD)
Informal planner	Adaptive Dynamic development process characterised through learning by doing	Lack of strategic objectives & understanding of value of human resources as a means of achieving competitive advantage	Identification of short & longer term learning needs
HRD orientation	Naturally occurring learning & development driven through business development tasks	Informal reactive learning	Learning broker role

Adapted from Kelliher and Reinl, 2009

The tabulation above takes cognisance of the micro-firm's internal structure, management, business strategy, culture and HRD orientation (discussed above) and the resultant impact of these on learning in this setting. Micro-firm resource constraints are considered next.

2.4.3 Resource constraints in the micro-firm environment

Resource poverty (see glossary) describes a significant feature of the micro-firm and it fundamentally impacts attitudes to training and development. It has also proven to be an important influencer upon the operation, development and growth (Perren, 1999) of the business. Taking a resource based perspective, the firm is perceived as a sum of tangible

and intangible resources that are leveraged to create organisational capabilities (Almor and Hashai, 2004; Aragon-Sanchez and Sanchez-Marin, 2005) by nurturing the core competencies of the business (Prahalad and Hamel, 1990). To compete and develop in the business environment the micro-firm requires resources (Duhan et al., 2001). Almor and Hashai (2004) contend that while the strongest resources/capabilities can be a source of competitive advantage which require nurturing, weaker resources/capabilities can have the effect of neutralising any advantage created. Hill and Jones (1998) contend that a business may not require resources to establish a distinctive competency once it has capabilities that the competitor does not possess. As capabilities are made up of intangible resources (Barney et al., 2001) such as learning competence, learning and management development are crucial for the success of the micro-business. Inefficient management practice has been identified as a major contributor to resource poverty (Morrison and Teixeira, 2004) and further inhibits the micro-firm's ability to engage with the learning process (Kelliher and Henderson, 2006). This can lead to a self-perpetuating cycle, where limited access to learning opportunities can lead to meagre development in the business and even business failure (Comhar Briefing Paper, 2006) unless the owner/manager can engage with the learning process.

2.4.3.1 Time constraints

Time restrictions in the micro-firm prohibit training, development and learning (Lange et al., 2000; Storey and Cressy, 1996). Any time spent away from the business causes a major upheaval due to the central role that the owner/manager adopts in the business. As a result, long-term training and development suffer (Schaper et al., 2005). In the absence of any real opportunity to step back and take a long-term view of the business the micro-firm manager misses out on an integral part of the learning process (Sullivan, 2000), the ability to develop reflexive capabilities (Cunliffe, 2004). This places the micro-firm owner/manager at a distinct disadvantage in terms of learning, as reflective observation is a critical aspect of the learning process. The importance of reflection in the learning process has been well established (Gibb, 1983; Kolb, 1976 and 1984). Bypassing the analytical process, the perceived learning needs of the micro-firm owner/manager may not match their actual learning needs (Gibb, 1983). As noted by Freel (1999) and Vernon et al. (2003), the opportunity costs (including time and

finances) associated with participating in training and development have influenced the design and delivery of many contemporary learning and development offerings and have resulted in more flexible approaches to learning in recognition of this learning barrier.

2.4.3.2 Financial constraints

Micro-firms have very limited scope to obtain capital from financial institutions (Gibb, 1983; Mazars Report, 2010). Considered to be higher risk, they are charged a risk premium by lending institutions (Storey and Cressy, 1996). Research in an Irish context (Report of the Small Business Forum, 2006) concurs that small businesses find obtaining financial assistance for both start-up and growth purposes problematic. This financial problem was exacerbated in the economic downturn from 2006 on and the resultant credit crisis in the business environment. The European Commission adopted a new directive based on the Small Business Act (2008), aimed at improving the cash flow of European businesses (Small Business Europe, 2009). Around this time, small business stakeholders (ISME[4], 2009; Small Firms Association, 2009) complained that Irish lending institutions were 'closed for business' prompting the Irish government to commission an independent business lending review.

Financial restrictions result in an inability on the part of the small-firm owner/manager to pay for services required by the business (Welsh and White, 1981). Lack of finance determines the degree of management development and training in the business (Schaper et al., 2005; Thomas and Gray, 1999) as costs prohibit involvement. Where training does occur it is viewed in terms of cost not investment (SME Management

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[4] ISME is the independent organisation for the Irish small & medium business sector, with in excess of 8,500 members. ISME offers a comprehensive range of advisory services and publication, independent lobbying and representation, cost saving schemes, training and development programmes, and regional networking events designed to enhance the day-to-day running of members' businesses.

Development Report, 2005), the owner/manager favours investments that yield short-term results and justify expenditure (Storey and Cressy, 1996). Poor financial flexibility also results in little investment in human capital, particularly that of a specialist nature (Baum, 1999; Schaper et al., 2005), this human resource constraint will be discussed next.

2.4.3.3 Human resource constraints

Human resources are a vital asset to a business and a fundamental component of its competitiveness (Storey and Sisson, 1993). Unfortunately the micro-firm is characterised by a limited internal pool of human resources (Devins et al., 2005; Welsh and White, 1981), thereby restricting potential competitiveness and increasing their risk of failure (Storey and Cressy, 1996). The primary human resource in the micro-firm is in most cases the owner/manager.

Limited human resources equate to limited absorptive capacity (see glossary) in the firm (De Faoite et al., 2003) as the ability to assimilate information is restricted (Rosenfeld, 1992, as cited in Fuellhart and Glasmeier, 2003). Learning is required to maintain the absorptive capacity of the business. In the tourism context, a shortage of managerial capability (outside that provided by the owner/manager) means that there is often no one else to run the business in the event that the owner/manager is off-site (Morrison and Teixeira, 2004). This inability to function with one member down constrains learning capacity in the micro-firm (Lange et al., 2000).

Lack of managerial resources also influence attitudes towards enterprise development in the tourism context (Baum, 1999; Morrison and Teixeira, 2004). Low entry barriers equate to small percentages of formally educated managers (Hannon et al., 2000; Morrison and Teixeira, 2004; Smallbone, 1990). As a result, there tends to be a formal knowledge constraint within such businesses. Lacking the expertise to identify training/learning needs or the behavioural changes associated with meeting those learning needs (Garavan et al., 2004; Gibb, 1983), learning tends to be a by-product of a business process rather than a process in itself (Devins et al., 2005).

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Throughout the literature many researchers have bemoaned the lack of attention given to the management and development of human resources in the small business context (Baum, 1999; Beaver and Hutchings, 2004; Sadler-Smith and Lean, 2004; Matlay, 2000), despite the potential contribution that HRD can offer in a small business learning context. The restrictions that resource poverty imposes on micro-firm learning are evident from the discussion above. Potential solutions to these challenges often lie outside the boundaries of the micro-firm. External influences on learning are discussed next.

2.5   External influences on micro-firm learning

Research suggests that micro-firms have framed relations with the external environment (Dutta and Evrard, 1999). Relentless change in the international business environment is also reflected in the tourism sector (Morrison and Teixeira, 2004) and the intensification of competition is evident through ever-increasing; government regulations, employment law, tax and interest rate adjustments (Welsh and White, 1981; Report of the Small Business Forum, 2006). A number of tourism specific studies, reveal that the regulatory burden is a major challenge for smaller tourism businesses (Pratten and Lovatt, 2005; Vernon et al., 2003). These regulations have a disproportionate effect on micro-firms and can act as a disincentive to growth leaving little scope for financial investment in training (SME Development in Ireland, 2005). Limited competitive influence (Simpson, 2001; Storey and Cressy, 1996) and specifically the inability of the micro-firm to leverage competitive advantage, results in a weak market position, this is also the case in tourism firms (Morrison and Teixeira, 2004). Therefore external shocks can have a serious impact and can even threaten their existence (Welsh and White, 1981; Storey and Cressy, 1996).

Government policy influences the micro-firm's ability to compete in the marketplace. Public policy has been found to have a negative effect on micro-firms (Cook and Barry, 1995; Kuratko et al., 1999; Thomas and Thomas, 2006) as these firms have been found

to lack influence at government level. Negative policies include price, cost inequities, legislative compliance, regulatory liberalisation, competition restriction, paperwork burden, managerial restriction and mental burden (Bannock and Peacock, 1990; Kuratko et al., 1999).

The literature demonstrates that micro-firms feel substantial pressure from rapid changes in their environment including customer demands, product life cycle and government regulation and legislation (Alstrup, 2000). In order to survive, an organisation's rate of learning must be faster than the rate of change in their environment (Barney et al., 2001; Hamel and Prahalad, 1994).

The internal and external influences on micro-firm learning are tabulated next in Table 2.2. Following this tabulation a conceptual model of the micro-firm learning environment is presented.

Table 2.2: Key micro-firm learning themes

Criteria	Aspect	Influence on learning
Internal micro-firm environment		
Structure	Little separation of ownership & control Limited pool of human resources	Knowledge & learning constraints
Strategy	Informal, incremental process Short-termism	Based on intuitive learning, learning by doing Ideas not tested Informal (unspoken) strategy, tacit knowledge
Owner/manager attributes & management competency	Owner/manager influence Attitude Established management practice developed from experience	Value own business experience (& others) Need to see value of training/ learning Analytical process bypassed, reluctance to change & little impetus for development
Decision making	Personal business objectives Crisis management	Shaped by previous informal information Short-term training/ learning gains are valued
HRD orientation	Learning & development process constrained by lack of resources & knowledge Facilitation	Job is the facilitator of naturally occurring learning Learning is a by-product of a business process
External micro-firm environment		
Diseconomies of scale	Weak market position	Short-termism Inability to leverage competitive advantage
Regulatory burden	Rely on advice of friends Levels of awareness & participation are low	Informal information gathering Quality of information used for decision making is questionable

The key themes that impact learning in the micro-firm (outlined above in Table 2.2) are incorporated into the following conceptualisation of the micro-firm learning environment (Figure 2.1).

Figure 2.1: A conceptualisation of the micro-firm learning environment

External impulses
Rapid change & intensified competition

THE MICRO-FIRM

Learning capacity

Rate of change is faster than the rate of learning

Forced reactive learning environment

The job facilitates naturally occurring learning

Internal constraints

Constrained resources
Managerial competence & effectiveness
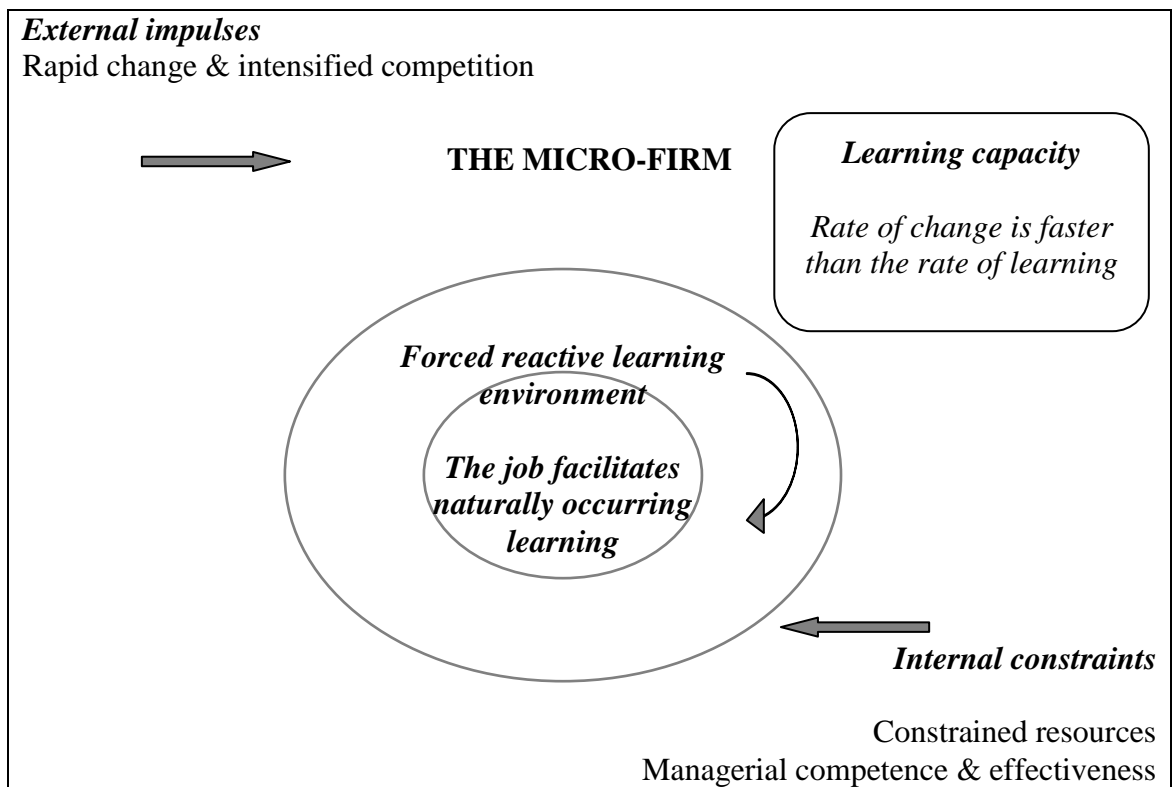
From the previous discussion and resultant conceptualisation of the micro-firm learning environment, it is clear that while a significant pool of knowledge and learning capacity may be present in the micro-firm, external impulses are sometimes required to trigger internal development (Lundberg and Tell, 1998) and stimulate learning. External impulses brought about by industry standards, regulation, or dominant customer and supplier demands may challenge the organisation's learning environment, at least in the short term. Potentially, these learning challenges can be incorporated into the management structure and strategy of the micro-firm. Where the owner/manager has the capability to deal with these learning challenges effectively, external impulses can potentially result in the emergence of a more competitive micro-business in the longer-term.

2.6   Conclusion

The literature reviewed in this chapter revealed a number of elements and relationships and internal and external aspects of the micro business environment that influence learning. These themes have been catalogued in table 2.2 and demonstrate that the micro-firm is indeed a unique learning entity wherein underlying external and internal micro-firm features may curtail optimum learning. Specifically, the organisation's minute size, paternalistic management style, intrinsic flexibility and informal culture should all contribute to a positive learning environment, at least in theory. However the centrality of the owner/manager, a well reported lack of resources and external regulatory and competitive pressures, may produce a forced learning environment and create competitive constrictions.

Ultimately, pursuit of sustained and developmental learning is challenging in this setting. As such, the conceptualisation of the micro-firm learning environment presented in Figure 2.1 provides a departing conceptual framework where the elements and relationships that influence micro-firm learning can be explored further. The conceptualisation illustrates that internal and external influences produce a forced and reactive learning dynamic in the micro-firm. This learning dynamic has the potential to result in the emergence of a more competitive micro-business in the longer-term.

The next chapter considers learning and the learning process in the context of this working framework drawing from social learning theory and in particular the communities of practice perspective (Lave and Wenger, 1991; Wenger, 1998).

Chapter Three

Learning and the learning process

3.0 Introduction

As the overall aim of this research study is to: *explore the elements and relationships that influence individual learning in an Evolving Learning Community (ELC), after facilitated learning supports reach a conclusion,* this chapter begins by providing an outline of various learning perspectives before clarifying the learning orientations and assumptions of the researcher (section 3.1, p.38).

The importance of the social context through which learning occurs, has been highlighted throughout the literature on learning. As social learning theory and in particular the community of practice (CoP) perspective (Lave and Wenger, 1991; Wenger, 1998) forms the theoretical base for this research study, it is discussed in detail in this chapter. The CoP perspective has achieved prominence in the literature on knowledge and learning in organisational and educational contexts but less attention has been given to this perspective in the network and learning network literature. This is also the case for literature set in the tourism domain, despite its relevance in this context (Shaw and Williams, 2009). The merits and shortcomings of this perspective, as they relate to micro-firm learning communities, are also considered and outlined.

3.1   Learning

The researcher's orientation to learning influences the theoretical base adopted for this study. Learning theories and perspectives broadly fit within the categories outlined below in Table 3.1.

Table 3.1: Orientations to learning

Aspect	Behaviourist	Cognitivist	Humanist	Social & situational
View of the learning process	Change in behaviour	Internal mental process (including insight, information processing, memory, perception)	A personal act to fulfil potential	Interaction in social contexts
Locus of learning	Stimuli in external environment	Internal cognitive structuring	Affective & cognitive needs	The relationship between people, practice & the environment
Impact on individual learning	Behavioural changes Competency & skill development	Cognitive development Learning how to learn	Self-directed learning	Social participation Movement from the periphery to the centre of practice
Learning theorists	Kolb ← → Bandura ← - - - - → Beach	Kolb		Lave & Wenger Bandura

Adapted from: Smith, 1999

It is important to note that subtle overlaps exist between these learning orientations, for example, Kolb's (1984) cognitivist theory of experiential learning is often considered to be behaviourist in its orientation. Similarly, it has been suggested that Bandura (1977) bridges the gap between behaviourist and social learning perspectives (Smith, 1999). The behaviourist and social learning perspectives are considered now.

From a behaviourist perspective, Beach (1980) defines learning as a human process that embraces skills and knowledge and learning is only achieved when it results in a change of behaviour or intention to change behaviour. According to Kolb (1984), true learning takes place when values and norms become modified through a cycle of concrete experience, reflective observation, abstract conceptualisation and active experimentation, referred to as the learning process. Kolb's (1976) theory of learning has been criticised for failing to take account of the impact and value of social learning relationships. Given the learning community emphasis of this study it is not considered to be an appropriate theoretical base.

Lave and Wenger (1991) suggest that Kolb's (1984) theory typifies most theories of learning. The authors argue that cognitive perspectives of learning fail to appreciate the learning context and as such, they call for a shift in emphasis from individual cognitive learning processes to the learner as a participant within social practice. It is important to note that this emphasis maintains: '*a very explicit focus on the person, but as a person in the world, as a member of a socio-cultural community*' (Lave and Wenger, 1991: 52). Considering this research explores learning in an Evolving Learning Community (ELC), the learning orientation considered most appropriate is the social learning perspective. As such, Lave and Wenger's (1991) learning perspective forms the basis for the subsequent review of learning literature.

Encapsulating the view that learning is something more than individual learning by doing (experiential learning); Lave and Wenger's (1991) social learning perspective places individual learning within social relationships, emphasising that individuals learn through participation in a CoP. This social orientation to learning represents epistemic assumptions about the way individuals learn (Table 3.1, p. 38). Before moving on to discuss individual learning in more detail, the learning orientation of the researcher is acknowledged.

3.1.1 Learning orientation of the researcher

Crossan et al. (1995) report that learning studies tend to differentiate on three key dimensions: unit of analysis, learning emphasis, and the relationship between learning and performance. The author's stance on these dimensions, as applied in this research study, is:

- The unit of analysis in this research study is the individual. A rich body of research on learning in the micro-firm and network domain has been drawn from in this study. This body of research frequently emphasises different units of analysis (for example the individual, collective, organisation and network). These studies are considered with regard to their potential to contribute to understanding individual learning within those groups, organisations and networks.

- The primary orientation of the researcher is the social orientation. As such, Lave and Wenger's (1991) CoP perspective forms the theoretical base for this research.

- The relationship between learning and performance is a complex one. From a social learning perspective the emphasis of learning measurement shifts from performance related criteria to learner development within a social learning setting (this development will be discussed in greater detail later in the thesis).

Having outlined the orientation and assumptions of the researcher, individual learning is discussed next.

3.1.2   Individual learning-related attributes

While this research draws from the social learning perspective it recognises that learning is influenced by a range of individual attributes and traits. These include autonomy, responsibility, motivation, and the learning preference of the micro-firm owner/manager.

3.1.2.1 Autonomy and self-direction

In the past, many training and development provisions offered to the micro-business community failed to meet the learning requirements of this cohort. Contemporary practice-based approaches to learning and management development (that encourage self-directed learning) have been more successful (Halme, 2001; Haugen Gausdal, 2008; Florén and Tell, 2004; Foley et al., 2009; Morrison et al., 2004; Kelliher and Reinl, 2009).

Autonomy is an important pre-requisite for self-directed learning (see glossary). Foley et al. (2007) suggest that learner ownership requires greater learner involvement at each stage of the learning process to ensure that deeper levels of learning are achieved. The 'anchor' (see glossary) of learning is also identified as an important stage of learning ownership, but it requires a level of skill on the part of the owner/manager (as acknowledged by Wing Yan Man, 2007 and Wyer et al., 2000).

3.1.2.2 Responsibility for learning

Responsibility is also a feature of effective learning (Chaston et al., 1999). Where learners' view themselves as receivers of learning/training, responsibility for learning tends not to develop after training (Jõgi and Karu, 2004). Previous authors have pointed out that this is not necessarily innate as it may be fostered through prescriptive training provisions (Candy, 1987; Sadler-Smith et al., 2000) that encourage 'learned helplessness' (see glossary). It follows that the goal of the management educator or

'learning broker' is to facilitate learner development by providing applicable knowledge and expertise, engaging the learner in practice and encouraging the learner to negotiate meaning in pursuit of autonomy.

3.1.2.3 Motivation for learning

Motivation is an essential pre-condition for effective learning (Gunnigle et al., 2002; Sadler-Smith et al., 2000) and is dependent on perceptions of benefit (Sadler-Smith et al., 2000). Micro-firm owner/managers will often seek new information when a problem arises that requires immediate resolution, demonstrating a preference for learning that is immediately applicable. Patton et al. (2000) suggest that where learning/training is undertaken for more strategic motivations, it may be more likely that it will result in deeper levels of learning.

In the tourism context, lifestyle maintenance is often the owner/manager's primary motivation for running a small business (Ateljevic, 2009; Getz and Carlsen, 2005; Lynch, 2000; Morrison and Teixeira, 2004; Thomas and Thomas, 2006). The aspirations of these owner/managers have obvious consequences for learning and management development and as a result levels of commitment and strategic focus will vary (Morrison, 1996). Down (1999) points out that learning in the small-firm context need not be growth-focused, as all managers require a level of managerial competence to maintain their business, regardless of their growth aspirations and learning motivation. Garavan and Ó'Cinnéde (1994) suggest there are few careers that require such a range of functional knowledge and skill as that of the small business owner/manager. It is clear from the discussion above, that learning is fundamental for micro-firm survival and development, regardless of the entrepreneurs' motivation to own a business. The learning preference of the micro-firm owner/manager is considered next.

3.1.2.4 The learning preference of the micro-firm owner/manager

Learning preference is defined as an individual's disposition towards a particular mode of learning (Sadler-Smith et al., 2000). It is extensively reported that adults have a preference for activity-based learning and this is also the case in the small/micro business environment (Choueke and Armstrong, 1998; Lawless et al., 2000; Sullivan, 2000). The learning styles of these managers are characterised by strong active experimentation skills but tend to be weak on reflective observation skills. Notably, Laurillard (1979) and Reynolds (1997) both argue that focusing on individual learning styles leaves little room for the learning context to be considered. The social perspective of learning pays little attention to learning styles; rather it suggests that learning occurs in context, as members engage in practice. Depth of learning is considered next.

3.1.3   Depth of learning

The CoP perspective does not categorise learning into levels of understanding and conceptualisations as the behaviourist approach does. According to Lave and Wenger (1991) learning occurs as the result of social interaction in practice and development is recognisable as individuals move from peripheral participation to full participation within the learning community. This development entails a depth of involvement in the practice and learning of the community. As levels of participation and engagement vary in a CoP, so too will the learner's identity.

Argyris (1977) contends that learning occurs on at least three different levels, these are single loop, double loop and triple loop learning. The first two levels of learning are relevant to this research. Single loop learning can be described as the most basic form of learning encompassing the identification of a problem followed by corrective action taken to resolve the problem on the part of the learner. According to Argyris and Schön (1996) at this level, the primary concern is the achievement of goals and objectives, while performance specified by the existing values and norms remain unchanged. This level of learning also equates to Marton and Saljo's (1976) 'surface learning', and in the

context of social learning, it represents experience and action without reflection and therefore, it cannot be considered learning.

In contrast to single loop learning, where values and norms become modified, double loop learning exists. By challenging the nature of the problem and redefining it, changes occur in basic assumptions and core values. Therefore, in trying to distinguish between occurrences of single or double loop learning it is important to note where inquiry goes, and not just where it begins. Double loop learning in the micro-firm context is a difficult attainment, as the existing norms of the owner/manager may be tacit (Kelliher, 2006). As such, norms may remain unidentified and unarticulated. The next section considers the social learning process in greater detail.

3.2 The social learning process

Prior to discussing the features of social learning in the context of this research a brief history of the CoP concept is provided. Key differences between CoPs, FLNs and ELCs are also outlined.

3.2.1 Communities of Practice: A brief history

Since it was conceived over twenty years ago, the notion of learning as a process of participation in a CoP has gained significant ground in organisational and educational practice. The CoP perspective offered a critique of a cognitive approach that dominated the learning literature at the time (Contu and Wilmott, 2003; Wenger 1998). The CoP concept is hardly visible in the network literature and this is particularly the case in the literature on learning networks (Haugen-Gausdal, 2008; Juriado and Gustafsson, 2007; Kelliher and Reinl, 2011). In the main, the research that exists emphasises networks situated in large organisational settings, with the exception of Kelliher and Reinl (2011).

Brown and Duguid's (1991) seminal work on networks of practice focused on workplace learning. It demonstrated the applicability and value of the CoP perspective to organisational networks. Much of the research that followed Brown and Duguid's work can be categorised into two main camps; the first focused on informal CoPs within organisations and the second took a knowledge management view, focusing on the business value dimensions of CoPs (a comprehensive review of this work is detailed in Murillo, 2011). As networks of practice are characterised by weak links, wherein members '*may never know, know of, or come across one another*' (Brown and Duguid, 2001: 205) it's applicability in relation to this study is limited.

The Community of Practice (CoP) learning perspective emerged from Lave and Wenger's (1991) seminal work. They viewed learning as a process of joining in the

practices of a community, initially working at the periphery of practice and gradually progressing to 'legitimate peripheral participation' alongside 'old masters', eventually developing the status and identity of a full member. In their ethnographic study, Lave and Wenger (1991) observed a number of different apprenticeships (including those of mid-wives, tailors, quartermasters, meat cutters and non-drinking alcoholics in Alcoholics Anonymous) and concluded that learning lies in the relationships between people and the conditions that bring those people together (Smith, 1999). These communities were in the main autonomous, as noted by Murillo (2011).

The CoP concept was further developed in Wenger's later work (1998). It has had considerable attention in the organisational domain (Brown and Duguid, 1991; Wenger 1998) where learning occurs as people work together. Although there is confusion in the literature about CoPs and other social learning structures (Murillo, 2011) some researchers have attempted to distinguish between social forms of learning - a notable example is Brown and Duguid's (1991) work on networks of practice. Members of networks of practice work in the same or similar practice but do not necessarily work together.

3.2.2   Learning in communities of practice

A CoP is defined by a shared interest that implies membership is intertwined with commitment and:

> *'Over time, this collective learning results in practices that reflect both the pursuit of our enterprises and the attendant social relations. These practices are thus the property of a kind of community created over time by the sustained pursuit of a shared enterprise. It makes sense, therefore to call these kinds of communities, communities of practice',* (Wenger, 1998: 45).

According to Wenger (1998), the CoP concept is neither narrowly nor broadly defined and as such it requires further exploration in the context of this research. There are a number of indicators that typify the formation of a CoP (Table 3.2).

Table 3.2: Indicators of community of practice formation

Indicators of CoP formation	Indicators that a community is not a CoP
Sustained mutual relationships & shared engagement	Less intense interaction & less accountability to a joint enterprise
Mutually defined identities & an awareness of the knowledge, role and contribution of others	
Ability to assess the appropriateness of actions & products	
Rapid information flow & the absence of introductory preambles	
Fast problem identification & discussion	
A shared discourse reflecting a common perspective on the world	Little local production of negotiable resources
Shared stories, jargon, knowing laughter & shortcuts to communication	

Source: Wenger, 1998

These indicators range along a continuum and learning communities need not display all of the indicators outlined above however the less that they do, the more likely it is that the learning community is not a CoP.

CoPs are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact (Wenger, 2006). Members have an identity defined by a shared interest, this is the catalyst for their engagement and interaction and as they build relationships over time they learn from each other (Wenger, 2006). From the CoP perspective, learning is inherently collaborative. Although collaborative learning refers to learning in a set (Revans, 1982) the focus is nonetheless on individuals within that set, encompassing the notion of learner interdependency. The underlying assumption is that learning exists at an individual level, in this case – the owner/manager.

The shared pursuit of an activity/knowledge encompasses an '*evolving and continuously renewed set of relations*' that are incumbent in the learning process (Lave and Wenger, 1991: 50). Placing the emphasis of learning on practice, it follows that the learner must engage in and contribute to that practice (Wenger, 1998). Through *participation* in *practice*, the individual develops an *identity* (Wenger, 1998). These core concepts of participation, practice and identity are so intertwined in the social learning process that it is difficult to take account of one concept without explaining or making reference to the others. Nonetheless, these concepts are discussed in the ensuing sub-sections.

3.2.3   Practice

Brown and Duguid (2001: 203) describe practice in a network context as '*undertaking or engaging fully in a task, job or profession*,' this description reflects the larger organisational focus that dominates the literature on learning communities (see for example: Beeby and Booth, 2000; Bessant et al., 2003; Chaston and Mangles, 2000; Halme, 2001; Hansen-Bauer and Snow, 1996; Morrison et al., 2004; Tell, 2000). Wenger (1998: 47) acknowledges that practice is social, involving what an individual '*does and also the historical and social culture that gives meaning to what they do*'. From the CoP perspective there are three dimensions of practice: members share a concern for the pursuit of knowledge or activity of some kind (1. joint enterprise) and following that goal, they interact with one another regularly (2. mutual engagement) and practice develops over time as members of the community learn and develop a set of resources (for example tools, documents, routines, procedures, vocabulary and symbols) that embody learning and enable community members to engage effectively with each other (3. a shared repertoire). Murillo (2011) suggests that these are the three defining dimensions of Wenger's (1998) model of learning.

While members are mutually engaged in shared pursuit, each member develops an identity within the community. In a CoP setting, learning encompasses the notion of

individual and collective competence. As the emphasis of this study is the individual, collective learning is considered in terms of its influence on individual learning.

3.2.4 Participation and identity

CoP members form an identity in line with their participation in the practice of the community. Identity evolves over time as it is continuously negotiated in the community (Jørgensen and Keller, 2008; Wenger, 1998). From the outset newcomers join CoPs, gaining access to 'arenas of mature practice'. Initially, they learn at the border of the community (Lave and Wenger, 1991). At this stage, the learner's status within the community is termed legitimate peripheral participation (LPP) because they are beginning their journey towards the centre of practice. The inexperience of the newcomer is viewed as an asset to be exploited by established members, as it provides an opportunity to reflect on the activity and practice of the community. As the newcomer becomes more involved in the CoP, and more competent at carrying out their role, they gain legitimacy within the community and their identity develops to that of 'full participant'. It can be inferred from the above, that learning development from a community of practice perspective, is discernible through the learners' increasing involvement in practice and their increasing identity as a master practitioner. However, Jørgensen and Keller (2008: 535) critique Wenger's (1998) overly simplistic notion of learner identity, arguing that it overlooks unique learner qualities such as the ability to be reflexive as '*a means of intelligent participation*', qualities that are important from a learning development perspective. As community members decide what competence is (Wenger, 1998), this has implications for the types of identity that are legitimised within the community (Murillo, 2011).

Lave and Wenger (1991) emphasise that learning to perform new tasks and master new understandings are merely a partial representation of learning as LPP. These tasks and understandings are part of systems of relations that the individual (learner) both defines and is defined by, an important feature of learning identity emphasised in the quote below:

> *'...the concept of legitimate peripheral participation obtains its meaning, not in the concise definition of its boundaries, but in its multiple, theoretically generative interconnections with persons, activities, knowing and the world'* (Lave and Wenger, 1991: 121).

A range of internal and external pressures inhibit the ability of individuals to participate in practice. Jørgensen and Keller (2008) suggest that socialisation, identity formation, and learning are historically situated and contextually dependent (Lave and Wenger, 1991; Wenger, 1998). In an independent learning community setting (such as the ELC), participation and identity are influenced by a variety of internal pressures (including but not limited to: unequal relations of power, trust and histories of learning) that shape the individual's identity.

Handley et al.'s (2006) attempt to identify conceptual issues in relation to the CoP learning perspective led them to assert that the dynamic between levels of participation and the development of identity are critical aspects of the individual learner's influence on the practice of a community. A pre-requisite to learning development (the move to full participation) from the CoP perspective, is that the learner is fully involved in activities and efforts that facilitate such competence. Roberts (2006) suggests the power structures that feature in organisations may be reflected in CoPs, an issue that may influence participation (Handley et al., 2006). Marshall and Rollins (2004) noted the influence of power and politics on the process of the negotiation of meaning. As such, individuals may not have access to develop beyond the peripheral stages of ELC involvement. As a result, meaning is constructed by members that are more dominant in the ELC. The negotiation of meaning is considered next.

3.2.4.1 The negotiation of meaning

Participation and reification refer to a fundamental duality in the negotiation of meaning (Wenger, 1998). Examples of reification include procedures or templates for carrying out a task, a company logo, or a mission statement for a group or enterprise. In this sense these are '…*not simply concrete, material objects'* but reflections of practice and tokens of human meaning (Wenger, 1998: 61). It is important to note the interplay and differences between these concepts (see Table 3.3 below).

Table 3.3: CoP membership influence: The interplay of reification and participation

Participation	Reification
Experience & membership transform & inform each other	Products of reification are reflections on practice
The pursuit of joint enterprise spurs action	• They permit the co-ordination of practice
Negotiated practice influences the way that knowledge is interpreted	• They shape perceptions • They shape & are shaped through identity & practice
Identity & practice develop over time	

Source: Wenger, 1998

In a CoP setting, meaning is negotiated among members in a process of negotiation and action. CoP members create objects that encompass and give form to their experience and understanding as learners (Wenger, 1998). Over time, the community develops a shared repertoire of resources (stories, rules, routines and ways of doing things) that embody the shared learning and knowledge of ELC members. This shared repertoire does not represent a set of beliefs that are harmoniously held and shared. To the contrary, differences in interpretation occur and are viewed as opportunities for negotiation that permit the learning community to continuously produce new meanings. These differences in interpretation are essential to learning and can only be considered problematic when they disrupt mutual engagement.

A learning curriculum develops through mutual engagement as opportunities to learn arise within the community and at the boundaries of the community. Lave is careful to draw a distinction between a <u>learning curriculum</u> (a field of resources in everyday practice viewed from the perspective of learners) that is characteristic of a CoP and, a <u>teaching curriculum</u> (constructed for the instruction of newcomers) where the meaning of what is learned is provided and limited through the instructors' perception of what knowing is about (Lave, 1989, cited in Lave and Wenger, 1991: 97).

In Wenger's 1998 study, he illustrates that 'claims processors' (CoP members) are mutually engaged in the joint enterprise of claims processing but acknowledges that the CoP they belong to does not operate in isolation; rather it exists within a broader industrial system wherein the members have limited power and influence. The broader external operating environment maintains and exercises a level of control over the CoP. The external operating environment is, broadly speaking, outside the remit of this research study and as such it will only be considered where issues arise that require exploration in the context of the overall aim of the research. Having discussed the social learning process and outlined the core processes and elements of a CoP, limitations of this perspective in relation to this study are outlined next.

3.2.5   Limitations of the CoP learning perspective

While the CoP perspective is considered the most appropriate theoretical base in the context of this research study, it is important to take cognisance of some of the criticisms that have been levelled at this perspective:

- There is considerable variation throughout the literature as to how CoPs are characterised (Benders and van Veen, 2001; Cox, 2005; Handley et al, 2006) as they tend to be depicted as heterogeneous across a number of dimensions including geographical spread, lifecycle and evolution;
- The 'CoP' concept is ambiguous, and is still evolving (Handley et al, 2006; Murillo, 2011). It is contested and problematic in some contexts (Garavan et al., 2007) and as such the different aims and features of different communities require exploration (Bogenreider and Nooteboom, 2004);

- CoP theory only addresses certain topics involving quite specific types of communities and networks (Duguid, 2005);

- CoP theory contributes little to the knowledge and understanding of evolving practice within communities (Fox, 2000);

- Further research is required to identify forms of participation other than those outlined by Wenger (1998), that reflect the individual learner's participation within and beyond communities of practice (Campbell et al., 2009; Handley et al., 2006; Jørgensen and Keller, 2008; Murillo, 2011);

- Handley et al. (2006) question the relevance of the CoP perspective of learning in a small firm context, arguing that smaller firms lack the resources to fully exploit the learning benefits of community participation. It must be noted that this criticism relates to the CoP perspective and its relevance within a small firm context and not in a collective ELC environment, wherein owner/managers can potentially leverage the collective resources of the community. The value of applying the same principles to large and small communities has also been questioned by Roberts (2006);

- Smith (2003; 2009) remarked that, in the past, Lave and Wenger's (1991) perspective has led to an under-appreciation of the uses of more formal structures and institutions for learning. In a FLN, learner autonomy and competence development serve as a catalyst for ELC formation and success, therefore adequate attention must be given to developing these competencies in a facilitated setting;

- Recent research suggests the need to manage organisational CoPs (Garavan et al., 2007) and Wenger himself acknowledges the managerial paradox inherent within CoPs (Wenger and Snyder, 2000). The rationale for ELC establishment and engagement and the structure of the ELC differs considerably from that of an organisation, these issues coupled with a multiplicity of motivations and varying degrees of interest pose a considerable management challenge;

- There is confusion in the literature between CoPs and other social structures concerned with learning and knowledge (Murillo, 2011). Some researchers have attempted to limit the scope of CoP analysis and have sought to highlight the differences between CoP and other forms of social analysis (Duguid, 2005: Haugen-Gausdal, 2008);

- Lave and Wenger's work does not pay sufficient attention to the influence of power in CoPs (Contu and Wilmott, 2003; Marshall and Rollins, 2004; Thompson, 2005).

3.3 Learning within and beyond micro-firm boundaries

Within the literature, concepts such as organisational learning, inter-organisational learning and network learning often represent divergent units of analysis. As such, these concepts are open to misrepresentation and confusion as to their comparative relevance and value in terms of extending the knowledge base on learning.

3.3.1 Organisational learning

In the learning literature, the term organisational learning (OL) is used to describe a process of learning that occurs within an organisation (encompassing individual and group learning) or to describe learning by an organisation (organisational learning). OL provides the means to harness all forms of learning within the organisation, it primarily equates to owner/manager learning in the micro-firm setting due to the central role they assume in the business. As a concept OL incorporates more that the learning of an individual, encompassing the notion that individual learning is extended to other members within the organisation (Beeby and Booth, 2000; Chaston et al., 2001; Halme, 2001). As OL encompasses more than individual learning, it is outside the remit of this research. While the body of literature on OL has been drawn from in the context of this research, it has been used where it relates to individual learning within an organisational context.

3.3.2 Inter-organisational learning

The term inter-organisational learning (IOL) is used to describe; learning by individuals, groups, organisations and networks (Halme, 2001; Larsson et al., 1998). While there is common agreement about the context where IOL occurs, the learning entity differs (Knight and Pye, 2004). As such, the unit of analysis requires consideration (Nohria and Eccles, 1992). When the term IOL is used in this study it refers to learning by individuals (owner/managers) across different organisations (for example between micro-firms). The relevance of IOL research in the context of this

study lies in its reference to owner/managers (individuals) of different businesses learning in a collective setting.

3.3.3   The distinction between learning in a network and network learning

A body of recent learning network literature focuses on learning within networks (Halme, 2001; Florén and Tell, 2004; Kelliher et al., 2009; Reinl, 2008) as opposed to learning by networks. There are important differences between the two concepts reflected in distinct units of analysis (Knight and Pye, 2004). Learning in a network refers to individual learning within a network setting (for example a FLN). In contrast to this, learning at network level (network learning) is identifiable through changes to network practices and structures. These changes in network systems (Knight, 2002) are essentially network learning outcomes. This form of learning is only relevant in the context of its influence on individual learning in ELCs. Although the focus of this research remains the individual, '*in order to truly understand the impact of self-direction ... it is crucial to recognize the social milieu in which such activity transpires*' (Brockett and Hiemstra, 1991: 32). In pursuit of the aim of this research individual learning at various levels in the network; peer to peer, sub-group and community level are explored.

3.4   External opportunities to enhance micro-firm learning

As discussed previously the external environment can challenge and stimulate micro-business owner/manager learning. Learning opportunities arise in a variety of formal and informal learning contexts. This study will limit the exploration of learning opportunities to the FLN and ELC settings in accordance with the overall aim of this research (outlined on p. 5). Prior to moving to a discussion of these settings, the competing paradigms of formal and informal learning are explored.

3.4.1   Formal and informal learning- competing paradigms

Formal and informal learning are often perceived as opposing dichotomies, although this perspective has been challenged by Billet (2001), who argues that all learning takes place within social boundaries that are formalised to a degree. In the past, formal learning was perceived to have greater 'learning value' than informal learning. This perception influenced decision makers that provided funding for further education and led to the increasing formalisation of many informal learning settings – an issue highlighted in Smith's (1999) research. In defiance of this stance, proponents of the social learning perspective suggest that learning takes place in the absence of formal provisions (Lave and Wenger, 1991), where attention focuses on the learning context rather than attempting to categorise learning as being of a formal or informal nature (Colley et al., 2002). Nonetheless Colley et al. (2002) identify key features of formal and informal learning (Table 3.4, p. 58) and contend that boundaries or relationships between formal, non-formal and informal learning can only be understood within particular contexts.

Table 3.4: Key features of formal and informal learning

Formal learning	Informal learning
Prescribed learning framework	Organic & evolving learning
Organised learning events	Learning in practice
Teacher/trainer presence	Peer learning
Assessment/Accreditation	Not usually accredited or assessed
Learning is intentional	Learning is often incidental
Individual emphasis tends to dominate	Collaborative emphasis
Status of knowledge & learning	Learner identity less visible
External specification of learning outcomes	Learning expectations tacit
Learning mediated through agents of authority	Learning is self-directed
Learning is intentional and explicit	Learning is often secondary/implicit

Adapted from: Colley et al., 2002

The danger of using formal/informal labels to describe learning contexts is to over-simplify learning. For example, facilitated learning environments such as the FLN have purpose built informal learning strategies (Kelliher and Reinl, 2011). Likewise in many informal learning contexts formal dimensions are reported (Billet, 2001). Colley et al. (2002) contend that it is the blend of formal and informal learning dimensions rather than their separation that is significant in these settings. As formal and informal dimensions are almost always present in any learning situation/context, the authors (Colley et al., 2002) suggest that it is more helpful to examine dimensions of formality/informality, thus avoiding over-simplification, an argument that is echoed in the literature on small-firm networks (see for example Gibson et al., 2005; Kelliher and Reinl, 2011). This view is also consistent with the social perspectives of learning (Brown and Duguid, 1991; Lave and Wenger, 1991).

To summarise, the opportunity for the micro-firm owner/manager to learn, lies within a variety of learning contexts that vary along dimensions of structure and formality, these are illustrated in Figure 3.1, below.

Figure 3.1: Micro-firm learning contexts
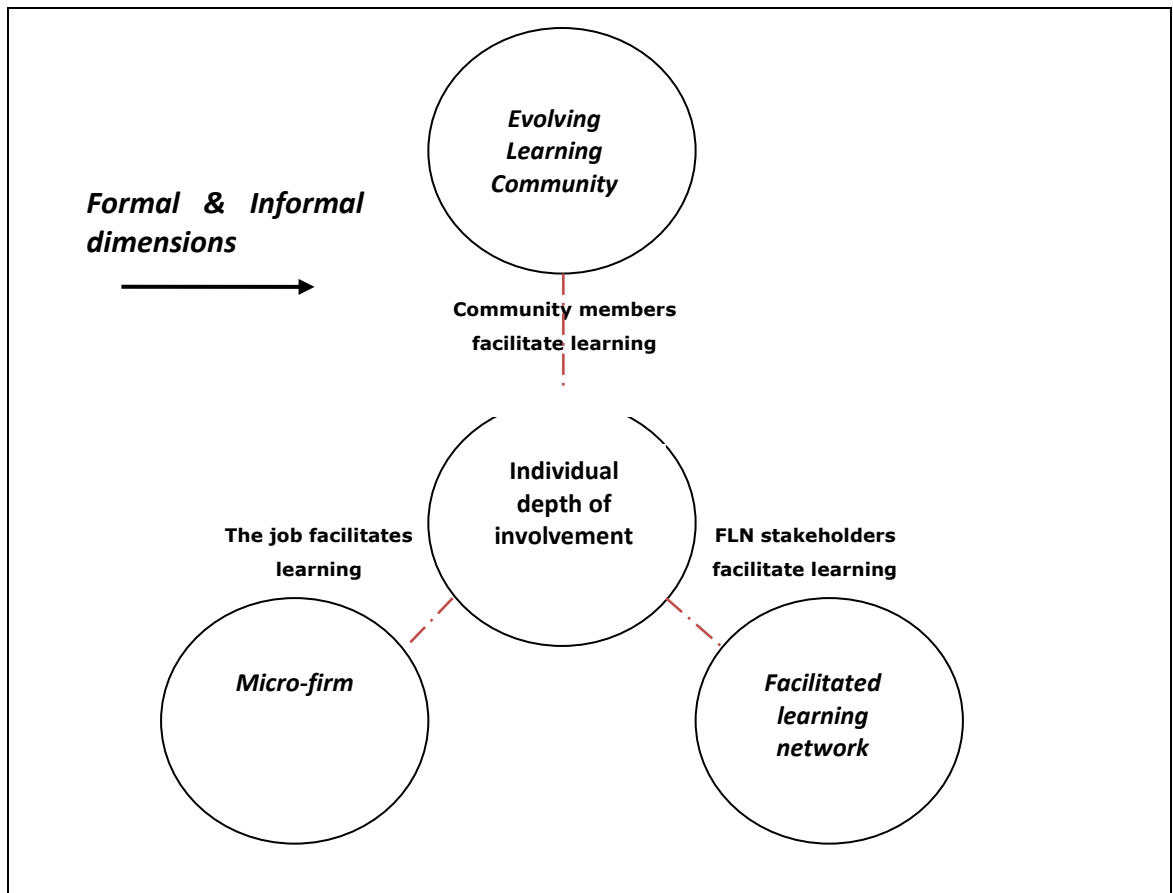
To reiterate, the learning contexts relevant to this research study are, the micro-firm learning environment (discussed in chapters two and three), the FLN and the ELC environment (to be discussed in chapter four).

3.5   Measuring learning success

As the unit of analysis for this research is the individual and the orientation to learning is the social perspective, learning success is considered in terms of the development of individual learning competence and identity within the ELC. In this context, higher level learning behaviours that are demonstrative of learner development and autonomy include the identification of opportunities to learn and reflexive capability among other learning behaviours. According to Wing Yan Man (2007) these are measurable and observable. It is not the intention of this research to measure the quality of learning but to understand the ELC learning dynamic. Pursuit of such understanding informed the research design and techniques utilised in this study.

Learning behaviours and their measurement are discussed in greater detail in the subsequent chapters.

3.6 Conclusion

The concepts of learning and the learning process have been outlined in this chapter, drawing primarily from the social learning perspective. Given their 'learning community' emphasis it is surprising that little attention has been given to the CoP perspective in the network and learning network literature. This is also the case for literature set in the tourism domain, despite its relevance in this context.

Acknowledging the researcher's own assumptions, key features of individual learning and the social leaning process have been highlighted and discussed. The literature reviewed for this chapter has revealed a number of individual traits that influence learning and depth of involvement in the practice of a learning community; these include autonomy, motivation and the learning preference of the owner/manager. Having reviewed the key dimensions of the CoP learning perspective (participation, practice and identity), it is clear that the elements and relationships that influence learning in facilitated learning networks and independent learning communities differ considerably from those of CoPs in larger organisational settings. A growing body of literature that highlighted limitations of the CoP perspective was outlined and revealed a number of elements and relationships that require consideration from an ELC perspective. These included issues of structure, power, identity and management.

Based on the CoP premise that learner development is discernable through increased depth of involvement in the community, and given the nuances of micro-firm learning environments outlined in the previous chapter (including the centrality of the owner manager, resource constraints and external pressures) the key concepts of CoP require distinct consideration from a micro-firm ELC perspective. Specifically, more formal structures of learning are overlooked in the CoP literature and given that the catalyst for ELC establishment is the facilitated learning network it is clear that the evolutionary dimensions of learning communities and individual learner development within remain elusive. As such, they are worthy of further exploration.

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The conceptual model (Figure 3.1, p. 59) that arose from this review illustrates that the phases of learning community evolution vary along dimensions of structure and formality. The learning dynamic at each phase of evolution is distinct and as such they require separate consideration from a learning perspective. The subsequent chapter expands the discussion of these features to the FLN and ELC settings.

Chapter Four

Cooperative micro-firm learning communities

4.0 Introduction

Cooperative learning networks offer the potential to counteract the resource constraints and resultant learning barriers discussed previously in chapter two (p. 13). They can assist the owner/manager to leverage resources, ultimately enhancing the owner's learning competence and business development potential (Chell and Baines, 2000; Devins et al., 2005; Hannon et al., 2000; Kelliher and Reinl, 2010; Witt, 2004). However, a successful outcome is not a given. To the contrary, success requires a level of learning competence and specific supports from others participating in the learning community.

This chapter explores the role of FLN in the development of micro-firm owner/manager learning competence. Over time, it is argued that embeddedness reduces the need for formal governance (Human and Provan, 2000; Uzzi, 1997) as trustful relationships develop (Florén and Tell, 2004), forming the basis for higher level learning behaviours (Chaston and Mangles, 2000; Reinl, 2008). As such, the learning process has emergent properties that create opportunities for deeper learning over time (Florén and Tell, 2004).

To the best of the author's knowledge, learning competence has not been explored longitudinally in terms of sustainability and evolution once facilitated learning supports end. The latter section of this chapter will explore these issues in an Evolving Learning Community (ELC) setting.

4.1 The micro-firm learning network

Drawing from an extensive body of literature on networks, learning and micro-firms, a number of micro-firm learning network features are revealed.

Throughout the literature networks are described as socially constructed sets of relationships (Brown and Duguid, 1991, Johannisson, 1995; Lave and Wenger, 1991; Taylor and Thorpe, 2004). More than a decade ago Shaw (1995) argued that if networks are socially constructed, then learning might also be socially constructed. Recent research in a network context validates this observation (Lynch and Morrison, 2007; Reinl and Kelliher, 2010) and reinforces the views of social learning theorists (Brown and Duguid, 1991, Lave and Wenger, 1991; Wenger, 1998).

Networks function for a variety of reasons including marketing, innovation and research and development however learning networks (LN) specifically seek to encourage learning development (Bottrup, 2005; Chaston and Mangles, 2000) and business development (Ahmad, 2005; Jack et al., 2004; Taylor and Thorpe, 2004). When established, a set of co-ordinated actors, whose connections are based on social exchange and collaborative relationship ties, show varying degrees of formality (Weber and Khademian, 2008). The concept of a FLN also falls within this frame, and is described as *'a network formally set up for the primary purpose of increasing knowledge'* (Bessant and Tsekouras, 2001: 88). The benefits of network participation are realised through the development of effective learning relationships (Fuller-Love and Thomas, 2004; Kelliher and Reinl, 2010; Lave and Wenger, 1991).

FLN structures, supports and strategies are designed to support learning (Bessant and Francis, 1999; Florén and Tell, 2004; Kelliher et al., 2009; McGovern, 2006; Morrison et al., 2004; Tell, 2000; Tell and Hallia, 2001) and also act to nurture effective learning

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relationships and stimulate a cooperative learning ethos and a sense of community and identity among participants.

Micro-firm learning networks play a vital role in combating resource constraints and resultant learning barriers (section 2.4.3, p. 28) by providing a means for participants to leverage information and resources that would otherwise be unavailable to them (Chell and Baines, 2000; Julien, 2007; NCOE, 2006; Witt, 2004; Wincent and Westerberg, 2006). This potentially results in improved management development and learning competence (Chaston and Mangles, 2000; Kelliher and Reinl, 2009; Wing Yan Man, 2007), a process that can be mapped on to the learning cycle (Bessant et al., 2003). This underpins an important assumption; if the collective resources possessed by businesses within a cooperative learning network are leveraged and disseminated throughout the network, they may improve individual business performance (Hannon et al., 2000; Jack et al., 2004; Schaper et al., 2005; Wing Yan Man, 2007) and network success (Witt, 2004). Drawing from the literature above, a number of key features of a micro-firm learning network are identified and tabulated overleaf in table 4.1.

Table 4.1: Micro-firm learning network criteria

Criteria	Micro-firm context	Authors
Function	Learning networks specifically seek to encourage learning enhancement & business development through processes that can be mapped onto the learning cycle, ultimately contributing to improved business performance.	Ahmad, 2005; Hannon et al., 2000; Jack et al., 2004; Schaper et al., 2005; Taylor & Thorpe, 2004; Wing Yan Man, 2007.
Social construction	The network is a socially constructed set of relationships and learning may also be socially constructed, reinforcing the views of social learning theorists.	Brown & Duguid, 1991; Johannisson, 2000; Lave & Wenger, 1991.
Collective resources	Networks provide a means for participants to leverage information & resources that would otherwise be unavailable to them.	Chell & Baines, 2000; Fuller-Love & Thomas, 2004; NCOE, 2006; Tinsley & Lynch, 2007; Witt, 2004.
Network support structures	Learning structures, supports & strategies that encourage autonomy, permit the owner/manager to leverage cooperative resources & embed learning in the micro-firm environment.	Brown & Duguid, 1991; Gregory, 1994; Kelliher et al., 2009; Tinsley & Lynch, 2007.
Participation benefits	Over time, the development of network relationships should stimulate learner autonomy & instil a sense of community among participants.	Fuller-Love & Thomas, 2004; Lave & Wenger, 1991; Morrison & Teixeira, 2004.

It is clear from this tabulation (table 4.1) that cooperative learning strategies facilitate individual learning in the FLN (Tell and Hallia, 2001; Wing Yan Man, 2007). Interacting in learning relationships can '*help foster an environment in which knowledge can be created and shared and, most importantly, used to improve effectiveness, efficiency, and innovation*' (Lesser and Everest, 2001: 46).

As noted in the introduction to this chapter, network membership does not automatically guarantee that effective learning will occur. Success is dependent on a number of influencing factors including; individual characteristics (outlined previously in chapter two, p. 25) and the firm's incumbent resource criteria (chapter two, p. 28). Learning readiness is a key factor in the success of learning networks (Reinl and Kelliher, 2010) while the quality and level of networking, facilitation, and learning support will affect the application and success of learning in this setting (Johannisson, 2000; Reinl and Kelliher, 2010, Sullivan, 2000).

The literature affords the following definition of a micro-firm learning network:

> *'a socially constructed learning environment that enhances individual learning and business development through cooperative learning strategies that facilitate learning relationship development, resource sharing and learner autonomy'.*

<div align="right">(adapted from: Reinl and Kelliher, 2010: 142).</div>

Having outlined the key components of a micro-firm learning network, their role as a catalyst for owner/manager learning is discussed next.

4.1.1   Facilitated learning networks as a catalyst for micro-firm learning

Potentially FLNs provide a dynamic, resource rich learning environment for micro-firm owner/managers, where business development can '*mirror the dynamics of learning*' (Dobbs and Hamilton, 2007: 299). The success of the FLN is dependent on its ability to embed effective learning strategies that assist community members to leverage relational capital in pursuit of learner autonomy and learning competency development. These learning relationships and strategies are discussed next.

4.1.1.1 Learning network relationships and strategies

In a FLN setting, relationships and interventions are normally managed by an academic/management support hub (Florén and Tell, 2004; Halme, 2001; Haugen Gausdal, 2008; Iles and Yolles, 2004; Kelliher et al., 2009; Morrison et al., 2004). In that support hub, key learning stakeholders (typically comprising an academic team, support team and facilitators/mentors) fulfil the role of learning broker. The learning broker ensures that a learning emphasis is maintained and that the action/reflection imbalance (previously outlined as a learning barrier in chapter two, p. 25) is addressed. The role of learning brokers is to promote learner autonomy (Cope and Watts, 2000) encourage reflection (Florén and Tell, 2004; Kolb, 1984; Sullivan, 2000; Tell and Hallia, 2001; Kelliher and Reinl, 2011) and enhance individual learning capability (Sullivan, 2000). Likewise, learning brokers guide pro-active behaviours that assist participants to identify opportunities to leverage learning (Johannisson, 2000; Morrison and Bergin-Seers, 2001). The relationship between the individual learner and the learning broker entails expectations. These expecations equate to a psychological contract of sorts. In its simplest meaning, a psychological contract refers to the time, resources and effort put in to a task and what is expected in return (Reagans and McEvily, 2003). The contract is not directly supported by formal agreements, reward or endorsement systems. It is underpinned by trust between the parties involved. It is a two way process of expectation in the facilitated learning network environment. Here, the participant expects access to a learning environment where resources can be leveraged to enhance learning and business development. Learning brokers expect that participants will engage in the social learning process and demonstrate a degree of learning and business development. Ultimately, the goal is for learners to think more strategically about their learning needs (Devins et al., 2005; Hannon et al., 2000; Morrison and Teixeira, 2004) in order to enable learner autonomy (Gregory, 1994) over time.

Learning sets contribute to learning in FLNs (Devins et al., 2005; Kelliher et al., 2009; Lynch and Morrison, 2007; Tell, 2000). They usually comprise a small number of owner/managers (six - eight) accompanied by experienced facilitators. Here, learners are encouraged to share their learning expectations, knowledge and experience with

their peers (Bessant and Francis, 1999; Florén and Tell, 2004; Morris et al., 2006), building the foundations for trustful learning relationships. In the FLN, academic and industry experts share their competence and expertise with participants. These learning brokers also recognise the learning value of the owner/manager's expertise and competence in managing a successful business.

The facilitator plays a key role in assisting the group to establish an agenda and rules in the early stages of network relationship development, thereby instilling a sense of membership and identity among network members (Morris et al., 2006; Tell and Hallia, 2001). Previous studies have shown that the facilitator is also instumental in developing self-efficacy[5] among participants. Learning brokers often provide a valuable 'outside in' perspective (Haugen Gausdal, 2008; Morrison and Bergin Seers, 2001) in relation to business development issues that challenge learners to question prior learning strategies, encourage them to identify and leverage learning opportunities to overcome knowledge deficits and support business development (Bessant and Francis, 1999; Devins and Gold, 2004; Larsen and Lewis, 2006). Participant presentations often feature in FLNs in the form of 'learning stories' that permit individual business experiences, challenges and successes to be shared with the wider learning community. These learning supports encourage an emphasis on actionable learning outcomes that the owner/manager can apply back in the business.

Considering the FLN objective is ultimately learner autonomy, brokers need to find an optimum intervention level where the balance between learning broker reliance and autonomous learning can be maintained (Reinl and Kelliher, 2010), in order to minimise the risk of learned helplessness (see glossary) in these networks. If this occurs, the learning momentum may be lost as soon as the facilitation ends, and responsibility for this risk must be equally understood by both parties (providers and participants) so that provider-learner dependencies do not solidify. This underpins the perspective that FLNs are not an end in their own right, but rather a means through which individual and

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[5] Belief in one's own skills and abilities

collective learning competencies can be developed, with the goal of self-led/independent community evolution over time.

Learning strategies are applied in the FLN to develop learning competence and enable individuals to leverage resources from their peers in the network in pursuit of individual business development. Learning networks can assist in the development of the reflexive practitioner role, enhancing learning and learning transfer (Sullivan, 2000). This is achieved through peer reflection techniques (Down, 1999; Jõgi and Karu, 2004; Lave and Wenger, 1991; Morrison and Teixeira, 2004), the completion of individual business learning and development plans and one-to-one mentoring services (Kelliher et al., 2009; Morris et al., 2006; Sullivan, 2000).

Reflecting an awareness of owner/manager learning barriers, learning events typically take the form of residential training, with a limited number of workshops and learning set meetings. At these events training is provided on key business functions including finance and marketing. Individuals work on group business development projects that are often informed through an analysis of participant learning requirements (Bessant and Francis, 1999; Florén and Tell, 2004; Kelliher et al., 2009). These learning events have a strong social ethos where learners are encouraged to share experience. External agencies and other individuals that provide additional mentoring, learning support and knowledge transfer also contribute to learning in this setting (Halme, 2001; Kelliher et al., 2009; Morris et al., 2006).

In the FLN the individual has access to a range of learning resources including but not limited to interactive websites, newsletters, business and development plans, training resources and materials and participant presentations (Haugen-Gausdal, 2008; Kelliher et al., 2009; Tell, 2000). Learning symbols include network logos, individual development plans and network projects. These resources and symbols support learning in the network and assist with building shared meaning and a sense of community among learners (Lave and Wenger, 1991).

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Reflecting on the above discussion of FLNs, it is apparent that effective learning transpires where reflection is encouraged and where learning can be applied (in concept at least) back in the business environment. Although the FLN provides a unique learning environment where individuals can leverage learning through relationships, learning competence development is crucial for long term success. Over time, learners begin to think more strategically about their learning needs (as anticipated by: Devins et al., 2005; Hannon et al., 2000; Morrison and Teixeira, 2004). The value of peer learning in the FLN is proven. Here, learning resources are leveraged through discourse and exchange with other micro-firms that have different knowledge contexts and resources (Tell, 2000; Kelliher and Reinl, 2010). Success depends on the quality and appropriateness of this experience and the owner/manager's willingness to reflect upon and analyse the information being absorbed (Greenbank, 2000). This pre-requisite for success, coupled with the micro-firm owner/manager's preference for action over reflection make it likely that different forms and levels of support would be required once the FLN reaches a conclusion (Kelliher and Reinl, 2011).

4.1.2 Measuring learning success

From a network theory perspective, strategic advantage leveraged through network learning offers participants the opportunity to add value to their respective goods and services (Chaston and Mangles, 2000) through cost reduction and improved marketing processes. Other research has called for a shift away from objective financial measures of learning network success; advocating a focus on social measures including, opportunities to learn (Denicolai et al., 2010), the analysis of learning needs, increased knowledge sharing/transfer and improvement in practice (Morris et al., 2006). Ultimately the objective of facilitated learning networks is learner autonomy and development. Higher level learning behaviours such as these are measurable and observable (Wing Yan Man, 2007).

4.1.3 Summary of key literature themes

Having discussed individual learning in the micro-firm (chapter two and three) and then learning in the FLN environment, the following key learning themes are tabulated below (Table 4.2).

Table 4.2: Micro-firm owner/manager learning

Key themes	Micro-firm	Learning network
Learning membership & identity	Little sense of learning identity	Enhanced sense of community disseminated through the ethos & structures of the network Learning identity develops over time
Learning broker	The job is the facilitator of naturally occurring learning	Learning emphasis is maintained with a focus on action based competency development
Learning support	External supports are available through training & development initiatives	Learning structures provide support Learning emphasis maintained Learning is accredited
Learning strategies	Immediately applicable learning is valued & there is little support for formal HRD & low identification or analysis of learning needs	Learning strategies support the learning process at key stages Address reflective balance through facilitated peer-led interaction
Learning relationships	Predominantly informal weak tie relationships Unreliable knowledge base Psychological contract where perception exists that the owner/manager is the only one that can make business decisions	Individual learning is enhanced through collective interaction Relational capital is leveraged Psychological contract entails expectations between the individual learner & key learning stakeholders
Learning development	Resource limitations equate to limited investment in learning & training; overriding need to see immediate value added	Increased ownership of the learning process; reflection & the anchor of learning in the business are encouraged

Key themes (contd.)	Micro-firm	Learning network
Learning resources	Resource constraints equate to little investment in training & development	Learning resources are leveraged through the network & key learning stakeholders
Learning symbols	Learning is an unconscious process & there are few learning symbols	Learning symbols emerge: network logo, website, learning development plans, rules & learning agendas

In summary, the first section of this chapter considered the role of FLNs in the development of micro-firm owner/manager learning competence. The discussion demonstrated that individual learning is enhanced through the social learning process in the FLN (Lesser and Everest, 2001; Wing Yan Man, 2007) ultimately resulting in improved learning and business development. Over time, it is argued that embeddedness reduces the need for formal governance (Human and Provan, 2000; Uzzi, 1997) as trustful relationships develop (Florén and Tell, 2004), forming the basis for higher level learning behaviours (Chaston and Mangles, 2000; Kelliher and Reinl, 2011).

The learning process has emergent properties creating opportunities for deeper learning over time (Florén and Tell, 2004). It takes time for learning competencies to develop (Wing Yan Man, 2007; Kelliher and Reinl, 2010). Despite this, learning competencies have not been explored longitudinally in terms of sustainability and evolution once facilitated learning supports end. This is the purpose of this research study.

The next section of this chapter will explore these issues in an Evolving Learning Community (ELC) setting.

4.2 Evolving learning communities

An awareness of the potential of collaborative learning represents the learner's development after FLN support reaches a conclusion. This awareness functions as a catalyst for former FLN members to commit to a learning relationship in an independent context. This action represents an intentional autonomy in the group's development.

From the CoP perspective it is recognised that as learning evolves, the structure and practice of the community transforms (Wenger, 1998). In the ELC, the prior confines and supports of the FLN (wherein learning brokers assist with the maintenance and management of learning structures, guide pro-active behaviour and assist participants to identify opportunities to leverage learning (Morrison and Bergin-Seers, 2001; Sullivan, 2000, Wing Yan Man, 2007)) no longer exist. The ELC, like any learning community requires a learning structure in order to function at a competent level (Gibb, 1997; Johannisson, 2000). In the absence of facilitated learning support, ELC members must design and manage their own learning infrastructure and learners must adapt to changes in their new learning environment (as supported by: Iles and Yolles, 2004).

Key features of social learning (practice, participation and identity construction) discussed previously in section 3.2 (p. 45) require further consideration now from an ELC perspective.

4.2.1 ELC practice

From a CoP perspective, members learn through their interaction as they participate in the practice of the community. In an ELC setting, practice is determined by the learning and business development goals set out by its members. Inevitably, the practice of the ELC will encompass a multiplicity of motivations and expectations, this is particularly the case in the tourism domain where a range of lifestyle motivations (as outlined by: Ateljevic and Doorne, 2000; Getz and Carlsen, 2005; Marchant and Mottiar, 2011; Morrison and Teixeira, 2004; Thomas, 2007) influence learning and business development. The practice of the ELC evolves over time as members negotiate meaning. In an ideal scenario, members would be fully engaged in the community's endeavours and meaning would be negotiated and understood by all. However, the influence of power on this process has been highlighted previously (section 3.2.4, p. 49) and in the absence of guiding structures, issues of power are likely to influence learning in this setting (Handley et al., 2006; Marshall and Rollins, 2004).

Being owner/managers of their own businesses, each ELC member will have individual experience, skills and expertise to bring to the learning community. Some members will have shared histories of learning (Wenger, 1998) and will have established learning relationships (Florén and Tell, 2004; Kelliher and Reinl, 2011) from prior formal or informal engagement.

The introduction of newcomers to the community represents a new chapter in practice, (Wenger, 1998) where different perspectives and experiences can potentially enrich the learning process. However, ELC members must recognise the value of that experience in order to leverage it as a learning resource. For newcomers, relationships and competences will take time to develop (Halme, 2001; Kelliher and Reinl, 2011; Wing Yan Man, 2007) and as such newcomers require greater support.

Over time, members develop a repertoire of shared resources that embody and contain the shared learning and knowledge of the community members (Lave and Wenger, 1991; Wenger, 1998). Leveraged, these resources can result in individual and collective business development ventures that in essence represent learning outcomes. Wing Yan Man (2007) makes an important distinction between how learning related characteristics (learning competencies) are enhanced and how other competencies (for example marketing skills gained through group marketing experience or training) are generated through learning. This has implications for the way that learning is measured. Thus, from an evolved learning community perspective, the ELC's performance or impact is a consequence of the community's resources and learning competence (Reinl and Kelliher, 2010; Teece et al., 1997). In this regard, it is important to note that the CoP perspective does not view all that is done as learning, but it offers little guidance as to what constitutes non-learning (Handley et al., 2006).

4.2.2 Participation

Learning in practice (situated learning) occurs through a continuous process of negotiating meaning, thereby transforming practice even in situations where learning is not specified as a goal or set out as criteria for membership of the learning community. Just as the day to day tasks of the micro-firm owner/manager facilitate learning in the micro-firm setting, the practice of the ELC facilitates learning for its members. It follows that those who influence ELC practice influence ELC learning and vice versa.

It would appear that ELC success is dependent upon a democratic structure that permits individuals to participate in a process of negotiation and reflection with their peers. As previously outlined, the negotiation of meaning lies in the interplay between participation and reification. Wenger (1998) asserts that participation and reification (see section 3.2 p. 45) are dual sources of power that provide members with the opportunity to exercise influence on the development of the community's practice (as previously illustrated in table 3.2). As previously indicated, power and politics influence involvement in the ELC and in this context those in a dominant position will influence learning. Weber and Khademian (2008) explain that ideally, in the absence of a formal

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hierarchy (such as that found in an organisation), leadership is organic, informal and awarded by other stakeholders to individuals with the capability to leverage resources for the benefit of the network. An awareness of the influence that politics and power have on participation is a necessary pre-requisite for effective learning in this setting.

4.2.2.1 The negotiation of meaning

Negotiation permits ELC members to produce new meanings through a process that allows for the examination of differences in interpretation. From a CoP perspective, this process is essential to learning and can only be considered problematic when it disrupts mutual engagement (Wenger, 1998). The negotiation of meaning entails both interpretation and action that permit the co-ordination of practice. At the initial phase of ELC establishment, members design their own rules, forms, etc., bringing with them histories of learning and practice from the FLN setting. As time passes, competing viewpoints in relation to practice and its future development require negotiation (Human and Provan, 2000; Lave and Wenger, 1991). The practice of the ELC should incorporate and reflect the collective viewpoints (shared meaning) of its members. However in the ELC, involvement in this process may be problematic for a number of reasons, including but not limited to, differing levels of motivation and engagement, power dynamics and political engagement.

The literature contributes to the view that a learning broker (one with visible learning competencies) or brokers could assist with the development and management of the ELC (Halme, 2001; Kelliher and Reinl, 2011; Wing Yan Man, 2007). Notably, it is likely that this role will be vacant at the initial stages of ELC formation (Wenger, 1998) as these individuals may have to gain legitimacy over time (Lave and Wenger, 1991). Brokers are only one of the important roles in an ELC. Various learning identities and roles are discussed next.

4.2.3   Learning identity

Each ELC member has an identity and role within the community that brings with it a necessary depth of involvement. Depth of involvement will frame identity and vice versa (Handley et al., 2006; Wenger, 1998). The learner identities described by Wenger (1998) have been outlined in chapter three (3.2.4, p. 49), these include the newcomer, the master/expert and the broker. As noted previously, the CoP perspective has been criticised for failing to consider alternative forms of identity and participation (Campbell et al., 2009; Handley et al., 2006; Jørgensen and Keller, 2008; Murillo, 2011).

It has already been established that the learner's identity correlates to their involvement in practice, and is reflected in their development (Wenger, 1998). According to Wenger (2006) a strong identity involves deep connections with others. Wenger (1998) also describes how newcomers instigate reflection on practice within the community. Here, the competence of experts is shared with newcomers permitting them to become more involved in practice over time. Successful learning outcomes in this context are only achievable based on a number of assumptions; first is the assumption that newcomers are granted access to the learning community, secondly that they will have a desire to contribute to the practice of the ELC (Murillo, 2011) and thirdly, that full members (masters) have the capacity to understand the limitations of the newcomer's contribution (Jørgensen and Keller, 2008) and the value of the newcomer's role in shaping the future practice of the community (Halme, 2001). As already outlined, this requires a level of competence that takes time to develop (Halme, 2001; Wing Yan Man, 2007).

Wenger (1998; 2006) contends that certain individuals display a preference to adopt the role of broker, describing the broker's preference to remain at the borders of the community rather than moving to the centre of practice. In his later work Wenger (2000) extends the broker concept, outlining a variety of forms that this role can take. He describes, 'boundary spanners' that take care of one specific boundary, 'roamers' that move knowledge from place to place, creating connections, and finally, 'outposts' that explore new territories and bring back information from the forefront.

Those with a greater level of learning competence can assist the wider community in achieving a greater depth of learning, once they have an awareness of what that role entails, the motivation and/or willingness to take on such a role and the support of other members to do so. The learning network literature, suggests that this role should be supportive rather than dominant, to ensure autonomy in conjunction with access to external stakeholder and expert guidance as required. In theory, the learning broker enables guidance without a devaluation of autonomy within the learning community (Kelliher and Reinl, 2011).

The literature suggests that monitoring and evaluating learning goals (tasks undertaken by the learning broker in the FLN setting) are essential requisites for effective learning. Similarly, reviewing goals and readjusting future learning requirements are also important factors in the effectiveness and sustainability of learning networks (Bessant and Tsekouras, 2001; Kekale and Vitalia, 2003). Notably, Noel and Latham (2006) suggest that goals commonly set in business planning may not be as effective as setting learning goals; this is potentially problematic in the micro-firm business environment where action bias equates to limited buy-in for reflection and consideration of longer-term learning goals. This may also be the case in the ELC considering the predominant involvement of micro-firm owner/managers in these communities.

It follows, that the learning broker has much to offer in this context, however a difficulty highlighted with this role is that the rest of the community may not recognise or value such a contribution (Wenger, 2006). Brokers must introduce external elements that facilitate learning in the ELC (Wenger, 1998), or provide focused expertise. Wenger (1998) suggests that mistrust may ensue in the wider community due to the peripheral nature of the broker's participation as they straddle the CoP boundary in pursuit of potential learning opportunities. The broker identity that Wenger (1998; 2006) describes, plays a peripheral role in the learning community, despite evidence in the literature that this role is of central value in relation to maintaining an action/reflection balance (Halme, 2001; Jørgensen and Keller, 2008; Kelliher and Reinl,

2011; Wing Yan Man, 2007). This is particularly important from a micro-firm learning perspective (as discussed previously in chapter two, p. 13).

Handley et al. (2006) suggest that participation can be voluntarily marginal. This observation calls into question the learning value that the CoP perspective places on those that contribute to practice on a less frequent basis than some of their peers. From a learning perspective, this suggests that depth of involvement is not the same as frequency of involvement.

Those that establish the learning community (former FLN members) are in essence 'old experts' that bring with them 'histories of learning' and 'histories of practice'. Highlighting structural parameters that are relevant in this context, Thompson (2005) distinguishes between seeding structures that act to nurture collaborative activity and controlling structures that attempt to control that activity. Finally, histories of learning (for example FLN membership) can potentially hold a group '*hostage to its history and achievements*' (Wenger et al., 2002: 141), and may not be challenged if all central roles are maintained by prior FLN members. From the above it is clear that a range of identities contribute in different ways to practice and learning. From a learning community support perspective, a delicate balance is required between learner interdependence and autonomy.

4.2.3.1 Autonomy and interdependence

The degree of learner autonomy (the ability to take charge of one's own learning) in the ELC is dependent on the level of learning competence. Wing Yan Man (2007) contends that learning competence is measurable and observable through learning skills, attributes and behaviours that demonstrate effectiveness in the learning role. As the learner acts on experience accumulated in prior learning situations (for example learning competency development from TLN participation) and turns it into a desirable outcome (for example the formation and maintenance of an ELC), the learner creates

the context that provides an opportunity to develop or make use of those learning competencies. At times, community members will demonstrate different levels of learning through the extent of reflection, with informal discussions over coffee breaks often providing the opportunity for reflection and the analysis of learning needs (Orr, 1990; Wenger, 1998). At other times, newcomers instigate reflection on practice within the community. Other higher level learning behaviours include the identification of learning opportunities and mapping of skills and expertise.

The resource-based view (RBV) also acknowledges the role of competence in leveraging resources for success (Down, 1999; Greenbank, 2000; Hannon et al., 2000; Kelliher and Reinl, 2009; O'Dwyer and Ryan, 2000) but highlights a number of resource issues that may influence learning in this regard.

4.2.3.1.1 Resource exchange in the ELC

When the ELC is viewed through an RBV lens, it is conceptualised as a pool of resources embedded in the social fabric of the community. Through engagement in the ELC, individual members can potentially leverage the knowledge, experience and resources of others. However, engagement is not always a given, and previous studies have highlighted this as a concern from a network perspective (Tell, 2000). The maintenance and sustainability of structures that support community wide resource sharing (predominantly skills and knowledge) is a challenge in an independent learning community context, particularly one comprising micro-firm owner/managers. Where internal resource gaps are identified, there is a need for members to reach outside the boundaries of the community to providers of specialist knowledge. Ultimately, the value of ELC resources (both internal and external) lies in the way that the creators of those resources interrelate. Inevitably, success relies on the capability of community members to leverage ELC resources in pursuit of individual business, learning and ultimately tourism destination development (Halme, 2001; Harrison and Hakansson, 2006).

4.2.3.1.2 <u>ELC boundaries</u>

ELCs form and maintain boundary relationships with the external environment and as such they cannot be considered in isolation. Although the external environment is, broadly speaking, outside the remit of this research, a number of issues that arise in the literature from an external context require exploration from a learning perspective. These external issues include; seeding structures that transfer from one learning community to another, learning symbols and resources that cross boundaries, interactions between ELC members and external individuals and agencies (Wenger, 1998).

The structural complexity of the learning community concept is evident in Wenger's (1998) distinction between the community's boundary and its periphery. The boundary encompasses inclusion/exclusion measures such as membership criteria. Some contend that protective modifications such as these can constrain the learning community's strength in leveraging resources (Miles and Snow, 1992). The community's periphery refers to overlaps and connections that determine levels of participation. From a CoP perspective, participation and reification create 'discontinuities of boundary', for example the inclusion and exclusion of members. They also create 'continuities of boundary' for example objects of learning can cross boundaries (Kelliher and Reinl, 2010; Wenger, 1998). It is important to reiterate that these boundary objects represent more than their form, encompassing a reified 'nexus of perspectives' (Wenger, 1998).

External agents can potentially raise the ELC's resource base and this can result in the acquisition of resources and new competencies. Members of the ELC liaise with external agents in pursuit of ELC objectives in a process of 'local manoeuvring' (Borch et al., 2008). Little is known about how these interactions influence the learning dynamic within an ELC, and less is known about how the existing resources of ELCs are best leveraged in pursuit of management competence and tourism destination development.

The resource pool and support agents will differ from one learning community to another. However, the impact of ELC endeavours will depend on the learning and management competence of the community members and their ability to leverage the available resources into capabilities for business and tourism development. Hence, it is fair to say, that despite the individuality and variance between ELCs, much can be learned from the process by which resources are orchestrated and leveraged in pursuit of ELC endeavours and ultimately competitive advantage (Figure 4.1, below).

Figure 4.1: Leveraging resources in the ELC
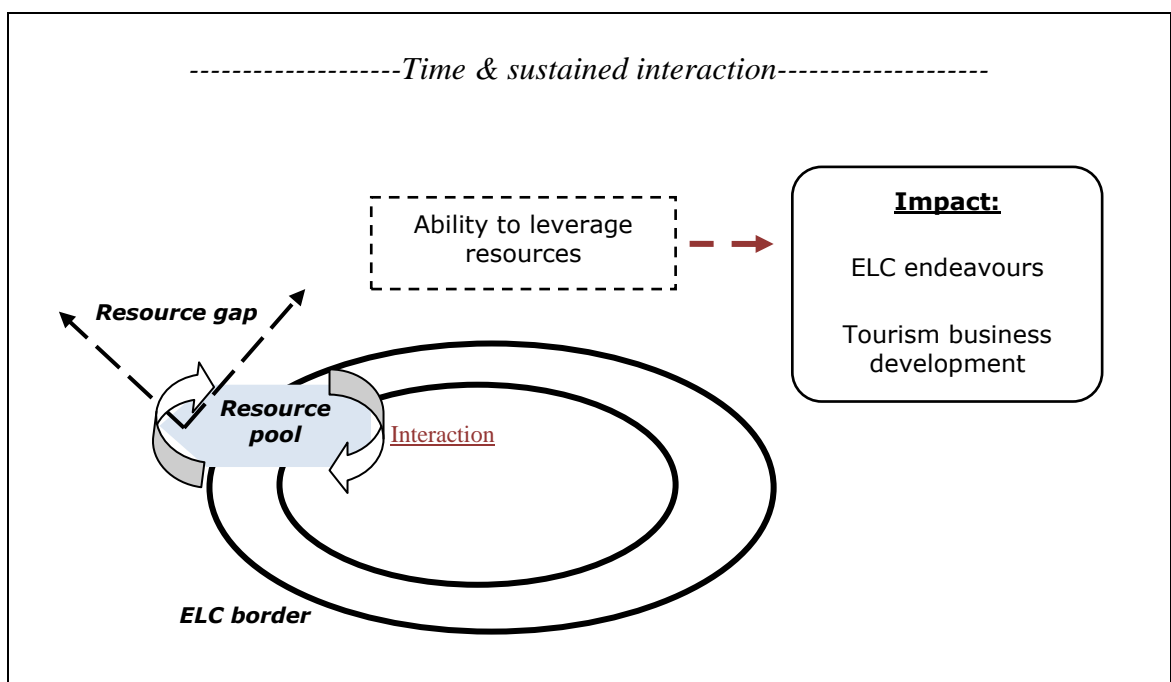
4.2.4   The sustainability of Evolving Learning Communities

Drawing from research in the tourism context, Michael (2007) contends that relational dynamics will determine the future success of micro-tourism clusters. Others highlight the importance of learning strategies (Morris et al., 2006) and the re-evaluation of future learning requirements (Bessant and Tsekouras, 2001; Kekale and Vitalia, 2003). Bessant and Francis (1999) suggest that in the absence of an external impulse to enter the learning cycle, learning communities will fade over time; hence while seeding structures such as FLN membership and resultant learning development can act as a

catalyst for ELC formation, the degree of learner autonomy, depth of learner involvement and interdependency, and the ability of ELC members to effectively leverage internal and external resources will ultimately determine the success and sustainability of the ELC.

4.2.5 Summary of key literature themes

The preceding discussion permits the extraction of key literature themes that are mapped below.

Table 4.3: Key learning themes from the literature

Theme	ELC environment
Learning membership & identity	Influenced by: • Depth of involvement & membership criteria; • Trust & histories of learning; • Lifestyle & business motivation; • Power structures; A range of identities contribute to practice; Identity is shaped between learning communities.
Learning broker	Role is to promote autonomy; encourage reflection & anchor learning in the practice of the ELC; Demonstrates visible learning competencies; Can stimulate buy-in & learning but success requires legitimacy; Central in maintaining an action/reflection balance.
Learning support	Different levels of support are likely to be required for members at different phases & depth of involvement.
Learning strategies	Learning emphasis must be maintained & managed, requiring a level of competency; Cooperative strategies are learned in action as relationships develop over time.
Learning relationships	Influenced by seeding structures & shared histories of learning; Differences in interpretation require negotiation; Process is positive unless it disrupts engagement; Require a delicate balance between interdependency & autonomy; Involve local manoeuvring with external environment; Multiplicity of perspectives equate to differing expectations; Lack of leadership & guiding structure at early stages could impact the psychological contract.
Learning resources & symbols	Embody shared learning & knowledge; Contribute to shared meaning over time; Value lies in the way that their creators interact.
Learning development	Learning develops through engagement in practice; Danger that action bias may push the learning agenda to the side, success is dependent on learning competence; Levels of learning competence are evident in the demonstration of higher level learning behaviours.

4.3 Proposed evolving learning community model

In seeking to address research objective four: to *refine the learning community model based on the research findings*, the key themes from the literature in relation to the elements and relationships that influence individual learning in ELCs after facilitated supports reach a conclusion can be incorporated into a preliminary Evolving Learning Community model (Figure 4.2) below.

Figure 4.2: Evolving learning community model
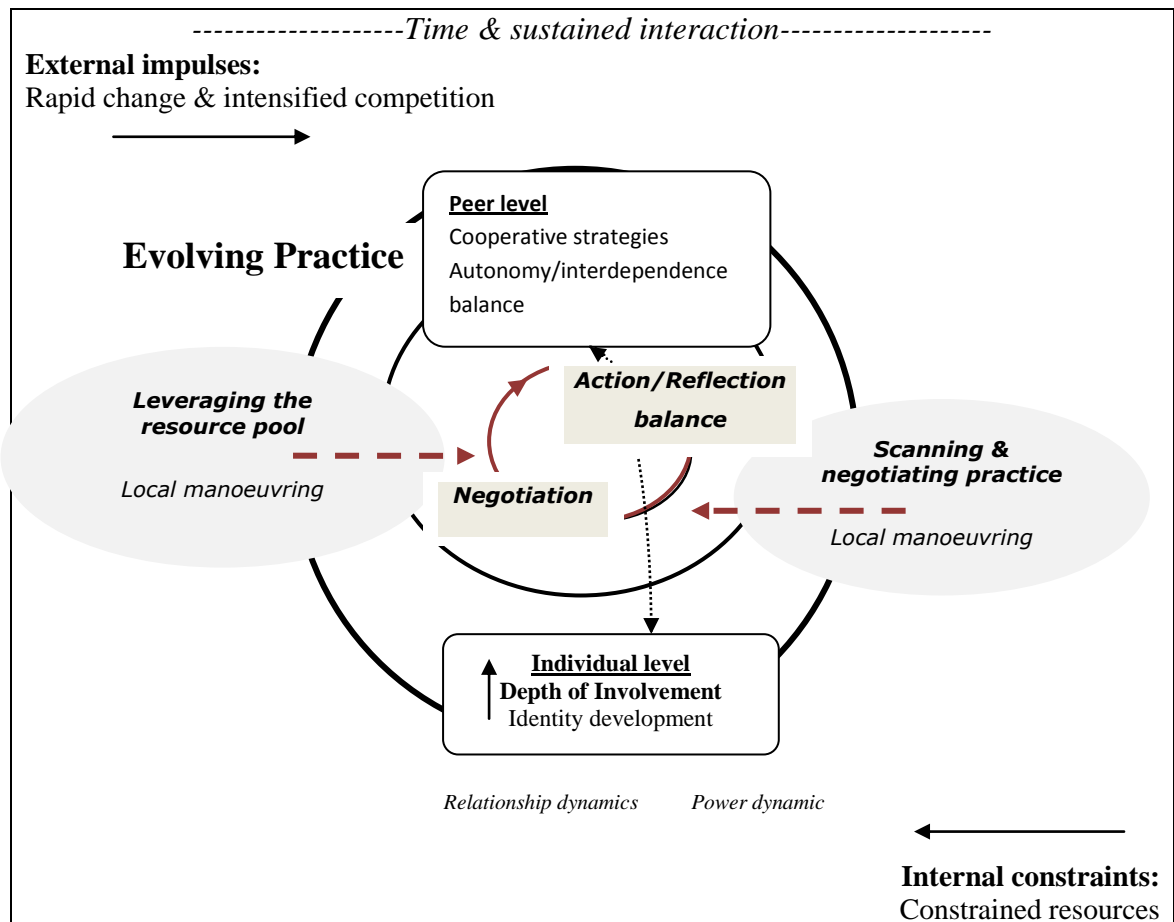
The ELC model (Figure 4.2) seeks to illustrate the evolution of the learning community from the FLN environment on to the ELC setting by incorporating the key themes emerging from the literature in relation to the learning structures and relationships that influence learning in the ELC.

While previous research incorporates the notion of 'close others' and their impact on micro-business owner/manager learning (for example Devins et al., 2005) the authors' note that the development of these relationships over time remain elusive and require investigation. Other researchers have modified models of learning in response to the growing prevalence of collaborative learning (see Beeby and Booth, 2000; Knight and Pye, 2005) although the majority of these are based upon collaborations in larger organisational settings. Some researchers have extended the CoP framework acknowledging the limitations of the CoP perspective in exploring management learning in networks (Haugen-Gausdal, 2008; Juriado and Gustafsson, 2007).

Primary research will inform and validate the model (Figure 4.2) through an interpretivist approach that will enable the researcher to 'induct theory' (Eisenhardt, 2007) through the completion of a longitudinal case study, a method previously utilised in the context of micro-firm learning model development (Devins et al., 2005; Kelliher, 2006) and SME network studies (Human and Provan, 2000). Although to the best of the author's knowledge, learning development has not previously been mapped from the micro-firm setting to the FLN setting and on to the ELC setting. This is the key contribution of this research.

4.4 Conclusion

This chapter explored the role of the FLN in the development of micro-firm owner/manager learning competence. It is apparent having reviewed the learning network literature in this chapter that the social learning structures of FLNs are sophisticated and can promote individual learning. Tabulating the elements and relationships that influence learning in the FLN, alongside those previously identified in the micro-firm chapter (Table 4.3) permits an enhanced understanding of individual learning development from the micro-firm on to the FLN environment. Further exploring these themes alongside the key components of the CoP perspective (practice, participation and identity), the available literature suggests that maintaining a learning emphasis in an independent setting such as the ELC may be challenging to say the least. Here, members must design and manage their own learning infrastructure and adapt to changes in their new learning environment and as the previous chapter demonstrates these activities require a level learning competence that takes time and facilitated support to develop in the micro-firm context.

The establishment of an ELC represents learning development in itself, however as the literature stands there is very little guidance in relation to what might influence such learning development or how it might be supported. The maintenance and management of independent learning communities over time also remains elusive and success appears to be dependent on the assumption that the learner has the competence to carry out a range of higher level learning behaviours that are required to sustain such a learning community. For example, an ELC's success will depend on the ability of its members to leverage available internal and external resources into capabilities for business and tourism development (as demonstrated in Figure 4.1).

Additionally the literature reveals that individual involvement in the community may be problematic for a number of reasons including but not limited to, differing levels of motivation and involvement, power dynamics and political engagement. Issues

including role and identity evolution, the pursuit of shared meaning, resource challenges and varying levels of participation were also discussed in the context of the ELC. It can be concluded from this review that different forms and levels of support are likely to be required once FLN supports reach a conclusion.

The ELC model (Figure 4.2) that emerges from the literary findings maps individual learning development from the autonomous micro-firm setting, to the facilitated learning network environment and on to the independent learning network arena, illustrating the evolution of a learning community over time. Completion of a longitudinal interpretive case study incorporating sub-studies for the purposes of cross-validation will further inform and validate the model.

The importance of context has been acknowledged in the learning literature. The next chapter considers the sector that the studied ELC is situated in – that is the Irish tourism sector.

Chapter Five

Irish Tourism – The business environment

5.0 Introduction

This chapter examines national and rural features of the Irish tourism business environment that the ELC operates in. Fáilte Ireland's Tourism Product Development Strategy (2010-2013) reported that tourism was the largest internationally traded services sector in Ireland, wherein micro-tourism businesses are described as the backbone of the industry (Department of Transport, Tourism and Sport, 2011). Although Ireland outperformed its European counterparts in the 1990s, it has become less competitive in this century in the tourism context.

In 2009, Forfás[6] reported in their end of year statement that 'global economic turmoil has created an unprecedented economic challenge for Ireland, the enterprise sector is facing a range of acute challenges including the cost and access to credit, shrinking domestic and export markets, and exchange rate volatility together with relatively high cost levels'. The global economic situation since 2008 has resulted in a contracting economy with unemployment currently standing at 14.2 percent (CSO, June 2011). As such, the harsh fiscal realities that faced Ireland over the duration of the case study and their influence on learning in the ELC are considered.

This chapter firstly provides an overview of the Irish tourism sector. The contribution of micro-tourism firms to the economy and to society is outlined. This chapter outlines cultural and ideological differences in the institutional forms of Irish micro-firms

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[6] Forfás is Ireland's policy advisory board for enterprise, trade, science, technology and innovation. Forfás is an agency of the Department of Jobs, Enterprise and Innovation.

(outlined previously in chapter two, p.13), in comparison with small businesses operating in other geographical locations, as advised by Gibb (2000) and Curran (2000). Other features that influence learning in this setting commonly referred to in the tourism literature, are also considered in greater depth in this chapter. A review of relevant Irish tourism business reports, economic reports and policy documents was also conducted in preparing this review.

5.1 The contribution of the tourism sector to the Irish economy and society

Tourism revenue stabilises the Balance of Payments and generates new streams of tax revenue. In 2005 it was estimated that fifty two cent from every Euro spent by out of state visitors ended up with the government (Fáilte Ireland HRD Strategy, 2005). In 2007, eight million visitors contributed €6.5 billion to national revenue (Irish Tourism Industry Confederation, 2008) and although tourism accounted for 4 percent of GNP in 2008, total tourism revenue decreased to 6.3 billion euro that year as visitor numbers declined for the first time in over seven years (Irish Hotel's Federation, 2009).

The potential for employment and regional development is reflected in state support for the industry that dates back to the 1920s (Baum, 1989). The major benefits of tourism activity to the economy include increased employment, generation of tax revenue and the contribution of tourism to rural economies and spatial balance (The Comhar Report, 2006; Tourism Product Development Strategy, 2007-2013). Additional levels of consumer spending from tourism create business opportunities for many other non-tourism specific enterprises; therefore tourism creates and supports employment right across the economy.

The calculation of tourism industry employment is complex. Figures for 2006 estimate that 249,000 people were employed (Fáilte Ireland, 2006) across a varied range of business types, of which seventy percent were defined as core tourism businesses. 2010 figures from the CSO estimate employment at 180,000 in the Irish tourism sector. This cohort has a diverse range of skills and educational and business backgrounds that reflect the complexities and diversity of the tourism product and increasing customer demands.

CSO figures report that there were over 6 million overseas visitors to the Republic of Ireland in 2010. This represents a decrease of 12.9 percent on 2009. According to the

Department of Transport, Tourism and Sport (2011), weather conditions and the impact of Icelandic volcanic ash that led the IAA (International Aviation Authority) to close international air space in April 2010 worsened these figures. The pace of decline slowed as the year went on, particularly for the North American and Continental European markets. Recently, Fáilte Ireland (2011) reported that whilst visitor volumes are up for some sectors in 2011, profitability is down in all sectors. Maintaining or increasing visitor volumes is coming at the expense of reduced prices, whilst increasing operating costs are decreasing profit margins. A very aggressive pricing strategy from the National Asset Management Agency[7] (NAMA) is a serious concern in the accommodation industry, as a number of larger hospitality establishments are under their control. As a result of these pressures, bed and breakfast providers are the hardest hit, with seven in ten reporting a decrease in profitability.

The tourism and hospitality sector continues to be a major economic force in the economy. Based on the most recent Balance of International Payments release (Q4 and 2010), Fáilte Ireland estimates that tourism Foreign Exchange Earnings for 2010 fell by 12 percent to €3.4 billion. However, Fáilte Ireland's tourism barometer (May 2011) reported the sentiment among some tourism operators that Ireland is turning a corner, and business is beginning to show slight signs of improvement. In this context, temporary reductions to the sector's VAT as part of a government initiative, as well as employer's PRSI and the abolition of travel tax in 2011 were positively received from the new Fine Gael and Labour coalition government as measures to support struggling small tourism operators. The visit of US President Barrack Obama and the royal visit from Her Majesty Queen Elizabeth II also boosted Irish tourism in 2011.

Fáilte Ireland's Strategy Statement (2005-2007) acknowledges the important role that tourism plays in developing rural economies and contributing to spatial balance. This is

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[7] NAMA is the Irish government's solution to the current (2008 – 2011) banking difficulties in Ireland. NAMA is an asset management company that acquire good and bad loans from participating institutions and manage (hold, dispose, develop or enhance) these assets (including bank owned hotels) with the aim of achieving the best possible return for the taxpayer on the acquired loans and on any underlying assets over a 7-10 year timeframe.

confirmed in the tourism literature (Lean, 1998; Irvine and Anderson, 2004) and achieved through local business relationships with suppliers and markets at a community level. At a local level, micro tourism businesses often provide employment where it would otherwise be limited (OECD, 2004). These businesses frequently represent the needs and interests of the local communities in which they operate, but they are found to lack influence at a government level often failing to appreciate the power and politics of local tourism policy partnerships. As such, regardless of their ability to mobilise resources, they often fail to effect change at a national level (Thomas and Thomas, 2006; Thomas et al., 2011).

5.2   Competitiveness of the Irish tourism sector

Ireland being an island nation situated on the periphery of an increasingly competitive European market managed to outperform its European counterparts in the 1990s, but has become less competitive over the last decade in the tourism context. Within a European framework, Ireland competed to keep costs under control as inflation and wages among other costs rose sharply in the boom years (Comhar Report, 2006). Small tourism businesses were under increasing pressure to compete constructively (Foley et al., 2007). In 2009, key tourism agencies including Tourism Ireland[8] sought to develop new key markets including China and India; and the Minister for Arts Sports and Tourism at the time, commented that Tourism Ireland's role in the promotion of a positive image of Ireland had consequences beyond that of the tourism industry extending to the wider Irish enterprise sector (Fianna Fáil Ard Fheis, 2009). Hopeful that 'staycations[9]' would also be a popular consumer choice for price conscious tourists; a home holidaying marketing campaign was undertaken with the support and encouragement of the Minister for Arts Sports and Tourism (THRIC conference, 2009). According to the Tourism Renewal Group (October, 2010), the four million Euro investment in a domestic marketing campaign was successful with strong domestic demand reported. Accommodation statistics around this time revealed a worrying trend however, demonstrating a 20 percent decline in the use of guesthouse accommodation and a 32 percent decline in bed and breakfast accommodation from the period January 2008-2009. During this time, more than half of the smallest of these tourism businesses remained closed for a month or two due to falling demand (CSO, 2009).

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[8] Tourism Ireland is the all-island tourism marketing company established on foot of the Good Friday Agreement (1998) by the then Bord Fáilte (now Fáilte Ireland) and the Northern Ireland Tourist Board (NITB).

[9] The term 'staycation' refers to holidaying at home rather than abroad. It encompasses short trips to local, regional or national attractions.

Remaining competitive requires the improvement of the '*quality and appeal of the tourism product'* (Fáilte Ireland, Tourism Product Development Strategy, 2007-2013: 1). The development of the tourism product relies on the people that deliver the product; and it follows that expanding the skills, competencies and capabilities of the people involved in delivering the tourism product is key for success (Baum, 2009). The development of tourism's human resources is not without its challenges however, as the learning needs of this diverse cohort are highly differentiated. Coupled with severe resource constraints and a suspicion of formal academic training (a view supported by: Hannon et al., 2000; Morrison and Teixeira, 2004; and Smallbone, 1990), meeting the learning needs of small and micro-tourism business owner/managers is a major challenge.

A high-level Tourism Renewal Group (TRG) was established in late 2008, to review and renew Ireland's tourism strategy as set out in 'New Horizons for Irish Tourism: An Agenda for Action 2003-2012'. The Tourism Renewal Group's role was to examine tourism policy and programme priorities in light of the challenges facing the tourism sector and taking cognisance of unfolding Irish economic developments, including the exceptionally challenging global and domestic economic conditions, the deterioration in the public finances and the Government's Statement on Transforming Public Services. The TRG reported to the Minister in 2009, a framework for action that set out key steps to be taken to assist in ensuring that tourism continues to be a major industry for Ireland and the strategies necessary to maintain the long-term sustainable growth of Irish tourism (Department of Arts, Sports and Tourism, 2009). In July 2010, the Minister for Tourism, Culture and Sport, Dr Leo Varadkar announced the establishment of a Tourism Renewal Implementation Group to oversee and drive actions on measures to support tourism in Ireland. This new group is chaired by the Minister and includes tourism agency representatives, departmental officials and representatives of a range of interests within the tourism industry.

Economic developments led to a shift in the focus of Government policy, with a growing emphasis on enterprise viability and maximisation of employment. In 2010, the TRG identified the following priority policy issues:

1. The restoration of sustainable levels of business lending, in particular to ensure availability of working capital for viable tourism businesses given the seasonal nature of the business;

2. Measures to restore and enhance access to overseas markets, in particular to redress the adverse impact of the air travel tax on carrier services;

3. Continued investment in overseas marketing at national level;

4. Measures to address and reduce enterprise costs, including local authority rates and charges, energy and utility costs and the cost of labour - noting in particular the TRG recommendations in relation to the costs of employing those not full-time in the labour force (e.g. students) and in relation to the Joint Labour Committee (JLC)[10] system.

There is a notable absence of a training and development emphasis in recent policies.

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[10] The purpose of Joint Labour Committees was to regulate conditions of employment and set minimum rates of pay for employees in certain sectors of employment. It was an independent body made up of equal numbers of employer and worker representatives appointed by the Labour Court, with a chair appointed by the Minister for Jobs, Enterprise and Innovation. The JLC had the power to enforce legally binding employment regulation orders (ERO's) but these ERO's ceased to have statutory effect on 7 July, 2011.

5.3   Irish micro-tourism firms

The tourism sector comprises a wide range of small enterprises which are predominantly (over ninety percent) micro-firms (Fáilte Ireland HRD Strategy, 2005); this statistic is reflected world-wide (Baum, 1999; Reijonen and Komppula, 2007; Thomas, 2007). The importance of the role that micro-firms play in the tourism sector has only begun to emerge in the literature over the last few years. Thomas and Thomas (2006) highlight the role that micro-firms play in shaping the tourist experience and influencing the development and reputation of tourist destinations, while Morrison and Teixeira (2004) emphasise the importance of micro-firms in maintaining the future market for tourism.

The Report of the Small Business Forum (2006) highlighted a weakness in Irish entrepreneurial performance highlighting a lower proportion of nascent entrepreneurs[11] in comparison to other entrepreneurial countries. This statistic is mirrored in micro-tourism firms, where the majority are not growth focused (O'Dwyer and Ryan, 2000) - a characteristic typical of most micro-businesses (Devins et al., 2005). It is confirmed in the tourism literature that entrepreneurial tourism firms are in the minority (Getz and Paterson, 2005; Morrison, 2006; Page et al., 1999; Thomas et al., 1998).

The tourism literature also reports many examples of the owner/ manager's desire to maintain their business for lifestyle motivations (Ateljevic and Doorne, 2004; Getz and Carlsen, 2005; Hall, 2004; Marchant and Mottiar, 2011; Morrison and Teixeira, 2004; Thomas, 2007). Previous research demonstrates that there is a continuous trade-off between growth and revenue on the one hand, and quality of life on the other. As a result non-financial goals are more commonplace than profit maximisation (Gray, 2002;

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[11] The term nascent entrepreneur refers to entrepreneurs at an advanced phase of business.

Reijonen and Komppula, 2007). Dewhurst et al. (2007) found that lifestyle-orientation results in a pre-disposition to emphasise social and personal goals over learning development goals, an issue previously identified as problematic in the micro-firm learning context (Noel and Latham, 2006). This pre-disposition has been highlighted in the tourism literature, where civic responsibility (Thomas and Thomas, 2006) and a sense of community (Ateljevic and Doorne, 2000) are reported as motivations for business ownership and development.

Managerial constraints in smaller tourism firms have been well reported (Baum, 1999; Hannon et al., 2000; Morrison and Teixeira, 2004) and are compounded in micro owner-managed tourism businesses that frequently require round the clock owner involvement in the business (see for example: Morrison and Teixeira, 2004).

Seasonality is also a concern for many micro-tourism organisations (Irvine and Anderson, 2004) particularly those situated in rural locations. In Baum and Hagen's (1999) study of seasonality in peripheral tourism destinations, the authors contend that peripheral locations suffer from seasonal demand distortions for the tourism product. The authors also highlight efforts including plans to extend tourism seasons that require a level of innovation and creativeness and associated learning capacity to achieve. Overcoming these issues reinforces the value of coopetition in the small tourism context (Brandenburger and Nalebuff, 1997; Michael, 2007; Tinsley and Lynch, 2007).

Fáilte Ireland's HRD Strategy (2004) '*Competing through people: A human resource development strategy for Irish tourism'*, rightly identifies diversity as one of the defining features of the Irish tourism industry. The sector comprises a broad spectrum of businesses ranging from core tourism businesses such as accommodation provision and tourism services and attractions, to other tourism related businesses including restaurants and licensed premises. The tourism product is complex and strong market interdependence is a feature of these firms (Pavolich, 2003).

5.3.1 Developing tourism's human resources

Tourism is an industry that is largely dependent on people to deliver a quality tourism service, a dependence that is set to continue for the foreseeable future (Baum, 2009). The contrasting nature of tourism businesses, discussed earlier, provides a major learning and training challenge for policy makers and providers of tourism training and development offerings. This challenge is reflected world-wide (Becton and Graetz, 2001) and there is increasing emphasis and attention being given to the development of human resources in the tourism industry (Jithedran and Baum, 2000).

The case for state involvement in Human Resource Management (HRM) in the tourism industry has been established in the literature for reasons of economic growth and also in response to the inability of many small and micro-tourism businesses to carry out an effective approach to the development of human resources themselves (Baum, 1999). In the 1980s, the Irish government's plan for national recovery singled out a few key industries' including tourism that would drive future prosperity. However Baum (1989) contended that the capacity of the industry to meet targets set out in the 1980s national recovery plan and other key government initiatives of this decade were challenging in an industry characterised by diversity and low levels of training.

In 2005, Fáilte Ireland's HRD strategy (2005) highlighted the difficulties faced by smaller firms which hinder their access to developmental learning and management development. As such they struggle to provide an environment where developmental learning occurs. Resource poverty was identified as a key barrier to learning in the tourism sector, where constrained resources resulted in gaps in managerial competencies (Morrison and Teixeira, 2004; Kelliher and Reinl, 2009). Tourism owner-managers typically perceive practical experience as being of more relevance to their business than formal education (Morrison and Teixeira, 2004) and this is reflected in research that reveals relatively few small business owner-managers have formal

education (Hannon et al., 2000; Smallbone, 1990) this is also true in the tourism context (Morrison and Teixeira, 2004).

Over the last decade, several Irish government reports have made reference to learning, training and development support requirements and challenges in the micro-firm tourism context:

- The National Tourism Policy Review Report (2004) - recognised the important role that the government had to play in supporting the enhancement of business capability and capacity of owner-operated small scale tourism businesses;

- The Enterprise Strategy Group Report 'Ahead of the Curve- Ireland's Place in The Global Economy' (2004) - cited the effective development of management capability in the small-firm context as an essential condition for sustainable enterprise;

- Fáilte Ireland's HRD Strategy (2005) - highlighted the difficulties faced by smaller tourism firms which hinder their access to developmental learning and management development and recommended that small business owner/ managers' participate in learning networks to enhance their skills and achieve a premium tourism product;

- Expert Group on Future Skills Needs (2006) – highlighted many of the problems associated with traditional training and development approaches, including the failure to take account of entrepreneurial education demands;

- Fáilte Ireland's Tourism Product Development Strategy (2007-2013: 9) reiterated many of the previously identified resource issues that impact learning in the micro-firm tourism sector;

- The Tourism Product Development Strategy (2007-2013) – acknowledged that management capability and business development are essential components in the delivery of a successful tourism product;

The Tourism Learning Networks (TLNs) initiative was established in 2006 as a response to Fáilte Ireland's acknowledgement of '*the unique learning difficulties and requirements of smaller tourism businesses*' (Fáilte Ireland Human Resource Development Strategy for Irish Tourism, 2005: 75). This initiative reflected a coordinated and collaborative approach to small-firm learning and development. It represented a marked departure from previous government and academic initiatives that had been criticised by the small-firm research community in the past (Matlay, 1999; Perren, 2000). The TLN initiative was in essence, a response to calls for collaboration referred to in the tourism literature (see for example Denicolai et al., 2010) wherein the benefits of tourism network participation in relation to learning have been established (Ahmad and Morrison, 2004; Gibson and Lynch, 2007; Halme, 2001; Morrison et al., 2004; Tinsley and Lynch, 2007).

Since 2006, 540 tourism owner-managers participated on the TLN programme. The programme was recognised with a Taoiseach's[12] public service excellence award and an outstanding achievement award at the Irish Institute of Training and Development (IITD) National Training Awards in 2008. The programme was accredited with an optional level 6 HETAC[13] certificate and 299 participants were awarded with the Certificate in Tourism Business Practice from 2006-2009. The ELC case community

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[12] Taoiseach is the official title used for the head of a government in the Republic of Ireland. It comes from an old Irish word meaning leader.

[13] HETAC (the Higher Education and Training Awards Council) is the qualifications awarding body for third-level education and training institutions outside the university sector.

was established by a group of former TLN members after completion of the year long programme.

The key objective of the TLN initiative was learner autonomy that would underpin future co-operative activity and business development in tourism communities. The autonomous establishment of several tourism learning communities since TLN participation indicates a level of success. However the elements and relationships that influence learning, as these communities evolve are not understood. An exploration of learning community evolution is the purpose of this research study.

5.3.2 Looking forward

Recommended actions of Fáilte Ireland's HRD Report (2005) include 'sweating' existing tourism assets, specifically its people. It is the author's contention that the opportunity exists to leverage the resources and learning capabilities of tourism communities in pursuit of tourism destination development. The Tourism Renewal Group's Report '*A Strategy for Renewing Irish Tourism, 2009-2013*' acknowledges the need to re-engineer the HRD strategy in light of recent economic and labour market developments, and underpins this researcher's ethos in relation to the future of tourism micro-firm development.

Many of the latest national strategy reports reflect a strong emphasis on collaborative learning and innovation in tourism hubs and destinations (Fáilte Ireland's *Tourism Product Development Strategy*, 2007-2013; The National Development Plan (NDP) 2007-2013; and Fáilte Ireland's *White Paper on Innovation*, 2009). Central to the accomplishment of these objectives is the success and development of the learning relationships that constitute tourism learning communities (Reinl and Kelliher, 2010). The underlying assumption is that innovative activity relies on the evolution and development of learning communities (Mitra, 2000) but that this development is '*not to be seen as a simple and spontaneous event*' (Novelli et al., 2006: 1150), thus it requires further research and support in the tourism learning community context.

5.4 Conclusion

The research study comprises a longitudinal case study of an ELC operating in a rural tourism setting in the South-West of Ireland. The purpose of this chapter was to examine key national and rural features of the Irish tourism business environment, to provide a contextual understanding of the ELC's operating environment and potential influences on learning within.

Having reviewed the tourism literature, it is clear that micro-businesses in the tourism sector share many of the features previously uncovered in the micro-firm chapter. These include: a dominant owner/manager role that demands a wide range of skills; resource poverty that constrains learning and development and little emphasis on business growth. One feature that defines the tourism sector is its diversity and this facilitates effective coopetition. Tourism micro-firms are characterised by low levels of formal training and practical experience is valued here, much like the findings in the micro-firm chapter revealed. More unique to the tourism sector however are the influences of seasonality and lifestyle motivations. These features require further consideration in this study.

As outlined above, small tourism businesses were under increasing pressure to compete over the last decade. Government support for tourism business development reflects the importance of the sector to the Irish economy and the inability of small tourism firms to engage effectively in HRD. In answer to calls for more collaborative learning models for this diverse cohort of learners, tourism learning networks were delivered throughout Ireland from 2007 -2010. Many of the rural tourism strategies that emerged at ground level as a result of this collaborative networking model, such as plans to extend tourism season, require a level of innovation, creativeness and associated learning capacity to achieve. While more recent national strategy reports have a stronger emphasis on collaborative learning and innovation in tourism communities, they offer little support in terms of the learning development required for micro-businesses to effectively achieve the objectives they set out. Central to the accomplishment of these objectives is

the success and development of the learning relationships that constitute tourism learning communities (Reinl and Kelliher, 2010). The underlying assumption is that innovative activity relies on the evolution and development of learning communities but as the literature demonstrates this development requires higher level learning competencies (as previously outlined in chapter four). Evidence of ELC success in the longer-term does not yet exist and the elements and relationships that influence learning in such independent learning communities remain unexplored.

The criteria outlined in this chapter are discussed in the forthcoming case discussion and analysis (chapter seven, p. 157) and in the case community profile (section 7.1, p. 158).

Chapter Six

Research Methodology

6.0 Introduction

The purpose of this chapter is to examine the theoretical factors and philosophical positions that influenced the research design for this study. Taking the research question and aims as a point of departure, methodological philosophies are debated. The research design, methods and associated techniques employed in the study are outlined.

The research site is described and data management and analysis approaches are detailed. Rigour is also addressed as it relates to the research design and any ethical issues arising from the researcher's choices are discussed.

6.1 Research question and research objectives

Research questions guide the entire research process (Bryman, 2004) and the research objectives define the boundaries and scope of the study (Zikmund, 2000). The principal research question that this thesis seeks to answer is: *What elements and relationships influence individual learning in Evolving Learning Communities (ELCs), after facilitated learning supports reach a conclusion*? The research question and objectives emerged as a result of a previous research study (see appendix A, p. 319) that focused on individual learning in a facilitated learning network environment. After the FLN programme reached a conclusion, the researcher was aware that several groups of former FLN members had continued to network and work together in an independent learning context. Returning to the literature there was a clear gap in relation to understanding the learning dynamic in ELCs. The research objectives that emerged from this process are:

1. To explore the construction of the social and learning infrastructure in an evolving learning community (ELC);
2. To examine the development, maintenance and management of the learning relationships and structures in the ELC over time;
3. To map the factors supporting and impeding individual and collective learning in the case community;
4. To refine the learning community model based on the research findings.

As highlighted in the literature review, learning networks are regularly cited as a means to create sustainable competitive advantage in small firms (Kelliher et al., 2009; Lesser and Everest, 2001; Morrison et al., 2004; Tinsley and Lynch, 2007) by facilitating learning among entrepreneurs (Ahmad, 2005; Florén and Tell, 2004; Taylor and Thorpe, 2004; Wing Yan Man, 2007). Once established, the question remains whether such networks can transition from facilitated learning environments to become independent learning communities in the longer term. Little is known about the formation, maintenance or success of these learning relationships after facilitated

learning structures and supports reach a conclusion (Bessant and Francis, 1999; Kelliher and Reinl, 2011; Reinl and Kelliher, 2010). What is known is that these Evolving Learning Communities (ELCs) are devoid of formal structures, thus autonomy in their structural and relational reasoning is required. The literature review demonstrates that the 'learning value' of these (ELC) relationships beyond a facilitated learning setting remains elusive (see Table 4.3, p. 85) and requires exploration. Effective management and maintenance of such learning structures and relationships also require a level of learning competence among community members (Florén and Tell, 2004; Toiviainen, 2007; Wing Yan Man, 2007) which has not been studied to date.

Based on the above synopsis, this research question is new to both micro-firm and learning network research. To the best of the author's knowledge, the construction of the social and learning infrastructure in an evolving learning community has not been studied to date in this environment, nor have the subtle culture, structure and informal relationships evident in such communities. Finally, longitudinal studies are rare in the micro-firm and the tourism context, despite multiple calls for prolonged research in these organisations/ contexts.

6.2   Philosophical perspective

Philosophical perspectives relate to assumptions about the social world and how it can be investigated. Burrell and Morgan's framework (1979) permits ease of comparison between the different research traditions, however, a number of philosophical positions lie between the extremes depicted below (Figure 6.1).

Table 6.1: Research assumptions – The subjective/objective dimension

Subjectivist approach ⟷		Objectivist approach
Nominalism: The social world is created by the individual concerned	**Ontology:** What can & does exist	**Realism:** A single reality exists independent of the individual's view
Voluntarism: Free will plays a role in the relationship	**Human nature:** Relationship between human beings & their environment	**Determinism:** Relationships are determined by external environmental forces
Interpretivism: Knowledge has to be personally experienced	**Epistemology:** The nature of knowledge	**Positivism:** Knowledge can be acquired
Ideographic: Emphasises the analysis of subjective accounts revealed through qualitative explanation gleaned inside a given situation	**Methodology:** How research is/will be constructed	**Nomothetic:** A deductive approach that seeks explanation through the analysis of causal relationships to allow the testing of hypotheses & the construction of generalised laws

Adapted from: Burrell and Morgan (1979)

The subjective and objective approaches are defined by key research assumptions relating to ontology, epistemology, human nature and methodology. These assumptions influence the methodology employed by researchers (Denzin and Lincoln, 2008).

6.2.1   Ontology

Ontology relates to what can and does exist. An ontological stance conveys what an individual believes regarding social and physical reality (Chua, 1986). Holden and Lynch (2004: 399) suggest that the researcher's view of ontology '*is the cornerstone to all other assumptions*'. Ontology is outlined in Table 6.1 from two opposing viewpoints, nominalism and realism. Nominalists view the social world as being created by the individuals' concerned. Conversely realists hold the view that a single reality exists; a hard and knowable reality that exists independently of an individual's appreciation of it (Burrell and Morgan, 1979). Bryman (2004) contends that the research question embodies the ontological position of the researcher and influences the design of the study. Drawing from the social learning perspective (Lave and Wenger, 1991) learning is influenced, interpreted and constructed by members situated within a community of practice. Considering this theoretical base, a nominalist ontology is apparent in this study.

6.2.2   Human nature

This research assumption relates to the relationship between human beings and their environment. Assumptions made about human nature inform the philosophical underpinnings of the research and subsequent research design (Morgan and Smirich, 1980). The two opposing positions in this regard, are determinism and voluntarism. Positivists hold the view that the relationship between human beings and their environment is deterministic, in other words the relationship is determined by external forces operating in that environment (Burrell and Morgan, 1979). At the other end of the spectrum, voluntarism assumes the belief that free will plays an active role in the relationship between human beings and their environment.

As past FLN members established the learning community and are collectively responsible for maintaining the learning momentum within the ELC, a voluntarist perspective is evident in this context. Although context undoubtedly influences learning

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(Brown and Duguid, 1991; Lave and Wenger, 1991) individual learners, through their perceptions, motivations, and levels of engagement also shape learning and practice within the ELC (Brown and Duguid, 1991; Lave and Wenger, 1991) reinforcing the appropriateness of a voluntarist perspective in this study.

6.2.3   Epistemology

Epistemology refers to assumptions about knowledge, how it can be obtained and how it can be communicated to others. Extreme views in the epistemological debate relate to whether knowledge can be acquired (positivism) or if knowledge has to be personally experienced (interpretivism) by the individual. At different points on the subjective/objective continuum (Figure 6.1) the nature of what constitutes 'adequate' knowledge will differ (Morgan and Smirich, 1980). Research, from an interpretive stance, concentrates on understanding and interpretation (Gummesson, 1991).

Kolb (1984) highlights a requirement for epistemological enquiry in relation to learning, as learning and knowledge are related processes. Gibb (2002: 255) argues that moving away from cognitive notions of learning towards the recognition of the importance of emotions, feelings and motivation in the learning process is a fundamental epistemological challenge. From Wenger's (1990: 148) perspective *'knowledge cannot be meaningfully considered apart from the community to which it belongs because it "lives" there ...'.*

The opposing epistemological viewpoints of positivism and interpretivism are now discussed.

6.2.3.1 Positivism

The ontological assumption underlying positivism is that an unchanging objective reality exists which should be measured using objective methods. Separation of the subject from the object is assumed. As such, the researcher is viewed as independent, maintaining a distance from the research (Gummesson, 1991). Objective value-free measurement is valued from this perspective and scientific knowledge is considered to consist only of facts (Walsham, 1995) and not of subjective accounts that seek to explore the meaning that people attach to their reality (Easterby-Smith et al., 1991; Gill and Johnson, 2002; Silverman, 1998).

In a recent review of small business and entrepreneurial research, Blackburn and Kovalainen (2009: 130) acknowledge the key contributions that the positivist paradigms contribute to the field but call for greater attention to be given to the '*exploratory mechanisms underlying social and economic phenomenon*'. The authors go on to recommend an interpretivist social mechanisms approach to theory building in this context. It is evident that the closeness required for this research study '*is at variance with the positivist viewpoint*' (Hill and McGowan, 1999: 10), reinforcing the appropriateness of an interpretivist approach.

6.2.3.2 Interpretivism

The interpretivist perspective acknowledges that people differ and are not merely objects of social science and acknowledges that facts and values are intertwined (Walsham, 1995). Gathering facts in pursuit of a definitive truth is not the researcher's objective; the goal is '*to appreciate the different constructions and meaning that people place upon their experience*' (Easterby-Smith et al., 1994: 24). In essence, these meanings embody a socially agreed understanding.

To understand the meaning that individual learner's attach to their own reality (Janesick, 2000) one must acknowledge that learning occurs as a result of relations between people participating in practice (Gibb, 1992; Lave and Wenger, 1991) so understanding the learning dynamic between individuals within the context of the ELC is an important aspect of this study, as acknowledged by others (Brown and Duguid, 1991; Down, 1999; Lave and Wenger, 1991). As knowledge is constructed, supported and transformed by and in the community where it belongs (Wenger, 1998) an interpretivist approach is required in order to explore the elements and relationships that influence learning in ELCs. This epistemological perspective is congruent with the aims and objectives of this research study and is reflected in the methodological approach that follows.

6.2.4 Methods

The philosophical perspective of the researcher influences the method, predisposing the researcher towards either a nomothetic or ideographic approach. Burrell and Morgan (1979) contend that idiographic approaches emphasise the analysis of subjective accounts that are revealed through qualitative explanation gleaned inside a given situation. Nomothetic approaches are ineffective in attempting to analyse the *'holistic interaction of real people in real organisations'* (Luthans and Davis, 1982: 382). This research study draws from the social learning perspective. Luthans and Davis (1982) conclude that research based on such a theoretical base cannot fit a nomothetic approach as it offers limited insight. This perspective is also supported in the micro-firm learning context (Curran and Burrows, 1987; Down, 1999) and is further endorsed from a network tourism perspective (Morrison and Teixeira, 2004). Understanding learning dynamics in an evolving learning community requires an ideographic approach that places emphasis on subjective accounts that can reveal the social learning process over time. Interpretive approaches have been approved from a collective learning perspective (Down, 1999; Lave and Wenger, 1999; Thompson, 2005). Considering that the nature of the research problem: *What elements and relationships influence individual learning in Evolving Learning Communities (ELCs) after facilitated learning supports end?* It is evident that the researcher would adopt an interpretivist approach.

In summary, the philosophical position of this research study is underpinned by an interpretive epistemology. Adopting this position the researcher accepts that knowledge is created through the interpretation of meaning within a social setting, a central tenet of Lave and Wenger's (1991) social learning perspective. A nominalist ontology acknowledging the social construction of learning is assumed and following this assumption the researcher's view of human nature is primarily voluntaristic.

6.3   Research method selection

Research methods move an inquiry from the research assumptions to the research design and data collection phase. As a point of departure, the research objectives and component elements that guided the process of research method selection are outlined. Taking cognisance of insights from the literature reviewed, it is evident that this learning study requires a phenomenological, subjectivist approach for a number of reasons:

- Methodological approach requires closeness between the researcher and the owner/manager (Curran and Blackburn, 2001; Devins et al., 2005; Down, 1999; Gibb, 1983; Grant et al., 2001; Hill and McGowan, 1999).

- Pursuit of the research aim requires that a range of experiences, attitudes, opinions (Patton, 1990) and preferences (Devins et al., 2005) are captured.

- The nature of the study requires the observation of social learning interactions, discussion and negotiation (Brown and Duguid, 1991; Lave and Wenger, 1991).

- Smaller samples (selected on criteria of community structure, interaction and other relevant theoretical dimensions) are likely to facilitate greater understanding of the research issues of this study (Chell and Baines, 2000).

While qualitative research can be positivistic (Yin, 1994) or interpretive (Eisenhardt, 1989) the requirement to elucidate the interpretation of meaning and experience through subjective accounts is important in pursuit of the overall aim of this study. As such, a variety of qualitative methods have been considered. These include action research, ethnography and case study research.

6.3.1 Action research

Action research is distinguishable from other interpretive approaches in terms of its purpose. Engineering and supporting change through deliberate action is a central tenet of the action research process (Coghlan, 2007; Robson, 2002; Zuber-Skerritt and Perry, 2002). Dual benefits of improvement to practice and contribution to theory can be attributed to the approach (Gummesson, 1991; Zuber-Skerritt and Perry 2002). Participation and collaboration between the researcher and those being researched is also a central feature of this research method (Robson, 2002) and is one that enables the development of others during the process (Susman and Evered, 1978; Zuber-Skerritt and Perry, 2002).

The use of action research as a methodological approach in a learning context can be traced back to the 1920s and the work of the Hawthorne experiments. Since then, many contemporary researchers have demonstrated its value from a learning research perspective (Brannick and Coghlan, 2007; Coghlan and Coughlan, 2006; Mumford, 2001). While the researcher acknowledges that an action research approach offers the opportunity to combat some of the challenges associated with researching learning in a small firm context (as outlined by Grant et al., 2001) a number its features render it inappropriate as a research method for this study. Significant researcher involvement is required in pursuit of the aims of this study and the researcher's influence on the studied environment is acknowledged. However, deliberately influencing the learning community and the learning development of its members would be inappropriate and incongruent with the aims of this exploratory research study. Considering the above, action research was not considered to be an appropriate approach for this study.

6.3.2 Ethnography

Ethnography is concerned with descriptions of social patterns and participant observation is at the core of this approach (Gummesson, 1991), where the researcher spends a lengthy period of time in close proximity to the phenomenon being studied.

Analysis involves the explicit interpretation of the meanings and functions of human actions (Atkinson and Hammersley, 1994) that result in the ethnographer gaining a better understanding of the phenomenon than could be gleaned from other approaches (Tedlock, 2000). Ethnography, specifically observation, is a key technique adopted in the research design of this study, allowing the author to explore the elements and relationships that influence learning in the ELC.

Participant observation has its roots in the social anthropology of the early twentieth century and it emphasises the meaning that people attach to their actions (Saunders et al., 2007) because '*human beings exist within the realms of meaning as well as in the material and organic realms…*' (Tedlock, 2000: 470). Research approaches that reflect the ethnographic tradition have been recommended from a learning perspective (Down, 1999) as they offer the best opportunities to the researcher for closeness and experiential learning (Curran and Burrows, 1987; Grant et al., 2001).

6.3.3   Case study research

Eisenhardt (1989: 534) defines the case as a '*research strategy which focuses on understanding the dynamics present within single settings*'. Yin (1994: 13) defines the scope of a case study as '*an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomena and context are not clearly evident*'. According to Stake (2000: 435) the case is defined by an interest in studying it, as such it '*is not a methodological choice but rather a choice of what is to be studied*'. In the context of this research, the case study is a research strategy and resultant enquiry that explores the elements and relationships that influence individual learning in an ELC, after facilitated learning supports end.

The interpretive case study offers a number of benefits in the context of this research study. It permits the researcher to capture rich contextualised data (through observation, interviews, field notes and reflective diary) that reveal the meaning of experience from the perspectives of learners situated within the ELC (Stark and Torrance, 2006). These multiple perspectives and insights permit the identification of important patterns and themes (Eisenhardt, 1989) that provide rich insights and facilitate the holistic analysis required to understand the structures, rituals, repertoires and relationships of a CoP (Benzie et al., 1994).

Learning is a dynamic process, developed on the basis of an element of continuity (Pettigrew, 1990) on which knowledge rests while time passes. Florén (2003) contends that longitudinal observation is the ultimate way to study learning, while others support this perspective, as changes and developments can be captured over time (Bryman, 2004; Pettigrew, 1990). Longitudinal observation featured in Lave and Wenger's (1991) seminal work and Wenger's (1998) later work on siutated learning. It has been used extensively in CoP research (for example: Thompson, 2005). This approach is considered particularly useful in an evolutionary network context (Human and Provan, 2000) as it affords the researcher time to develop case analyses that can enlighten the dynamic process of learning and development (Toiviainen, 2007).

Based on the discussion above, the longitudinal interpretive case method is considered appropriate for this research study as it provides the potential to capture a dynamic social learning process over time.

6.3.4 Primary research approach

Having established the appropriate research method (the longitudinal interpretive case), the methodological structure is now outlined. There are numerous and divergent approaches to case research design depending on the philosophical stance of both the researcher and methodological advisors. The merits and shortcomings of the various approaches are briefly discussed as they relate to this research study.

6.3.4.1 Case research design approaches

Researchers can choose to adopt a single or multiple case approach, dependent on the aim of the research and the nature of the case. This choice is a fundamental research design issue intertwined with methodological complexities. The single case describes a phenomenon in rich detail (Siggelkow, 2007) and it is frequently chosen on the basis that the case is particularly revelatory (Eisenhardt, 2007; Yin, 1994). It is often criticised for lacking a sufficient number of cases to be generalisable (Eisenhardt, 2007; Tellis, 1997). In this context Stake (1994: 238) advises that the wish to generalise should not take preference over understanding the important features of the case.

Yin (2003), Haugen Gausdal (2008), Miles and Huberman (1994) and Stake (1995) all suggest the embedded single case design as an approach that can enhance insights into the single case. Here, the case comprises sub-units that equate to units of observation (UOO). These UOO represent different levels of analysis (LOA), which in this study amount to the individual learner's interaction with the ELC and its incumbent sub-committees (UOOs) and their respective members. Reported benefits of the embedded design include providing more focus (Haugen Gausdal, 2008; Siggelkow, 2007), and a greater opportunity to explore the research issues in more depth (Yin, 1994, 2003) by illuminating processes and outputs in context (Haugen Gausdal, 2008). As articulated by Van Wynsberghe and Khan (2007: 90): '*the interpretivist paradigm appears to favour a delineation of unit of analysis from the case itself through the description and*

attempt to understand the conditions under which the concept, relationship, or event *"got the way it is"*", linking closely to the research objective in this study. While this research study focuses on individual learning and the interactions between individual learners and other members of the ELC, the unit of analysis (UOA) remains the individual (as outlined in figure 6.2).

Figure 6.1: The ELC case and context

Research site: An ELC situated in the South-West of Ireland

Single case study: The evolution of individual learning within an ELC

Unit of analysis (UOA): = Individual learners (55)

Levels of individual learner interaction & depth of involvement

Community level (Case Study)

Levels of analysis (LOA) | Sub-group level (UOO)

Individual level

Context: Tourism & business environment

The ELC comprises naturally evolved sub-committees; these sub-groups serve as units of observation (UOO) within this case design (Figure 6.2). Theoretical sampling[14] is advised for research that is theory building in nature as it '*necessitates building interpretive theories from the emerging data and selecting a new sample to examine and elaborate on this theory*' (Marshall, 1996: 523). The guiding conceptual framework (Figure 4.2, p. 86) suggests that learner role and identity and depth of involvement will vary from individual to individual learner identity (Lave and Wenger, 1991).

The study of a single ELC in this case allows for theory building, by enabling the initial study of former FLN learners in interaction with the ELC at community level; and by subsequently studying FLN and non-FLN learners in interaction with the ELC and the incumbent UOOs, alongside external ELC interactions, in order to understand individual learner's '*elements and relationships*' that '*influence learning*' in this environment. This approach offers the dual benefit of capturing individual learner identity and depth of involvement and also a diverse range of experiences and viewpoints. This approach seeks to maximise the value of exploratory research in the context of theory emergence by permitting the researcher to get close to the elements and relationships that influence learning in a CoP setting (Flyvberg, 2006; Haugen Gausdal, 2008; Siggelkow, 2007).

Adapting the embedded single case design outlined above, a phased approach is developed comprising the pilot study that can be validated through observation of individual interaction within a number of sub-groups (UOOs). The initial phase of the research (the pilot study- UOO1) permitted the researcher to explore the criteria associated with the primary research objective at case level. Subsequent sub-group studies (UOO2 and UOO3) permitted the refinement of the research design and

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[14] Theoretical sampling assumes that cases are chosen for theoretical, not statistical, reasons (Glaser and Strauss, 1967).

validation of emergent findings regarding individual learning (UOA) in an ELC environment. Replication logic has been incorporated into this single case design (figure 6.2) permitting the researcher to induct theory (Eisenhardt, 2007; Haugen Gausdal, 2008; Siggelkow, 2007).

Figure 6.2: Research legitimisation: The single case study
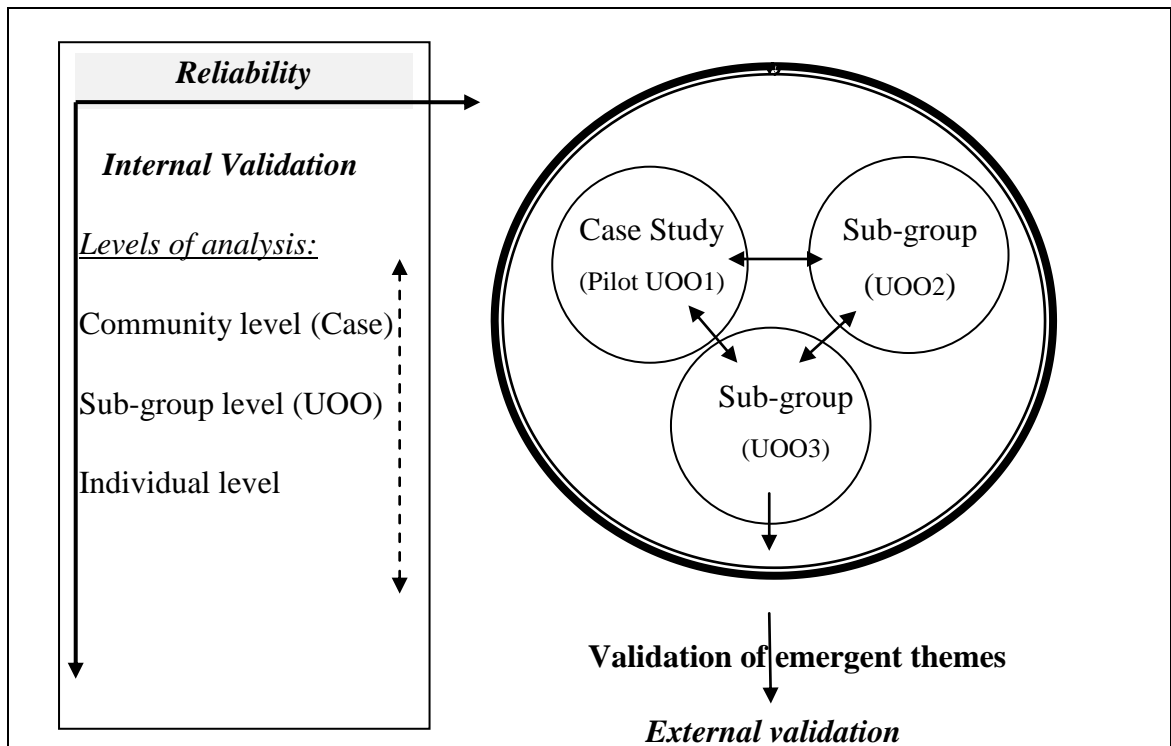
Adapted from: Yin (1994) and Eisenhardt (1989)

Research legitimacy will be explored in greater detail in section 6.8 (p. 149).

6.3.5   Case study selection process

As acknowledged by Eisenhardt and Graebner (2007) theoretical sampling of a single case is a straight forward process as the case is unusually revelatory. The case selected reflected a strong example of an ELC. Three sub-groups formed the research sample (Figure 6.2). Following an initial learning community contextual study (which formed part of the pilot study (UOO1)), the researcher conducted two further validation studies

(UOO2 – 3). The UOO were selected based on established criteria outlined below in Table 6.2.

Table 6.2: Case selection criteria

	Selection criteria
Case study	• Evolved from facilitated learning network (FLN) membership • Purpose of learning and business development • Pre-dominantly micro-firm owner-managers • Some former learning network members (FLNM) • Some other ELC members (OELCM)
Pilot sub-group	Sub-group identified fulfilling pilot study criteria: • A sub-group operating under the ELC umbrella • FLNM <u>are core</u> to the group
Validation sub-group studies	Sub-groups identified fulfilling criteria for validation cases: • A sub-group operating under the ELC umbrella • FLNM & OELCM representing different learner identities and histories of learning

The sample design was constructed to incorporate a range of ELC learners in an attempt to understand individual learning evolution within the community. Specifically the initial observations sought to establish the elements and relationships that influence individual learning development within the ELC. Random selection is not preferable or necessary in this context (Eisenhardt, 1989). The validation sub-groups (UOO2 and UOO3) sought to appreciate learning nuances at individual, sub-group and community level within this environment.

6.3.6   Case duration

The appropriate duration of the case is dictated by the aim, objectives and context of the research (Hakim, 2000). Literary indications suggest a study no less than eight months

with the final duration dependent on the nature of the study. This case study took fifteen months to complete permitting theoretical saturation (Hill and McGowan, 1999; Eisenhardt, 1989). Having established a FLN baseline, the pilot study sought to establish relevant learning criteria over an estimated eight month period. The validation sub-group studies also took eight months to complete, and were studied simultaneously. The researcher outlined and discussed case duration with participating ELC members prior to the start of the research study (see appendix B: research terms of reference).

6.3.7 Case access

Access can be problematic in small firm research (as highlighted by Down, 1999; Curran and Blackburn, 2001). The amount of data required for single case research is significant (Yin, 2003) and represents significant commitment from the researcher and participants of the study. Having established the suitability of the ELC for the proposed case study, access was negotiated through an initial meeting with participant one (P1[15]), followed by an appropriate 'cooling off' period. The case participant coding structure is outlined in Appendix F.

Following preliminary agreement to proceed, the research terms of reference (including a proposed case plan, outlined in Appendix B) and the boundaries of the research were outlined and agreed. A period of time to communicate the research request to other ELC members was allowed. To ensure collective understanding of the research, the proposed case study was discussed with ELC group members and a period of time was agreed to ensure that the group had an opportunity to consider the request and air any potential concerns regarding their involvement in the study. The researcher also clarified the

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[15] Each participant was assigned a numerical value P1-P55. See appendix F for coding structure.

boundaries of the research. The access details were formalised in the research terms of reference (see Appendix B).

6.4 Case study research design

A research design is a logical plan of action that connects the empirical data to the research questions and finally to the conclusions (Yin, 1994). The research design evolved from the initial pilot phase, where preliminary findings informed the design as the case study progressed. The author developed a research protocol (Yin, 2003) as an element of data collection preparation for each sub-study (pilot and validation studies). The protocol outlined a clear schedule of activities and timelines (see appendix C), focusing on themes to explore and subsequent data collection, management and analysis plans. Initial data from the case study was coded under the key themes from the literature review, these themes were organised in NVivo as nodes (see appendix G). Over time, as data emerged from the case, these key themes and sub-themes were refined through cycles of data analysis (see early stage node summary/theme development in appendix G). This approach facilitates the establishment of a chain of evidence (Lincoln and Guba, 1985) (see Figure 6.2, p. 123).

6.4.1 Applied research techniques

The applied research techniques utilised in this study were guided by the researcher's philosophical perspective (as outlined in section 6.2, p. 110). A variety of data collection and analysis methods have been adopted in the research design. In seeking to yield rich description (Geertz, 1973) and acknowledging that, in qualitative inquiry, no observations or interpretations are perfectly repeatable (Stake, 2008) and that '*what we see depends on our angle of repose*' (Richardson, 2000: 934); the aim in assessing the case was not merely to triangulate[16] the data but rather to crystallise it. Crystalisation[17]

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[16] Triangulation refers to determining whether convergence exists across the methods (Edmondson and McManus, 2007) and it '*assumes there is a fixed point or object that can be triangulated*' (Richardson, 2000: 934).

[17] Richardson (1994: 522) contends that crystalisation '*deconstructs the traditional idea of validity, accepting that there is no single truth ... and provides a deep, complex and thoroughly partial understanding of the topic...*'.

of descriptions and interpretations gives the single case method greater credibility as meaning is gleaned through a variety of different and complimentary lenses that provide the differing perspectives of individual ELC learners situated within the case (Richardson, 2000).

From a CoP perspective, features of practice through which learning occur include: *"...the language, tools, documents, images, symbols, well defined roles,...but it also includes all the implicit relations, tacit conventions ... embodied understandings, underlying assumptions, and shared world views.'* (Wenger, 1998: 47). Acknowledging the complexity of the social learning process, a number of studies have adopted a crystallised approach to data collection utilising longitudinal observation, in-depth interviews and internal documentary review (for example Kelliher and Reinl, 2011; Knight and Pye, 2004). Following in that tradition the researcher applied a number of these research techniques in the research design.

6.4.1.1 Longitudinal observation

It is argued that all social research is a form of participant observation (Atkinson and Hammersley, 1994). Participant observation has its roots in ethnographic studies that rely on participant observation to varying extents for the purpose of social science research (Atkinson and Hammersley, 1994). In conducting ethnographic research, researchers assume a role in the social setting that permits them to gain an insider perspective (Hakim, 2000; Yin, 2009). It emphasises the meaning that people attach to their actions (Saunders et al., 2007). Capturing the meaning and understanding of learners within the ELC is central to the overall aim of this study.

Researcher roles vary in sociological field observation, and Gold's (1958) typology is frequently used to differentiate between these roles. The typology presents four observer roles; the complete observer, observer as participant, participant as observer and

complete participant. Atkinson and Hammersley (1994) suggest that Gold's roles vary along several dimensions, and contend that the use, justification, and choice of ethnographic approach are marked by a diversity that is dependent on the theoretical or epistemological assumptions of the researcher. As such, the roles are positioned along a continuum (depicted in Table 6.3, p. 129).

Table 6.3: Role of the researcher in participant observation

Complete participant	Participant observer		Observer participant	Complete observer
True identity of the researcher is not known to those observed	The role of the researcher is explicit to all involved	**Relationship between researcher and those being studied**	Brief relationship (typically one site visit) that is often more formal	The role of the researcher is only known to a select few
The research study is not understood by those being researched	The research study has been communicated and is understood by those involved	**How much is known about the research study**	The research study has been communicated and is understood by those involved	The research study is not understood by those being researched
Role pretence is an underlying theme and the researchers true identity is not known to others	The group understand that activities undertaken are taken in pursuit of the aims of the research study	**The activities that the researcher engages in the field and resultant status given by the group**	The group understand that activities undertaken are taken in pursuit of the aims of the research study	As a result of researcher activities in the field the researcher is perceived as a member of the group
The researcher consciously adopts the role of insider	The researcher consciously adopts the role of outsider but trust builds over time	**Orientation of the researcher**	The researcher consciously adopts the role of insider	The researcher consciously adopts the role of insider

Adapted from: Gold (1958) and Atkinson and Hammersley (1994)

A distinction is drawn elsewhere in the literature between the role of participant and non-participant observer, where the latter adopts a more passive role (Yin, 2009; Zikmund, 2000). From an interpretivist perspective, both roles involve subjectivity (Walsham, 1995). Atkinson and Hammersley (1994) argue that such simplistic dichotomies imply that the researcher plays no role at all in the studied environment. Riordan (1995: 7) acknowledges that '*no one is ever really an observer of social events, but always somehow also a participant',* as the presence of the researcher influences what is observed to some degree (Jankowicz, 2000). In this context, the importance of 'active reflexivity' (whereby researchers recognise that they are part of the social events they observe and narrate) has been signalled in the literature (Atkinson and Coffey, 2001; Tedlock, 2008; Walsham, 1995).

In this research study, the researcher is external to the case community, is not an ELC member or involved in the core activities of the learning community. The role of the researcher is known by all ELC members to be explicitly for research purposes, and a number of procedures were adopted in the research protocol (see appendix B) in this regard, as advised by Hakim (2000). The influence of the researcher's presence on community interactions is acknowledged and the researcher's own perceptions and observations were documented in the reflexive diary which was maintained throughout the research process. The crystalisation of data through observation supplemented with interviews, reflective journals and an internal document review (including ELC group email correspondence) offered the researcher a level of verification for the purposes of research legitimisation.

As an approach, observation has been used extensively in learning research (Juriado and Gustafson, 2007; Knight and Pye, 2004; Lave and Wenger, 1991; Mumford, 2001; Sullivan, 2000; Toiviainen 2007) and its importance as a technique for capturing the nuances of CoP is evident in Lave and Wenger's seminal work (Lave and Wenger 1991; Wenger, 1998) and other empirical studies on CoP (Juriado and Gustafson, 2007; Thompson, 2005). Learning is developed and framed within a social context (Brown and Duguid, 1991; Lave and Wenger, 1991) and involves a great deal that is not

explicit. Observation offers the researcher the opportunity to reveal actual practice and to capture the differences between what people say they do and what they do (Bryman, 2004; Gummesson, 2007; Zikmund, 2000), allowing the researcher to '*move beyond the selective perceptions of others*' (Patton, 1990: 204). Tucker et al. (2002) believe that observational data can be used as a foundation for new descriptive and theoretical propositions about a subject, further enhancing the technique's applicability in this research.

The researcher, acting as the research instrument, observed the ELC members during a number of site visits to the case community over a fifteen month period, attending ELC meetings and other learning events. These events (for example a project or festival) represent the practice of the learning community. The events provide the context for exploring learning and competency development, as they facilitate the process of knowledge and experience sharing. Learning events may be reactive events or actively created by the community (Toiviainen, 2007). This research technique has been previously utilised in learning network research (Toiviainen, 2007), CoP research (Juriado and Gustafson, 2007; Thompson, 2005) and entrepreneurial learning research (Cope, 2003).

Planned observations outlined in the research terms of reference (appendix B) were pre-agreed with ELC participants. The researcher observed eight ELC meetings (spread throughout the fifteen month observation period) and also observed numerous informal interactions and conversations while conducting field visits over this time. Observations mainly focused on nine key participating ELC members and their interactions with other observed ELC members (Figure 6.1, p. 121). The sub-groups, acting as UOO permitted themes to be further explored and refined as the case progressed.

In each case, descriptive and reflective notes were taken on site as recommended by Creswell (1998). Participant interactions, comments and reactions were documented in

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the observation schedule (outlined in appendix C) providing rich description that is continuously interpreted against different issues and from different perspectives (Stake, 1995). As the study progressed and emergent themes were developed (Table 4.3) a more structured approach to data collection was adopted (as described in: Adler and Adler, 1994; Jones and Somekh, 2005). Pre-defined learning criteria served as a guide to capture occurrences of interest within the overarching context of the research aim and objectives, as recommended by Eisenhardt (1989). More detailed observations were written up directly following the observed event.

Adler and Adler (1994) suggest that the rigour of observation can be strengthened through other techniques that yield depth, such as the in-depth interview. Thus, themes emerging from observations were further explored during in-depth interviews and conversations.

6.4.1.2 Semi-structured interviews and informal conversations

Interviews are recommended as a research approach where it is necessary to understand the reasons for attitudes, views and decisions taken and where the nature of the questions are complex and open-ended (Saunders et al., 1997). Underlying their suitability as a data collection technique is the assumption that the perspectives of others are meaningful (Patton, 1990). Bearing this epistemological and ontological assumption in mind, in-depth interviews were deemed an appropriate strategy in the context of the overall aim of this research study.

Interviews vary in their level of structure but the overriding goal is to develop understanding (Fontana and Frey, 1994). Unstructured interviews (loosely directed by an interview guide) allowed the researcher to draw from the core themes of the research while exploring any emerging issues (Sekeran, 1992) in relation to social learning community features (Ahmad, 2005; Knight and Pye, 2004). The interview guide (see

appendix B) provided a list of themes to be explored (Saunders et al., 1997) and was adapted as the interview unfolded and as other useful sources of evidence were revealed (Yin, 1994). The guide assisted in clarifying any discrepancies between attitudes and behaviour (Hakim, 2000) and permitted critical insights to be interpreted from the eyes of the respondents (Yin, 1994).

A number of measures were adopted to build rapport and trust. Site visits provided the opportunity for initial introductions and clarifications. Issues of confidentially and methods of data collection were discussed, agreed and reiterated prior to each validation sub-group study (see terms of reference: appendix B). In the initial stages of the research, interviews were recorded and transcribed with prior consent, freeing the researcher to capture important non-verbal cues and meanings (Sekeran, 1992; Stake, 1995) underlying the interview dialogue. After a number of initial semi-structured interviews, the author realised that recording was not an optimal approach, just as Thompson (2005) found, many impromptu opportunities to chat informally to ELC members arose over breakfast at respondents' businesses or during a walk around the village. To overcome issues of poor recall, the researcher took detailed notes (as recommended by: Fontana and Frey, 1994; Loftland, 1971) directly after each conversation. These notes comprising ELC discussion points and a further layer of researcher reflections were documented in the research diary (as recommended by Jankowicz, 2000). Any contradictions in the data were explored through follow-up interviews and focus groups. In an effort to avoid data saturation, sufficient time was scheduled between observations and interviews as recommended by Easterby-Smith et al. (1994).

During each site visit the author documented informal conversations with, and between, case study participants and other ELC members. In one-on-one conversations, techniques of elicitation and steering guided the conversation around themes in the research, paying attention to non-verbal signals while allowing the respondent to tell

his/her story. Detailed notes jotted down after conversations, provided a record of developments and important points that required further exploration.

Observed interactions between ELC members provided richer interpretation (Janesick, 2000; Newby et al., 2003; Sarantakos, 1998) and captured group influences as the group perspective unfolded (Hakim, 2000). These were pursued during individual interviews and informal conversations, allowing the researcher to capture individual motivations and perspectives and corroborate evidence. Finally, emergent themes formed the basis for future discussion points where any limitations the respondents might have placed around their views were explored (Somekh and Lewin, 2005). This process was supported by an interview guide (Sarantakos, 1998).

6.4.1.3 Key informant technique

This technique is a form of semi-structured interview where respondents are chosen to participate on the basis of specialised knowledge (Adelard Tremblay, 1957; Jankowicz, 2000). The key informant technique was utilised mostly in the pilot phase of this study. The key informant (P1) was selected on the basis of her role and depth of involvement in the ELC. In the pilot study phase of the case research, questions were designed to establish (from the key informants perspective):

1. A definition of the ELC;
2. The purpose and ethos of the learning community;
3. ELC history and learning development;
4. Learner roles and identities within the community;
5. The boundaries of the community.

Over time, as the researcher became more familiar with the ELC environment, points of discrepancy were explored further in an attempt to address issues of internal consistency and reliability (crystallising the data). The researcher sought to reveal underlying

motivations and differences of opinion, in an attempt to understand their relationship to different learner identities and the wider social learning process. The key informant was less involved as the researcher's knowledge increased, however, the researcher returned to P1 at key stages during the validation studies to capitalise on the insights of a 'natural observer' situated at the core of the learning community.

6.4.1.4 Reflective diary

The diary has a long and established use in social sciences. According to Stake (2008: 128) qualitative case work is essentially reflective and characterised by '*extended time on site, personally in contact with the activities and operations of the case, reflecting, and revising descriptions and meanings of what is going on*'.

The reflective diary has been advocated as a rigorous documentary tool (Glaser and Strauss, 1967; Janesick, 2000; Stake, 1995). However Cunliffe (2004) points out that journal writing is about thinking about oneself from a subjective perspective. As such the diary can be a means of learning in itself by facilitating the development of a critically reflexive perspective, where the researcher questions his/her actions, develops knowledge about those actions and in doing so exposes assumptions that influence those actions, benefits also alluded to by others in a learning research context (Kelliher and Henderson, 2006). The utility of the diary extends to the exploration of motives, perspectives and insights (Easterby–Smith et al., 1998) and it also provides a historical record that tracks the evolution of the research study, and the researcher's role and perspective of the study (Janesick, 2000). The diary was completed following each site visit and throughout the research process. It captured a simple record of events, permitting the author to record the activities of members and their frequency.

6.4.1.5 ELC communications

The researcher negotiated full access to the ELC's group email communications from 2007- 2011 (see appendix B: Research terms of reference). Detailed meeting minutes were also included in these communications and offered valuable additional insights into practice and learning in the ELC.

The minutes and email documentation essentially represented the reification (see glossary) of learning and practice in the community (Lave and Wenger, 1991) and provided another source of evidence in this context (Easterby-Smith at al., 2002). The meeting minutes provided detailed summaries of ELC meeting interactions, agenda items, outcomes and responsibilities. This detail provided a level of comfort, as it allowed the researcher greater time to observe important learner interactions and developments. As the emails/meeting minutes occurred in 'real-time' and in naturalistic context, these documents of communication are closer to speech and required contextualised interpretation (Hodder, 1994). ELC email communications, as written word, were therefore viewed as reflecting the social world of respondents (Mason, 2002).

ELC emails were analysed over the duration of the case study (fifteen months in total) in real time. This research technique was particularly valuable on two levels; firstly as a key method of communication, the evolution of practice and learning often developed through email communication that the researcher would have missed had email access not been accommodated, secondly this technique permitted discrepancies between reported activity and actual activity (at ELC meetings) to be captured. Emergent themes were supported by observations and formal and informal interviews, thereby enabling a crystallised view of the ELC. These records, coupled with a range of other data collection methods provided an in-depth holistic account of ELC interactions (Hakim, 2000).

Emails and meeting minutes as documented objects of communication are created in a particular context, directed by an individual to another/other individuals for a specific purpose with intended and unintended consequences (Mason, 2002). In analysing the emails, the relationship between the 'email author' (their role in the ELC and their learning identity) and the content of the communication was considered (Atkinson and Coffey, 2011). Manifest content (repetition and emphasis) and latent content (underlying meaning) were taken cognisance of (Sarantakos, 1998) and the integrity of the emails was kept intact. For example, the 'email author's' own emphasis (use of capitalisation, bolding text and font colour) was preserved. This technique was considered valuable in the context of exploring underlying themes under investigation. It offered the advantage of being an additional unobtrusive approach in this research study. It may be used to cross-validate other measures (Robson, 2002; Sarantakos, 2005) and in this context it provides a connection between '*the word and the world*' (Prior, 2011: 96) where the authors of the email communication could 'speak back' (Hodder, 1994) in relation to the content during follow-up interviews and informal conversations. In analysis, '*the process of reading, understanding, translating, and interpreting documents, selecting them, comparing them and so on, adds a further dimension of construction as well as reflexivity*' (Mason, 2002: 110).

6.4.1.6 Telephone interviews

Telephone interviewing has the same characteristics of standard interviewing and affects the research process (Sarantakos, 2005). Two clarification interviews were conducted by telephone in the latter stages of the case study when attempts to arrange face-to-face interviews were unsuccessful, due to the time of year (the busy tourism season was beginning) and the fact that the participants were micro-firm owner/managers that could not take time out from the business. As the researcher had already established rapport with the respondents, many of the limitations of telephone interviews (as outlined by Sarantakos, 1998 and Sekeran, 1992) did not occur. Specifically, it was deemed to be a suitable approach as the clarifications were brief and had been discussed beforehand with respondents face-to-face.

6.4.2 Complementary research techniques

In order to provide a more rounded account of individual learning in the ELC, the key data collection techniques of observation, in–depth interviews and analysis of ELC communications were enhanced through a number of complementary research techniques that sought to strengthen the validity of the research findings (Remenyi, 1998) and crystalise the data (Richardson, 1994).

6.4.2.1 Internal documentary sources

The researcher had access to a variety of records that provided a historical background of ELC activities, these included funding applications, ELC activity templates, brochures, media coverage of ELC events, past meeting minutes (dating from December 2007 – April, 2011) and correspondence between the ELC chairperson and a range of other external stakeholders. These documents were provided by P1 and explained in context, from her perspective. These records provided an important snapshot of the ELC's activity since its establishment in 2007.

6.4.2.2 Tourism community contextual analysis

The importance of context in social learning research has been established (Brown and Duguid, 1991; Knight and Pye, 2004; Lave and Wenger, 1991). Key influences emerging from the tourism industry review in chapter five (p. 90) were explored further in the case study and incorporated in the learning community model (Figure 7.4, p. 241) in an effort to illustrate a comprehensive visualisation of learning in the ELC environment. Key micro-firm and tourism strategies and policy documents were reviewed in this study. Attendance and dissemination of research at a number of relevant conferences and seminars also provided valuable feedback and an additional frame of reference for this research.

6.4.3 Applied learning measurement technique

Learning measurement techniques reflect the learning perspective and epistemological stance of researchers. As stated previously, this research draws primarily from the social learning perspective. From this perspective, individual learner development and autonomy occur through a social learning process. Proponents of this perspective argue that the learning process is recognisable through development cycles where newcomers move from legitimate peripheral participation to full participation within the community (Wenger, 1998). This move is visible and observable through a number of features, including but not limited to, depth of learner involvement and the demonstration of higher level learning behaviours.

Wing Yan Man (2007) adopts a competence based perspective to learning measurement, suggesting that learning is as '*an integrated yet multidimensional construct involving measurable and observable variables such as knowledge or experience, learning skills and learning-related attributes as inputs, learning behaviours as process, learning-related attributes and other constituent elements for other entrepreneurial competencies as outcomes...*' (Wing Yan Man, 2007: 196). This perspective and approach to learning measurement is congruent with the CoP perspective (Lave and Wenger, 1991) where learning development is discernible through the learner's development to full participation.

The underlying assumption is that learning exists at an individual level (the owner/ manager) in this research. While the focus of this study was the individual, the importance of capturing learner interaction and interdependency in the ELC was taken cognisance of through techniques that seek to capture the nuances of the social learning process in the ELC. Contextual factors were also considered in terms of their influence in the facilitation or inhibition of learning (Wing Yan Man, 2007). It was not the intention of this research to measure the quality of learning but to understand the ELC

learning dynamic. Pursuit of such understanding has informed the observation guide (see appendix C) utilised in this study.

6.4.3.1 Cross sub-unit comparison

Units of observation (UOO) permitted differences and similarities from one sub-group to another to be captured. Data collected from individuals in each sub-unit was organised around the emergent themes. This approach permits sub-cultures, and similarities and differences between the sub-units, to be unveiled until saturation is achieved (Eisenhardt, 1989). Organising the data in this manner permitted the researcher to map conceptual themes that were common and consistent (Knight and Pye, 2004) in the sub-groups to inform the learning community model.

The cross case analysis sought to counteract the potential tendency to leap to conclusions (Kahneman and Tversky, 1973). The goal in this process was to refine the ELC model after the pilot study. The researcher sought theoretical generalisation and established a chain of evidence. The pilot study and validation case protocols (in appendices C and D) outline how the researcher came to his/her conclusions or recommendations (Miles, 1979).

6.5   Research value

In pursuit of the research objectives of this study the following activities were undertaken:

- Literature review

A comprehensive literature review resulted in key themes that were further explored in the pilot case and informed the learning community model.

- Pilot case

Case studies are of value in refining theory and suggesting avenues for further investigation. As such, the purpose of the pilot case was to explore themes to guide future observations and to assist in the development of relevant case issues that could aid in the development of more relevant case issues (Remenyi et al., 1998).

- Learning community model

The literature review provided a number of key research themes that influence learning in ELCs to be explored in the pilot study (Table 4.3, p. 85).

Table 4.3: Key research themes

Theme	ELC environment
Learning membership & identity	Influenced by: • Depth of involvement & membership criteria; • Trust & histories of learning; • Lifestyle & business motivation; • Power structures; A range of identities contribute to practice; Identity is shaped between learning communities.

Theme	ELC environment
Learning broker	Role is to promote autonomy; encourage reflection & anchor learning in the practice of the ELC; Demonstrates visible learning competencies; Can stimulate buy-in & learning but success requires legitimacy; Central in maintaining an action/reflection balance.
Learning support	Different levels of support are likely to be required for members at different phases & depth of involvement.
Learning strategies	Learning emphasis must be maintained & managed, requiring a level of competency; Cooperative strategies are learned in action as relationships develop over time.
Learning relationships	Influenced by seeding structures & shared histories of learning; Differences in interpretation require negotiation; Process is positive unless it disrupts engagement; Requires a delicate balance between interdependency & autonomy; Involves local manoeuvring with external environment; Multiplicity of perspectives equate to differing expectations; Lack of leadership & guiding structure at early stages could impact the psychological contract.
Learning resources & symbols	Embody shared learning & knowledge; Contribute to shared meaning over time; Value lies in the way that the creators interact.
Learning development	Learning develops through engagement in practice; Danger that action bias may push the learning agenda to the side, success is dependent on learning competence; Levels of learning competence are evident in demonstration of higher level learning behaviours.

These themes were incorporated into a conceptual model of ELC learning (Figure 4.2, p. 86). This process assists in the pursuit of the research objectives that seek to explore and map the elements and relationships that influence learning in ELCs and to refine the learning community model based on the findings.

6.5.1 Validation cases

Multiple cases offer a richer understanding of processes and outcomes in context (Chell, 1998; Miles and Huberman, 1994). Similarities and differences between sub-groups are revealed until saturation is achieved (Eisenhardt, 1989). The researcher can map common and consistent themes (Knight and Pye, 2004) in the sub-groups to inform the learning community model. Replication in the validation cases helps to legitimise the findings and refine the learning community model (research objective four).

6.6 Data management

Data management incorporates data collection, storage and retrieval (Miles and Huberman, 1994). Analysing the data entailed an iterative process of data collection and analysis (Eisenhardt, 1989).

The researcher spent two days per visit at the research site for the pilot study, attending and observing an ELC meeting and a sub-committee meeting on day one and taking detailed field notes of activities, interactions and development. The observation schedule can be viewed in appendix C. The researcher's reactions and learning points were separately emphasised, as recommended by Eisenhardt (1989). The observations and perspectives of the researcher were captured in a reflective log, permitting the emergence of new lines of inquiry from the data. These were explored on day two through in-depth interviews and informal conversations with the relevant sub-group and participating ELC members. Initial interviews were recorded with prior consent and transcribed verbatim. Where recording was not appropriate or preferable, detailed interview notes were taken and transferred into an NVivo software package. This approach provided a record of the interviews and of the reflections of the researcher that could be re-visited. The sheer volume of the data can be challenging (Florén, 2003) and in this context use of NVivo software made the task more manageable.

Data collection for the validation studies followed the same format outlined above, with validation case 2 commencing one month after validation case 1. Subsequent site visits were conducted based on a planned three month interval schedule, permitting the researcher to document the evolution of the learning community over a fifteen month period.

At stages throughout the research data collection the interviews took different lines of inquiry that revealed rich insights and differences between individual leaner role and identity. Therefore where appropriate the researcher departed from the interview guide in a process of 'controlled opportunism' (as referred to by Eisenhardt, 1989). The researcher also departed from the planned schedule when opportunities arose to sit in on additional meetings or informal conversations.

The continuous interpreting of case study data requires the case researcher to be ever reflective (Stake, 1994). After writing up preliminary observations; categories, themes and patterns of data were extracted through cycles of comparative analysis that reduced the data into meaningful statements and tabulations, while reassessing constructs and developing a working model (Stake, 1994; Eisenhardt, 1989). Significance was verified through crystalisation of field notes, interview transcripts, email communication and the author's reflective diary. This process also served to decrease misrepresentation.

The benefits of using software packages in data analysis have been pointed out (Creswell, 2007; Miles and Huberman, 1994; Ritchie and Lewis, 2003; Sarantakos, 2005) - these include ease of coding, searching, storing and linking data. The NVivo software package proved valuable in terms of sorting, reducing and managing the data collected while preserving the contextual richness of the data, an important consideration according to Sarantakos (2005). Assigning codes to themes enhanced the consistency of the data.

6.6.1   Crystalisation

In pursuit of reliable data, the author took the advice of Richardson (2000) and sought to crystalise descriptions and interpretations to give the single case method greater credibility. By gathering the data through a variety of different and complimentary lenses, different perspectives of individual ELC learners situated within the case are

gained. As Stake (2005: 454) explains, the researcher '*is interested in diversity of perception*' and the '*multiple realities within which people live*'. Other studies have used this approach to data collection utilising longitudinal observation coupled with in-depth interviews and internal documentary review (Kelliher and Reinl, 2011; Knight and Pye, 2004). Following in that tradition, the researcher applied a number of these research techniques in the research design (see appendix C).

6.7   Data analysis and interpretation

Analysis is a circular process of describing, connecting and classifying data (Dey, 1993). According to Miles and Huberman (1994: 9) there are a classic set of analytical moves:

- Assigning codes to the data;
- Adding comments and reflections (memos);
- Identifying patterns, themes, differences and similarities between sub-groups and refining them further back in the field;
- Gradually elaborating a set of generalisations and linking these to a body of knowledge to form constructs or theories.

Similarly Creswell (2007) suggests a number of steps in case study data analysis (Table 6.4 below).

Table 6.4: Case study data analysis and approaches

Criteria	Action taken
Data managing	Create & organise files for data
Reading, memoing	Read text, margin notes, form initial codes
Describing	Describe the case & its context
Classifying	Categorise themes or patterns
Interpreting	Direct interpretation; Naturalistic generalisations
Representing/visualising	Present in-depth picture

Source: Creswell, 2007: 156

Considering the researcher's interpretive stance the aim of this research is to provide a trustworthy account (Lincoln and Guba, 1985) of the phenomenon and to describe events in context and in a holistic manner. However, the challenge is to reduce the data into significant themes that eventually inform the model so that the researcher can communicate '*the essence of what the data reveal*' (Patton, 1990: 372). In this context Robson (2002) recommends the use of a software package to manage large volumes of data (for example NVivo used in this research study). The researcher organised files for

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data storage and management in NVivo. Reflections on using NVivo in this research project are presented in appendix H. Data was collected and analysed from the field notes, raw notes were converted into usable write-ups (Miles, 1979) using memoing techniques in NVivo (Saldana, 2009). Recording and transcription provided 'earthy data' (Miles, 1979). The author coded and categorised the data under relevant themes.

Finally, the research and objectives of this study dictated an iterative process of data collection and analysis (as recommended by Eisenhardt, 1989; Walsham, 2002). Cycles of additional data collection and analysis were undertaken until saturation was achieved (Eisenhardt, 1989; Sarantakos, 2005). Initial facts were explored in greater depth in subsequent site visits and during the validation cases as '*categories of behaviour emerge*' (Chell, 1998: 60). Themes are then used to provide common interpretations. The identification of key themes at this point allows the researcher to relate data to these themes and as the analysis progresses the researcher identified relationships in the data verified through field notes.

According to Yin (1994) the research report can be linear-analytic, comparative, chronological or theory-inducing dependent on the research philosophy. As learning has is a dynamic process that has emergent properties (Florén and Tell, 2004; Pettigrew, 1990), a chronological record over a prolonged period of time offered greater insight into learning in an evolving learning community context. Themes identified early in the pilot case (as informed by the literature review) were incorporated into the conceptual ELC model to focus the investigation and promote the move towards theory. Subsequent research permitted the refinement of the model in pursuit of theory.

6.8   Research legitimisation

Interpretive research provides rich description (Geertz, 1973) however it is often criticised in terms of reliability, validity and generalisability; and alternative quality considerations include trustworthiness and authenticity.

6.8.1   Reliability

Reliability refers to the extent to which the procedures and operations of a research study could be carried out by others and produce the same results. Yin (2009) advises that incorporating a case study protocol may increase the reliability of the research. The protocol contains the research instrument and the procedures and rules that guide the process. The case study protocol is outlined in appendix B. It encompasses the protocol purpose, case selection, duration and access, data collection methods and finally the case report. Qualitative research can be strengthened by combining multiple techniques including observation, interviews and documentary sources (Atkinson and Hammersley, 1994; Eisenhardt, 1989) as was the case in this study.

6.8.2   Validity

There are three measures of validity in case study research, these are: construct validity, internal validity and external validity (Yin, 2009). Construct validity involves identifying the correct operational measures for the concepts being studied and Yin (2009) cautions against the use of subjective judgements in the collection of case data and recommends a number of measures that can be taken to increase validity in this context. Internal validity is established where several pieces of case information point to a theoretical proposition (Stake, 1995) or empirical assertion (Janesick, 2000). As recommended, multiple sources of evidence were utilised in this study (Eisenhardt, 1989; Hammersley and Atkinson, 1983) in an effort to establish a chain of evidence that would enable an external observer to move through the case study process and cross

reference the methodological pathway, that ultimately leads to the research findings (Yin, 2009). Inferences drawn from sub-group A were compared to inferences collected in the validation sub-groups in a process of respondent crystalisation (Atkinson and Hammersley, 1994).

External validity involves defining the domain to which a study's findings can be generalised (Yin, 2009). In this case, while sub-group comparisons aid external validation, focusing on a sole sector (for example the tourism sector in this research study) may restrict this form of validity; a point duly noted in this study.

6.8.3   Generalisability

From a phenomenological viewpoint generalisability focuses on the likelihood that ideas and theories generated in one setting can be applied to other settings (Easterby-Smith, et al., 1994). In other words that research can locate the general in the specific (Hill and McGowan, 1999). This is an inherent tension in qualitative case research. Yin (2009: 21) contends that case studies are '*generalisable to theoretical propositions*' pointing out a useful distinction between the intentions of survey research that intend to statistically generalise; and case research that intends to draw analytical generalisations from a case. From Stake's (2000) perspective, the case is a powerful method of 'naturalistic generalisation', as it capitalises on the importance of experiential understanding. As such, it has its own '*arena of applicability*' (Lincoln and Guba, 2000: 38) wherein similar objects and issues can be recognised by others.

Walsham (1995) outlines four distinct generalisations that can be made from interpretive cases, these are: the development of concepts, the generation of theory, the drawing of specific implications and the contribution of rich insights.

The process of purposive sampling is often critiqued for being chosen on the basis of convenience and ease of accessibility. The sample selection for this research was based on the likelihood that a particular population could illuminate the phenomenon that the researcher was interested in studying (Denzin and Lincoln, 1994; Silverman, 2006). The prime selection criteria were balance, variety, and the opportunity to learn as advised by Stake (1994). Knowledgeable informants with diverse perspectives provided critical insights and limited retrospective sense making (Eisenhardt and Graebner, 2007; Yin, 1994).

6.9   Research considerations

Throughout this study, access to and treatment of, the research respondents was considered. Specifically, issues of confidentially in relation to the management, storage and dissemination of data collected were considered, and actions taken to protect this domain (Saunders et al., 2007; Silverman, 2006). Not adding any specific value to the research, the case community and location were kept anonymous (Jankowicz, 2005), as were the learner identities of case participants.

The researcher was initially introduced to the group by P1[18], and provided an outline of the research study to the group. Balance between participation and observation can be difficult in research of this nature. In this context, the researcher adopted the role of participant observer, making her role explicit and building trust over time (Table 6.3, p. 129). The research terms of reference were agreed (see appendix B) and reiterated prior to each sub-group observation and interview cycle.

Issues of privacy and confidentiality were addressed in the initial meetings with P1, and reiterated throughout the case research with other participants. The duration of the case and the likely depth of involvement of the researcher was discussed with case participants and outlined in the research terms of reference prior to commencing each stage of the research. Potential benefits of the research for the case community were also discussed. The research terms of reference also covered confidentiality and termination procedures.

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[18] P1: participant 1. See appendix F for participant coding approach.

In observing the case community over a fifteen month duration, the author acknowledges that her presence had an effect on the behaviours of those being observed (Atkinson and Hammersley, 1994). In an attempt to diminish the effect of the author's presence, data was acquired from a variety of sources, using a number of research techniques, over a lengthy period of time.

6.9.1 Representation

Acknowledging that there is no value-free or bias-free design (Janesick, 2000) in qualitative research and that it is predisposed to factors of perception, preconceptions and person values (Yin, 1994), the researcher sought to deal with these issues through a robust research design that incorporated the crystalisation (Richardson, 1994) of emergent findings. Cognisant of these issues the author maintained a reflective diary throughout the research process (as recommended by: Cunliffe, 2004; Glaser and Strauss, 1967; Janesick, 2000; Stake, 1995).

During an interpretive longitudinal case study the researcher is likely to interact with the case participants at a social level in addition to a professional level. Once the researcher is socialised into the group, reporting on participants can be a difficult task and the researcher must engage in a process of questioning in order to provide an impartial account. Any preconceptions that the researcher may have had were explored in the reflective diary. Here, the researcher sought to identify and consider influences the ELC members had on the researcher and that the researcher may have had on them.

6.10 Summary

This chapter outlined the research framework of this study. Having outlined the rationale for adopting the single case approach and presenting the adapted case design, the strengths of the research methods applied in this case study were presented. Finally, relevant issues of research legitimisation were reflected upon.

Taking cognisance of insights from the literature, several features of the ELC dictated a phenomenological, subjectivist approach to research design. These included the need for an approach that facilitated closeness, captured a range of experiences and attitudes and facilitated the observation social learning interactions in the ELC. In response to these requirements, the embedded single case design (Figure 6.2, p. 123) was adapted in line with the overall aim of the research: to explore the elements and relationships that influence learning in an ELC. In the adapted case design, sub-units equate to units of observation (UOO) rather than units of analysis (UOA). These UOO represented different levels of analysis (LOA). A phased approach was developed that would permit the researcher to explore the criteria associated with the primary research objective at case level in the initial phase of the research (the pilot study- UOO1), while subsequent sub-group studies (UOO2 and UOO3) of FLN and non-FLN learners in interaction with the ELC and the incumbent UOOs, alongside external ELC interactions permitted the refinement of the research design and the validation of emergent findings. Replication logic was incorporated into this single case design (figure 6.2) permitting the researcher to induct theory. The research protocols developed for each sub-study (appendix C and D) facilitated the establishment of a chain of evidence.

The guiding conceptual framework presented in chapter four (p. 86) suggested that learner role and identity and depth of involvement would vary from individual to individual. In this context, the adapted embedded single case design offered the benefit

of capturing learning development as learner behaviours emerged over time. As such, this design would be particularly useful for other learning community evolution studies.

The observation of ELC events was revelatory in the context of observing learning and competency development. The analysis of ELC emails in real time proved valuable on a number of levels; firstly as a key method of communication, the evolution of practice and learning often developed through email communication that the researcher would have missed had email access not been accommodated, secondly this technique permitted discrepancies between reported activity and actual activity to be captured. Finally the detail in the email communications provided a level of comfort, as they allowed the researcher extended time to observe important learner interactions and developments.

Where appropriate the researcher departed from the interview guide and the planned schedule of research activities in a process of 'controlled opportunism' that reflected the opportunistic manner that individual ELC members interact and learn in practice. These diversions often revealed rich data that would have been otherwise missed. As such, the author recommends a degree of flexibility is built in to the research design of micro-firm learning community studies.

An iterative process of data collection and analysis was undertaken until saturation was achieved. The researcher mapped conceptual themes that were common and consistent in the sub-groups to inform the learning community model. As the study progressed, emergent themes developed through cycles of comparative analysis that reduced the data into meaningful statements. Tabulations and constructs were reassessed and the working model was refined and developed. Initial facts were explored in greater depth in subsequent site visits and during the validation cases as categories of behaviour emerged. This approach also permitted sub-cultures, and similarities and differences between the sub-units to be unveiled. Finally, replication in the validation cases assisted

in legitimising the findings and refining the learning community model (research objective four).

Chapter Seven

Discussion and analysis

7.0 Introduction

This chapter profiles the case community investigated in this research. The elements and relationships that influence individual learning in ELCs, after facilitated supports end are discussed. In answering the research question, individual, group and community level interactions are considered. The identification of themes at an early stage in the research allowed the researcher to relate the case data to those themes (Table 4.3, p. 85) and these were further explored in the pilot and validation groups. This process was further supported by the model of ELC learning, conceptualised and introduced in chapter four (p. 63).

This chapter outlines the findings from this research study and presents the elements and relationships that influence individual learning in the ELC under each research theme. Prior to presenting the research findings, a profile of the case community provides background information about the ELC site. The ELC strategy, structure and the individual characteristics of members are outlined. Descriptions of the ELC's communication and knowledge structures are also provided. Finally external relationships and their influence on learning in the ELC are discussed.

7.1 Case profile

The research site is an ELC, situated on the South West coast of Ireland, roughly mid-way between two busy tourist destinations. The South West differs from a regional perspective, being heavily reliant on tourism due to a lack of industrial activity. The Cork/Kerry area, as Ireland's top tourism region, attracts a balanced mix of domestic and overseas visitors and has a well-established tourism industry and tradition of hospitality. The ELC location is slightly off the main tourist trail, and as such it has retained a village atmosphere. The ELC relies heavily on tourism. The population booms in summer months as the ELC location attracts many domestic and foreign visitors. Water-based activities like sailing, angling, diving, and whale watching draw many visitors to the ELC location and the surrounding Isles. In addition, the village has spectacular scenery.

There are a number of restaurants, bars and two hotels operating in the ELC location. There are many accommodation providers and these are pre-dominantly guesthouse and bed and breakfast owners. Another medium sized hotel had operated in the centre of the village but is now closed due to the economic crisis. Many holiday houses were built during the economic boom as a result of government tax incentives at the time and there is currently an over capacity of such accommodation.

The ELC location has a population of approximately 400, while the ELC itself comprises over 100 businesses. Cork regional airport is nearby (approximately 100km) and a regular ferry service operates to Swansea. Being the main ferry port, a number of local ferries also service several nearby islands. The vast majority of ELC businesses operate in close proximity within the ELC destination; there are a number of members from the neighbouring towns, villages and islands. These businesses operate within a one kilometre radius of one another.

A number of key features of the case site (tabulated in Table 7.1 below) are discussed next.

Table 7.1: ELC case profile

Key criteria	ELC
Catalyst for formation	Awareness & vision for the potential of collaborative learning & development through FLN participation
Motivation	Business development & learning opportunities
Purpose/aim	Leverage the resources of the collective in pursuit of learning & business development opportunities
Learning structure	Self governed & requires negotiation
Membership & identity	ELC comprises numerous individuals representing a multiplicity of business interests

External relationships influence learning |
| Psychological contract/ expected outcomes | Tacit expectations including learning & business development for any commitment given |

7.1.1 ELC structure and leadership

The ELC cooperative comprises 55 small/micro business owner/managers operating in the tourism sector. The vast majority of the businesses are micro-firms and fulfil the definition outlined in chapter two (section 2.2, p. 16). Most businesses are well established with a minority of new business start-ups. Over the duration of the case study, four new members joined the group (none of these formed part of the sample). All of the participants are private sector owner/managers of small and micro-businesses. All of those participating in the research and meeting the criteria outlined above have been in business for five years or more. All of the participants fit the age profile of 40-60+ years old.

When the case study commenced a key manager/leader held the role of chairperson (P1) and also acted in a co-ordination and learning broker capacity. In September 2010, P1 resigned as chairperson and the emergent ELC structure comprised a core management team and several sub-committees with responsibility for the main ELC activities which

are: website development and maintenance, marketing and festival planning and management.

7.1.2   ELC communication

Members hold regular ELC meetings in the off-peak tourism months (September to March) these are typically held once a month. Here, sub-committee members report back at community level on their interim activities. Regular sub-committee meetings are also held and are less formal. Detailed meeting minutes are distributed to all members via email after each ELC meeting, and at regular intervals as developments and opportunities arise. Active members communicate with others via community wide email on a frequent basis and this is the primary means of community level communication.

7.1.3   External relationships

ELC members have built relationships with a number of local and national development/support organisations including LEADER (see glossary) and Fáilte Ireland. Several members of the group are affiliated with a number of different tourism and business networks and groups. Tourism development strategies (previously outlined in chapter five, p. 90) influence ELC practice. FLN membership (specifically the Tourism Learning Networks initiative, see appendix A for details) was the catalyst for the ELC's formation; other strategies have been less positive according to ELC members.

The ELC maintains a close working relationship with another local tourism community group (group B) also operating in the ELC location. Some ELC members are also members of group B and the ELC location website is co-owned by both groups. ELC members engage in a process of local manoeuvring with many individuals (internal and external to the learning community) that add value to ELC activities.

Collectively, the group comprise individual members with a range of specialist skills (for example, website developers, journalists, artists, photographers, crafts people and historians). A plurality of values and personal interests, mirror a spectrum of lifestyle motivations in the ELC.

7.2   Key research themes

Having provided the case profile, the findings that follow will be presented under the research themes identified in the literature (Table 4.3, p. 85) and repeated here for clarity. These themes were refined as case insights emerged from cycles of data analysis. Table 7.8 (p. 236) outlines the development of the themes as they relate to the primary research findings.

Table 4.3: Key literature research themes

Theme	ELC environment
Learning membership & identity	Influenced by: • Depth of involvement & membership criteria; • Trust & histories of learning; • Lifestyle & business motivation; • Power structures; A range of identities contribute to practice; Identity is shaped between learning communities.
Learning broker	Role is to promote autonomy; encourage reflection & anchor learning in the practice of the ELC; Demonstrates visible learning competencies; Can stimulate buy-in & learning but success requires legitimacy; Central in maintaining an action/reflection balance.
Learning support	Different levels of support are likely to be required for members at different phases & depth of involvement.
Learning strategies	Learning emphasis must be maintained & managed, requiring a level of competency; Cooperative strategies are learned in action as relationships develop over time.
Learning relationships	Influenced by seeding structures & shared histories of learning; Differences in interpretation require negotiation; Process is positive unless it disrupts engagement; Requires a delicate balance between interdependency & autonomy; Involves local manoeuvring with external environment; Multiplicity of perspectives equate to differing expectations; Lack of leadership & guiding structure at early stages could impact the psychological contract.

Learning resources & symbols	Embody shared learning & knowledge; Contribute to shared meaning over time; Value lies in the way that the creators interact.
Learning development	Learning develops through engagement in practice; Danger that action bias may push the learning agenda to the side, success is dependent on learning competence; Levels of learning competence are evident in demonstration of higher level learning behaviours.

Theme exploration begins with the individual's depth of involvement in the ELC before consideration is given to the remaining themes presented above.

7.3   Depth of Involvement

In the ELC, depth of involvement ranges from shallow, where members demonstrate little or no level of participation[19], to deep where members actively engage in practice and the negotiation of meaning (NOM).

Table 7.2: Depth of Involvement

Criteria	Influence	Shallow	Deep
Motivation	Lifestyle factors influence participation in aspects of practice, can lead to perceived inequities in effort & commitment	Members hardly participate in ELC practice. Observed signals of non-participation include, absence at meetings, no engagement in dialogue	Participate across the spectrum of practice
Negotiation of meaning **(NOM)**	NOM holds community together	Reluctance to get involved when things are running smoothly; Difficult to get involved where members are not part of practice in any real sense	Frequently engage with the NOM
Level of skill and ability	Influences nature rather than depth of involvement	Reported skill gaps equate to excuse for non-participation	Over-burdening active members can drive practice & identity to sub-group level and can cause disengagement & 'burnout' over time
Sense of belonging	Sense of belonging is required to achieve deeper levels of learning	Activity does not necessarily equate to Depth of Involvement	Requires establishment of shared meaning and mutual understanding

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[19] Participation means joining with others in activities and it also implies an act of sharing something in common with others.

7.3.1.1 Motivation for involvement

ELC members acknowledged that individual motivations for learning influence the depth and nature of involvement in the ELC: *"I think that you'll find that a lot of people are coming at this from quite different aspects, I mean it's all sort of tourism... some people have very healthy businesses that they are trying to expand, and for some people it's just sort of very much a part-time thing ...there are people who are dead against doing anything that might increase* [business/visitors to the area]*... they are certainly cautious ... you have to deal with that too"* (P9). This mirrors previous findings in the small tourism context (Ateljevic and Doorne, 2000; Getz and Carlsen, 2005; Morrison, 1996; Reijonen and Komppula, 2007; Thomas and Thomas, 2006).

Many owner/managers in the learning community rely on the success of other local tourism businesses: *"I want my business to be successful but I really want the village to be a success, because, you know it's a very small village in the winter and there's not many of us, and without people maintaining their businesses there's less and less for the public to come and see"* (P5). Others are motivated to get involved from a "*community spirit*" (P9) aspect.

A range of lifestyle factors influence motivations for tourism business ownership and development (as cited by: Ateljevic and Doorne, 2000; Getz and Carlsen, 2005; Thomas and Thomas, 2006; Reijonen and Komppula, 2007) and these also influence depth of involvement in the ELC. Some members moved to the ELC location for '*a quiet life*' (P4) while others are trying to '*drum up additional business*' and have concerns about staying afloat: *"I'm different in that my business is on the Island, it's been very quiet and the lease is up* [on the business] *soon, I'm unsure what will happen with the business going forward"* (P6). Others *"didn't run up any debts in the boom"* leaving them in a '*stable financial position*' and as such they are "*not as dependent on being full all year round as others are"* (P3).

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Influenced by these motivations, individuals align themselves to certain aspects of practice (as others found: Dewhurst et al., 2007; Noel and Latham, 2006). They volunteer to work on particular ELC sub-committees, while they distance themselves from other aspects of practice: *"I have nothing to do with the festivals"* (P10). Some members actively engage in the organisation and planning of ELC events (festivals), expressing the opinion that *"anything that brings people into the community is a good thing"* (P3). They man stalls at the heritage festival, welcome people to the play at the community centre and carry out the health and safety requirements for the walking festival. Others members question the value of such activity, as P9 explained: *"there was some criticism of the heritage festival ... it's all well saying that it would pull people in if you had it in February, but I'm not sure that it would work at all because there just wouldn't be anyone to pull in"* (P9). P8 also expressed concerns about the level of effort and energy that went in to festival organisation. The evidence suggests that where members are involved in the ELC at a deeper level they assume many different roles and tend to participate across a broader spectrum of activities.

The findings demonstrate that what constitutes ELC practice differs from member to member; this can lead to perceived inequities in effort and commitment where the dynamics of motivation and involvement are not understood and managed at a community level. Differing motivations and perspectives were also evident at community level between the ELC group and group B (see case profile: section 7.1, p. 158), as P5 explained, *"when they were invited to the initial meeting one or two people from* [group B] *said we've always run the festivals really well and we don't understand what you want"*. P1 complained that although the website (previously managed by group B) was *"...fine it wasn't really functioning as a driver for business",* this may be a reflection of lifestyle differences between members of the ELC and group B. Some ELC members were also members of group B and depth of involvement varied but tended to be shallow for the majority of group B members.

7.3.1.2 The negotiation of meaning

When P1 was in a lead role and had the support of the core team, shared meaning was negotiated by the core team, and there was little evidence that members of the wider ELC engaged in this process. It was particularly evident during the crisis, precipitated by the resignation of P1, that the negotiation of meaning permitted practice to evolve (Lave and Wenger, 1991). Different perspectives were expressed at community wide level, as observed at the AGM and reported through community wide email: "*As discussed the other night I believe the way forward to best achieve the* [restructuring] *is: 1) We divide the businesses into different sectors. Water-based activities, accommodation, pubs and restaurants, The Islands, everything else*" (Email P10- ELC). The response to this email demonstrates marked differences in perspective: '*The word divide in a co-op may be wrong to use. I wish to suggest another way in which we could perhaps encourage membership participation and that is through* **Marketing** *which is the core aim and objective of our Co-operative anyway ... sharing the responsibilities dividing into business groupings such as accommodation, activities, pubs & restaurants places to see, would smack of self-interested groups looking after what they perceive to see as the most important. This way of sharing i.e. Marketing groupings would be more in keeping with our aims and I would think more innovative and exciting and in the long run more beneficial for the area*' (Email P8- ELC). Findings demonstrate that the crisis (the possible dissolution of the core group) creates a negotiation domain among all parties where new roles are open to members, this acts as a catalyst for the evolution of a new chapter in the practice of the ELC. Figure 7.1 (p. 168) overleaf illustrates the evolution of the learning community after the crisis.

Figure 7.1: Evolving learning community structure

Central chairperson & co-ordinator ⚪ (Broker)	Rotating chairpersons ⚪
Four Sub-committees	Secretary- minutes 🔴
Finance person	New liaison role 🟢
Other ELC members	Same four sub-committees comprising original committee members plus additional newly active member roles
	Other ELC members
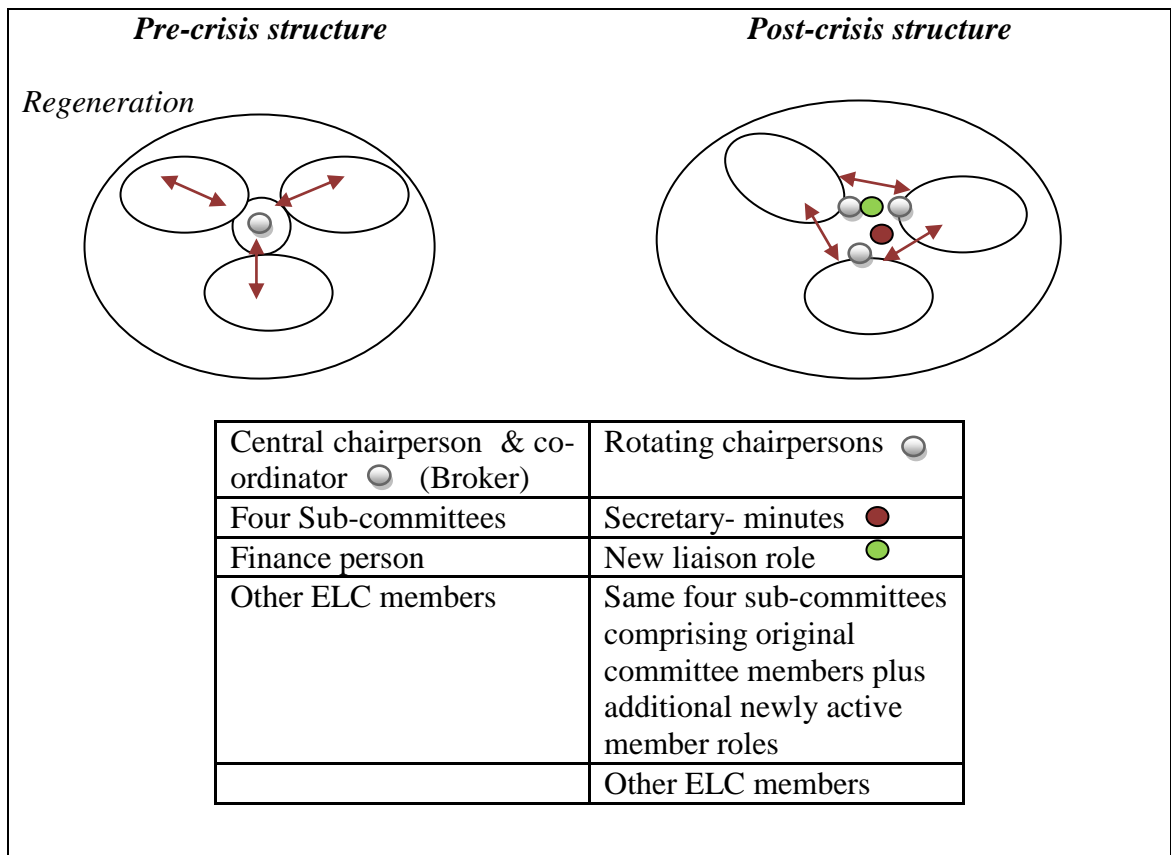
The crisis led to greater involvement in practice. At a surface level, all ELC members had an opportunity to negotiate meaning and refine practice; they were encouraged to attend meetings informally through conversations and more formally through group email invitations: *"You will have seen from the minutes of our meeting on Tuesday night, that a small steering group has been formed to take over from* [P1]. *On behalf of this group I am inviting you all to a meeting at* [P2's] *Hotel ...We will be discussing new ideas for marketing the village as a whole, and would welcome any suggestions....looking forward to seeing you all. Put your thinking caps on !!!!"* (Email: P5- ELC).

As time passed, the urgency of the situation was emphasised: *"I urge as many of the members to attend this meeting as possible...this is a crucial meeting about the future of the cooperative with some very important decisions needing to be made. It is YOUR*

cooperative and it needs YOUR involvement.... IF WE FAIL AT THIS MEETING THEN [the ELC] *WILL LIKELY FAIL. SO, I WOULD ASK EVERYONE TO TRY VERY HARD TO COME TO THE MEETING AND BE PREPARED TO INVOLVE YOURSELF IN THE RUNNING OF* [the ELC] *BEFORE IT IS TOO LATE. THE CHOICE IS OURS.* [capitals as per email]. *Look forward to seeing you there" (Email: P10- ELC).* Despite attempts to encourage the involvement of less active and new members, there were a substantial number of individuals that failed to get involved in the ELC to any degree. Observations suggest that it is difficult for less active members to get involved when they were not part of the practice in any real sense prior to the crisis. It appears that they do not fully understand why things are done the way they are. They are asked to take on roles, but do not really understand what the roles entail. A new member, asked to take on a role, replied nervously: *"I think that you* [P1] *are doing a great job and that you should keep going"* (P11). P11 did not take on a role despite having substantial experience and expertise that would have assisted with the website development. Other members cited time and work commitments as a barrier to getting involved at a deeper level.

Less active members were frequently asked for their opinion on matters but were hesitant to contribute and requests for deeper levels of involvement in ELC activities often hung in the air with no response. There is a discernible contrast in communication between active members and those that are less active. Observations at numerous meetings throughout the case study confirm that active members who frequently engage in practice and dialogue have a tendency to pick up where they have left off, as others have reported in the literature (Thompson, 2005; Wenger, 1998). This can be confusing for less active members.

It appears that different levels of involvement are accepted once there are enough people to complete the tasks at hand and keep the ELC afloat. The result of this short sighted approach is that individuals pursue their own agendas and where meaning is not shared at community level, the ELC begins to grow apart. There is a requirement

(mainly driven by micro-firm resource constraints) to divide tasks and responsibilities into the sub-committees. As a result, there is a marked difference between the learning dynamic of the sub-committee members and those that are not sub-committee members. This feature of the ELC differentiates it from learning communities found in larger organisational settings and makes it difficult to build and maintain a learning ethos between individuals at a community level. Attempts are made to counteract this issue in the ELC, for example updates and demonstrations are provided at meetings, meeting minutes are detailed and sent out to all members, and individuals *'chat at bridge...*[and] *meet up at different stages"* (P6) to discuss developments.

There appear to be other barriers to engaging in the negotiation of meaning. Members whose businesses are situated outside the village, *"feel that* [they] *don't have as much of a say in what goes on"* (P9) despite being actively involved in the ELC. Perceived geographical distance holds them back from deeper levels of involvement in the ELC.

Many non-active members attended the AGM in October, 2010. Later that evening, informal conversations between active members over coffee, suggested that the attendance of non-active members indicated a willingness to participate at a deeper level in the ELC: *"That was very positive...the turnout was good"* (P3); *"and wasn't it great that* [P14] *was there"* (P1). However, observed signals of non-participation at the AGM included, members sitting at the back of the room and not engaging in dialogue and negotiation. Similar signs of non-participation were evident throughout the study for example member's being absent from meetings and not responding to emails and/or requests for assistance. This behaviour may be a reflection of relationships that have not developed yet. They may also represent political tensions within the ELC.

Non-participation is accepted to a degree by brokers who are aware that some '*core members*' were very committed while others were only '*token members*' (P1). Many active members acknowledged that this was natural and to be expected in a group the

size of the ELC (comprising over 100 businesses). Despite this opinion, several other comments from active members demonstrate that non-participation causes frustration: "*it's* [the task of getting members to send information for the website] *like it's a chore ... it's not a priority, which makes the whole thing like pushing glue up a hill"* (P9); *"I send out the emails, but some people, they never read them"* (P8); *"I had the whole thing done you know, all they had to do was tweak it."* (P1). This perceived inequity in effort is an issue that Handley et al. (2006) also alluded to and it can lead to disengagement of active members over time if not managed.

A number of members are involved in ELC practice but only at a shallow/surface level. It must be noted that shallow involvement differs from Lave and Wenger's (1991) description of the 'legitimate peripheral participant' that initially learns at the border but strives to be actively involved in the CoP over time. For surface members full participation is not a goal. There are token/ surface members that have requisite skills, knowledge and expertise but still do not engage in practice (Table 7.3 below). It appears to be the case that, where individuals are genuinely committed to engaging at a deeper level, they volunteer for tasks and roles and other members of the group '*show them the ropes'*. Evidence suggests that learned helplessness (see glossary) can prevail in the ELC, much like in the FLN, and where the broker takes a step back (for example in the crisis) there is evidence that depth of involvement and learner autonomy increases (Reinl and Kelliher, 2010) as demonstrated in table 7.4 overleaf.

Table 7.3: Depth of Involvement and learner development

Learned helplessness	Learning broker encourages autonomy	Case evidence: deeper levels of involvement
"I won't take on the role [of chairperson]*"* (P3). *"I can't use that group email thing"* (P3).	*"I will sit with you and show you"* (P1).	P3 volunteers as a rotating chairperson with responsibility for emailing meeting minutes to group.
"We are asking for volunteers to take over managing the gallery images for the website from [P9]*"* (Email Secretary-ELC).	*"Training will be provided"* (Email Secretary- ELC).	*"Yes, someone did come forward, he is calling in next week and I will go through what's involved with him"* (P9).
"We need to organise the walking festival to get over the first hurdle and buy us some time" (P2). *"*[P1] *normally does that"* (P6).	*"What needs to be done"?* (P3). *"Will you hand over the folder* [P1]*"?* (P15). *"We can tweak this from last year's one"* (P3). *"We need to do more than that"* (P5).	Researcher field notes [ELC meeting]: *I noted that P1 remained very quiet, at first the group were unsure how to proceed, it was very obvious that someone needed to step in and assume a leadership role... Members were reluctant to speak up... the silence was uncomfortable... After a while members began to ask what needed to be done... This was the first time that I had noticed members really interacting and making decisions in relation to practice at community level.* The result: The festival was organised, the poster was tweaked and advertised in the local media. The health and safety requirements were put in place.

7.3.1.3 Level of skill and ability

Observations suggest that a level of skill is required to engage at a deeper level in ELC practice. Skill gaps among core members tend to influence the nature of involvement rather than depth of involvement, as P5 reported: *"I'm not very good on computers so that's a bit out of my depth really ... and I could help with the festivals and things like that"*. In the absence of a learning agenda, ELC practice becomes task and skills driven as individuals align themselves with practice that they feel comfortable carrying out, resulting in a shallow learning outcome in the absence of reflection (Argyris, 1977; Kolb, 1984). There is evidence to suggest that reported skills gaps could be an excuse for non-participation, or at least participation at a shallow level. P1 confirmed that the sub-committees are formed based on expertise, reinforcing this perspective within the observed ELC.

ELC members leverage internal expertise in an opportunistic fashion, for example P17 is a journalist and assists with editing the website and public relations material. The workload placed on experts such as P17 can influence their depth of involvement in the wider community. Over burdening members with tasks results in a 'burn out' scenario that is detrimental to community level learning in the longer term. Expert members acknowledged this issue, as P9 explained *"hopefully by the end of this year I will be able to handover to someone and take a step back, I have my own business to run also"*. This is also the case for very active members that *"have to look after* [their] *own business now and step back from* [ELC practice]" (P1). Although the challenges with managing CoPs have been highlighted in the literature (see Garavan et al., 2007; Wenger and Snyder, 2000) they appear to be amplified in this voluntary setting where micro-firm owner/managers also have their own businesses to manage in a resource constrained environment.

7.3.1.4 Sense of belonging

Members that participate intermittently in the ELC, often feel a strong sense of

belonging to the group although core involvement is not a goal for these members. There are also indicators that active members, frequently involved in practice do not feel a strong a sense of belonging to the ELC, just as Handley et al. (2006) described. The following example illustrates the complexities of different levels of involvement in practice.

Exhibit 7.1: Levels of Belonging

P4 is a former FLN member, she was present when the core group decided to establish the learning community and she is on the festival sub-committee. While P4 is involved in the ELC, this is not to any great degree, she rarely engages in the negotiation of meaning or in the development of ideas. P4 attends occasional meetings and volunteers for occasional tasks. The community aspect of ELC involvement appears to be important to P4. Being a lifestyle entrepreneur, she enjoys the quiet pace of life living in the ELC location. Others recognise different levels of involvement, as P1 remarked at a festival sub-committee meeting: "*ask* [P4]... *she is supposed to be on the committee after all*".

P12 attends the odd meeting. He is involved in a number of external tourism and business groups. He brings information back to the ELC group and outlines various developments in tourism and how the group could capitalise on future tourism trends. After a trip to an international tourism event, P12 attended an ELC meeting and told the group about the green box initiative, explaining how it successfully attracted world attention and suggested that [the ELC location] could be a possible "*blue box destination*".

P12 is not present at the majority of ELC meetings and is not a member of any of the sub-committees however he does actively identify tourism business development opportunities for the group and engage in the negotiation of meaning at a community level. These activities demonstrate a strong sense of belonging to the ELC.

Core members value P12's intermittent involvement and contribution; they encourage P12 to speak to the group and even discussed compensating P12 for travel and flight expenses as he '...*represented* [the ELC] *at a World Tourism event'* (P1) and had not received any subsidy to attend the event from the National Tourism Authority. However other active members do not place value of this type of activity, stating "*no* [P12]*'s not really involved at all in* [the ELC]*"* (P3).

Lave and Wenger (1991) verify that not all that is done can be called learning - an individual can be involved, even take on a task, but if they do not engage in developing shared meaning, mutual understanding is lacking and they may never move into a more active role in the ELC. In summary, the findings demonstrate that depth of involvement varies from shallow to deep and resultant learner identities have been categorised next.

7.4 Learning membership and identity

Several learning identities were observed over the duration of the case study, these have been summarised below.

7.4.1 Core member

Notably, all core members observed in stage one of the ELC's evolution had completed the FLN programme. These members have taken what they have learned from the FLN and put it into action in the ELC. They are deeply involved in the practice of the ELC. In the majority of cases, they have an active role on one or more of the sub-committees, or as chairperson, and they attend most of the meetings. Core members take on elements of the learner broker role to differing extents (this is discussed in more detail later in this chapter – section 7.5, p. 186). There is an intentional learning agenda between these members and *"learning from one another"* (P2 & P5) is at the heart of what they do. They remind other members *"that's not what we're about"* (P1) and they are recognised by other members as being core to the group.

7.4.2 Active member

These members are actively involved in the practice of the ELC. Although learning can occur through practice, it is unintentional and there is no learning agenda. Active members feel a sense of belonging to ELC practice, but their perspective of practice differs from member to member, dependent on the activity they align themselves to. As such, they frequently emphasise specific aspects of ELC practice that they feel aligned to. They too attend many ELC meetings and are perceived as active members by the rest of the group.

7.4.3   Intermittent expert

These members feel a sense of belonging to the ELC but they do not take part in practice on a regular basis, nor do they have a formalised role in the ELC. It must be noted that the intermittent expert identity is rare, with few members observed displaying characteristics associated with this learner identity. The frequency of their contribution is sporadic; however, when they do attend ELC meetings they bring valuable (from a learning perspective) expertise and information (see exhibit 7.1 for example). Core members value this contribution, but evidence suggests that while active members place value on contributions to ELC practice/ tasks, they place little value on this type of involvement from an individual member perspective.

7.4.4   Surface member: Less involved

These members are only involved at a surface/ shallow level. They get involved in specific elements of practice from time to time but not to any great degree, they may or may not have an assigned role in the ELC, but where they do it is merely a token role. Surface members go through the motions of involvement, attending meetings, manning stalls at the ELC festivals, but they do not engage in the negotiation of shared meaning.

7.4.5   Non-active member

These individuals are members in name only having no role in the ELC. They sign up and pay their fee to be included in the group's website and brochure. They attend important meetings like the AGM, but this appears to be as a result of peer pressure (through community politics) to do so. Their non-participation is evident from their absence at the majority of meetings and their silence at those they do attend, while other ELC members around them negotiate shared meaning.

7.4.6   External stakeholders

A number of external individuals engage with ELC members as business, tourism and community stakeholders through a process of local manoeuvring (see glossary). They include for example: members of the regional business development body, the local historian, and various community council members. They are not ELC members, and do not feel a sense of belonging to the group. They are involved because they have an interest in the development of the location/ region and a duty and/or an interest to engage with and support ELC activities. Others are drafted in to fill knowledge or expertise gaps and occasionally they are reimbursed for their time and efforts. These external stakeholders contribute to learning in the ELC to varying degrees, often providing valuable resources that would be otherwise unavailable to group members (these resources are discussed further in section 7.8.1, p. 225).

7.4.7   The development of identity

Identity evolves over time as members engage in practice and develop learning competence. A number of criteria influence the development of identity, these are discussed next.

7.4.7.1 Awareness of role and contribution

Individuals articulated what their contribution entailed during informal conversations and interviews in the initial stages of the case study. Active members appeared very aware of the contribution of others, as several email communications and informal conversations confirmed: "*Just to add my thanks to* [P1] *for all she has done over the years. Also thank you to all the people who took on jobs in the past. Let's hope there is a bright future ahead for* [ELC location]" (Email: P12- ELC). Learning resources such as the meeting minutes and ELC email are used to highlight various roles and activities in the community. While the initial evidence suggested that individuals know what the role of other members entails, it is clear from later evidence that they are sometimes unaware of the level of involvement and contribution of their peers. This is the case

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even among core members, as P10 confirmed, *'It is only now coming to light just how much time and effort* [P1] *devoted to* [ELC] *business. This is a little daunting for those who might try to pick up the reins where you and the team have left off.'* It is clear from the above discussion that actual role and identity, differs from perceived role and identity. The evidence suggests that pre-dominantly, value is placed on immediate tasks/ activities (this finding mirrors the micro-firm learning environment as Sullivan (2000) and others described) and higher level learning activities are less valued.

There are expectations associated with various roles, when these expectations are not fulfilled it does not go unnoticed among community members. Following a member's poor interaction with the local press at the opening of an ELC event, P5 commented on P14's poor performance: *"I was thinking if there was everyone here from the press what on earth were they going to write about"*. Later P5 explained that P14 had a role in promoting the ELC location at the event and she associated that role with a level of communication skill that was not displayed.

Where individuals have a substantial workload at individual or sub-group level they are likely to be less involved in the practice of the wider community as P9 explained, *'I try to steer clear of the rest of it because there is an awful lot of work in doing the website'*. These members can only develop higher level learning competences if they are given the time and opportunity to do so. Where practice is situated at sub-group level rather than at community level, learning membership and identity (LMI) can form at sub-group level (Wenger, 1998).

7.4.7.2 Membership criteria

Findings demonstrate that there are certain conditions attached to ELC membership. Some of these conditions are made explicit. The following case example (exhibit 7.2) offers insight into how these conditions are implemented in the ELC.

Exhibit 7.2: The membership fee

A nominal membership fee enables the group to engage in further practice. Numerous conversations over the duration of the case confirm that *"Collecting money from members has been a very arduous task"* (P3). When active members began to ask, *"What happens if they don't pay the membership fee?"* P3 responded that the group *"...need to be more strict and have a definite deadline".* The option to remove non-paying members' business listings from the website was suggested at a later ELC meeting. There were a few 'raised eyebrows' following this suggestion.

P1 acknowledged that ELC members were having a tough time financially, but reminded those present that the opportunity to discuss various payment options was offered, but no one had availed of that opportunity. After a time, the group agreed that *"<u>invoices would be posted to members, payable within 30 days</u>. The payment due date will be on the invoice <u>and if the fee is not received by the treasurer</u> [P8] <u>within the allotted timeframe, the business will be removed</u> from* [the ELC website]. *Members can rejoin at any time once the fee is paid, but they will be omitted from the brochure if the fee is not received before the reprint"* (ELC meeting minutes: Chairperson – ELC).

The website is perceived as a valuable aspect of membership to many ELC members. The threat of being removed from the website is being used as an incentive to encourage members to pay the membership fee. This finding is further substantiated in the following decision: *"<u>non payment will mean exclusion from the brochure (and possibly the web, unless</u>* [group B] *<u>was paid for book/web entry separately")</u>* (ELC meeting minutes: Chairperson P31- ELC).

During a subsequent update on the financial situation, P8 provided details of outstanding membership, these details were posted in the meeting minutes where individual names were outlined and the following explanation attached: *"these* [list of non-paid members] *have all been notified (in minutes of meetings on numerous occasions) as well as phone calls or texts over the last couple of days and are urged to pay up for all the work the Cooperative has done on their and everyone's behalf – this year alone 30,000 brochures were printed and distributed nationwide, 1,000 Heritage Trail brochures, 2 festivals and PR & publicity.* [P36] *has kindly offered to follow these up and will report back to the group".*

Following this communication, fixed dates were set to exclude members if the fees remained unpaid. Shortly after this effort most of the outstanding fees were paid.

The case example above highlights a number of tensions that underlie ELC membership and identity. These tensions amount to breaches of the psychological contract between active and non-active members (these are discussed in greater detail in section 7.6.8, p. 212). Observations indicate that payment of the fee demonstrates a tangible commitment to the learning community.

The example above also illustrates that some ELC members pay a membership fee to group B (for business listings in the book and website) and as a result they are exempt from paying a fee to the ELC. This may be a factor that contributes to the political tension between the two groups, but nonetheless it reinforces the notion that the membership fee is for advertising on the website and in a tourism book (produced by group B). While an individual cannot be an ELC member unless they pay the fee, they can be a member without being actively involved in the ELC. This suggests that membership criteria require alignment with the objectives and aims of the learning community.

An unexpected influence on learning membership and identity that may be particular to the tourism setting was geographical distance and its influence on identity. Some members perform their role/ task in a site remote from the ELC location (where the majority of members live and have their business) and this creates a barrier that may prevent these individuals from moving to the core of practice, as P9 explained *"because I don't live there I feel that I don't have a right to an opinion on some subjects because it doesn't affect me ... I try to leave that to people that actually live with it"* (P9).

Over time, rules of inclusion regarding the website were made more explicit at sub-group level and ELC members were informed that, "*A company's listing on the website is conditional to being a paid up member of either* [the ELC] *or* [group B] *(the book), reciprocal linking of each other's website (as outgoing links do not help the Google ranking) and of course submission of image or logo and wording. This <u>has been decided</u>*

by the website development team as a prerequisite to inclusion on the new [ELC location] *website. Take a look at the site to see what the website team mean...they are about to set some deadlines and you don't want to be left out of the site"* (ELC meeting minutes: P31 [chairperson] - ELC). This is a strong development from earlier attempts to encourage members to engage in practice. Excluding members from the ELC is obviously difficult in a small community setting, however, since the crisis there appears to be a move to an activity baseline throughout the ELC. Having secured a mandate to continue from the wider ELC community and democratically constructing shared meaning of the ELC going forward, the new core team are forcefully laying down rules of membership and involvement.

7.4.7.3 Structural criteria

After the crisis, there were a number of notable shifts in the ELC's structure as demonstrated below in Table 7.4.

Table 7.4: Post crisis ELC structure

Activity	Original Structure	Post-crisis Structure
Chairpersons	P1	*P3, P7 and P10*
Website	P7, P9, P10, P20	*P7, P9, P10. There are also members of [group B] who are members of this group.*
Fáilte Ireland liaison		*P8* (ELC meeting minutes: Chairperson - ELC).
Finance	P8, P3	*P8, P33 (for the Islands), P34, P35*
Marketing	P1, P2, P6, P33	
Brochure		*P1, P23, P31, P2*
Festivals	P4, P5, P6	*P4, P15, P30, and P5*
Minutes	P1[20]	*P28, P31, P10, P3*

[20] Although P1 ended up sending the meeting minutes, another member was supposed to take on that role but failed to carry out the task.

One major structural change is the shift from a one-member chairperson/co-ordinator (as illustrated in Table 7.4) to a multiple chairperson structure comprising active members. The website sub-committee membership has hardly changed post crisis but as this is an expert driven committee, this is hardly surprising. P20 is no longer in the website sub-committee but observations suggest that P20 was not very active in this role. However he may have been put in place as a mediator between the ELC and group B, having demonstrated an affiliation to both groups. P8 (formerly finance) is now the Fáilte Ireland liaison, this role has been granted legitimacy since the crisis. Interestingly, the marketing function does not feature in the new structure despite reminders from some members that '*we are a marketing co-operative after all*' (P3).

No longer directly reflecting the immediate tasks/ short-term activities of the ELC, the learning infrastructure is now more flexible and sophisticated than it previously had been. Movement from and between roles influences LMI over time, as exhibit 7.3 illustrates.

Exhibit 7.3: Caution - New roles under construction

P8 had an active role as treasurer of finance; she was also active in a marketing role for the ELC. P8 now has reduced responsibility for the ELC finances, but has a new Fáilte Ireland liaison role. P5 is a very active member who demonstrates behaviours associated with the broker role; however these do not always transfer at community level. P5 has to date been overshadowed by more vocal members such as P1 and P3. Since the crisis, P5 has remained in the same sub-group but there is quite a different learning dynamic in that sub-group since the crisis.

New members have joined; two had not been actively engaged in the ELC (P15 & P30) and another (P4) who had previously been involved in ELC practice at a very shallow level has a deeper level of involvement.

(Continued overleaf)

In the initial stages of the crisis, P1 encouraged P5 to send out meeting details to the wider community. In the final stages of case study observation, and in the absence of more dominant members, P5's voice was being heard a little louder than it had been previously. P5 now communicates to the wider community on behalf of the core group from time to time. P3, P9 and P10 are now in a more central position in the ELC as they have responsibility to chair the meetings.

Of the three new chairpersons, some are core because they are more involved in practice and learning (for example P9 is engaged in sub-committee work and also demonstrates traits of the learning broker) and while others are very active members (P3), they do not place value on the learning aspect of ELC membership. Roles are continuously re-negotiated over time as individuals move on, or out of the ELC. P3 had responsibility to collect the membership fee (along with other members) and P3 was also actively involved in the organisation of the festivals and events. Asked at the AGM if she would take over the role of chairperson, P3 refused, explaining *"I feel that I have done my share"*. P3 later offered to take responsibility for the accommodation sub-group. Further probing revealed that P3 was prepared to *"step in if there is a danger that it will fall apart, but* [was] *not prepared to take it all on"*. After the crisis, many members expressed the sentiment that a lot of the ground work was complete and that aspects of the ELC's practice would be less time intensive moving forward.

Comments such as: "[the meeting minutes] *don't need to be that detailed"* (P3), suggest the subtle changes that individuals would make in alignment with their interpretation of ELC practice.

P3 is now part of a revolving chairperson structure with occasional responsibility to provide the minutes of the meetings, and as such she is in a core role wherein she can influence practice.

While roles are quite set in the new structure, there is evidence of greater cohesiveness and movement between various functions and tasks. Certain learner identities are more effective in certain roles and achieving a good balance of learner identities at the core seems to be positive in terms of maintaining a learning emphasis and an action/reflection balance (as others have previously suggested: Halme, 2001; Jørgensen and Keller, 2008; Kelliher and Reinl, 2011; Wing Yan Man, 2007). Observations over the duration of the case study also validate the importance of detailed meeting minutes to the ELC's success in the longer term, especially as their value is not understood by all of those at the core of practice (as confirmed by P3 in exhibit 7.3 above). A key

finding of this study is that the email communication (meeting minutes) is a crucial community level learning strategy.

7.4.7.4 Multiple community membership

P9 is pre-dominantly engaged in website development on behalf of group B and the ELC. P9's identity in the ELC is that of website developer for [the ELC location]. He is a member of both groups (ELC and group B) and this co-membership influences his participation in practice and learning within the ELC, as he explained during an interview, "*It does* [influence his work], *I mean if you go off and do something for one side, the other group gets into a sulk... I suppose it's less straight forward than it could be.* [Group B] *is not the same structure, there is a small committee and it's more organised, but there are no subscriptions it's more ad-hoc. There are pros and cons to each approach, I'm not sure that one is any better than the other*". This finding concurs with Handley et al.'s (2006) findings that identities develop between multiple communities. P9 aligns himself with both groups and perceives the website development as a [ELC location] task that he carries out as part of his '*civic duty*'. Adding to the complexity of membership and identity, P9 explains that '*...strictly speaking* [the website sub-committee is] *not an ELC committee, although everyone in it is an ELC member'*. This seems to suggest that in the eagerness of core members to establish buy-in at formation stage, they neglected to establish shared meaning. This has caused issues as the community evolved organically in the absence of rules of engagement. Although as P5 confirmed "*Initially* [we] *said ... why don't we involve the whole village ... but it's quite hard to keep some people on board... if you knew what was ahead you wouldn't start ...not knowing, I don't think it could have been done much better... you can only take it so many steps at a time*" (P5). This suggests that members had to establish buy-in at the early stages of ELC formation, creating a delay around setting rules of engagement at the outset.

7.5   Learning broker

A number of individuals display attributes/competences associated with the learning broker role to varying degrees. P1 is very strong in this role and although P1 has stepped down as chairperson, there are indications that P1 will retain aspects of the broker role on a more intermittent basis, promising others that she would pass on any information that she came across to the new chairperson.

A learning broker that holds a dominant position in the ELC (for example P1 as chairperson and co-ordinator) has a lot of influence on practice/ learning, this influence can be positive but it can also be negative. In a voluntary setting like the ELC (comprising 100+ businesses), it is not feasible that this role could be the responsibility of any one person and be effective in the long term (mainly due to resource constraints associated with a single individual, who also runs their own business). Indeed the findings suggest that a single broker (even one operating on a full-time basis) would not be optimal or desirable in this setting considering the collective learning ethos.

Some members demonstrate certain characteristics associated with this role at different junctures of practice, for example P9's website demonstration. In some cases, this activity appears to be driven by their frustration that particular tasks cannot be completed without the contribution of others. As such, although these activities facilitate learning, they are often ad-hoc and lack an overarching learning strategy and goal(s). Many ELC members are action focused and they rarely demonstrate behaviours and/or traits associated with the broker role (as identified previously in 4.1.1.1, p. 68).

At times, the learning broker's activities are recognised by other ELC members *"[P1] has a particular set of skills you know she very good at bringing people together. She communicates very well, she's very organised"* (P5); *"P12 is great at bringing back information to the group"* (P1). When the new core structure was suggested, active

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members identified a number of important roles that P1 had assumed in the ELC these included; coordinating people and work; communicating within and outside the group; liaising with external stakeholders and keeping the group informed of developments and opportunities for learning and practice.

In the initial stages of ELC establishment, P1 ended up assuming the role of secretary in addition to chairperson, co-ordinator and broker. During an informal conversation, P1 explained that the original member who had volunteered for the role of secretary never took up the position in practice. Others were unaware of this issue commenting, *"I don't know why* [P1] *didn't bring it up, or how we didn't pick it up"* (P3). As chairperson, P1 controlled the direction of meetings. P1's involvement in the ELC was complex and comprised multiple roles. P1 used the meeting minutes (which was then part of the chairperson's job to produce) to conduct many activities associated with the learning broker role. Where these roles become separated, as they did when the new structure was decided, members need to recognise the value of these activities or they may fall between the various role descriptions and associated responsibilities. The indications are that since the re-structuring, other members have demonstrated development in the broker role. When prompted to reflect on P1's role encompassing more than the administrative work of a chairperson and extending to one that seeks opportunities to learn for the ELC members, P1 took a moment to reflect and stated *"Well maybe I'll have more time to do that now"*. This further illustrates the complexity of P1's role and its impact on individual learning in the ELC.

As time passed it became apparent that a number of P1's activities were part of a coordinating function and they had little learning emphasis (these activities are discussed in the following section). Notably, the learning broker has a specific role in managing expectations, enabling engagement, identifying competence shortfalls, identifying learning opportunities, leveraging learning relationships and raising the profile of the learning community (these activities are discussed in section 7.5.2.), and these activities may have been detracted from through the fulfilment of more technical/ coordination tasks detailed above.

7.5.1 Coordinating people and work

In line with this role, P1 frequently reminded members about deadlines for funding and sending information to Fáilte Ireland, the brochure and advertising in tourism media. Training event details were also provided. There were a number of instances where information on opportunities for learning and practice were passed on to the wider group (for example P8 passed on the information from the regional business development body on local IT training courses). There have been several acknowledgments of the value and importance of this external engagement role among members.

P1 also managed roles and tasks in the ELC. Through the meeting minutes she provided details of the tasks that people were undertaking and also highlighted those tasks that needed to be carried out by others: *"Pubs and restaurants are encouraged to do promotions during this week from Sunday 20th February, details of which can be posted on the sailing club board. [P3] is organising a sheet of [ELC] information which can be put in to goody bags, which the children will receive on arrival"* (Meeting minutes- P1: Chairperson - ELC).

Over time observations suggest that the core group are not always best positioned to carry out the role of co-ordinating work, and P10 in particular, although not in the core group, was very effective and forceful in this role after the crisis.

Another aspect of the broker role is the ability to build social capital and nurture internal and external relationships. P1 has established many relationships with external groups like Fáilte Ireland. In particular, the relationship with group B requires management and some members acknowledged this as being part of the remit of the leadership/ core

group "*they* [group B] *had always run the festivals, there was a way of doing things.* [P1] *should have* [got buy-in from group B] *from the start*" (P3).

7.5.2 Learning broker activities

There is evidence to suggest that the broker has a role in managing the expectations of members. P9 among others expressed disappointment at their role not being managed better. Expectations appear to differ in line with depth of involvement and these expectations require management.

Brokers guide pro-active behaviour through email communication and at meetings. They invite internal and external individuals (experts) to present to the wider group. There is evidence that the broker encourages members to reflect on practice, and refection is enabled as members question practice and encourage others to engage in dialogue as the following quote demonstrates: *"I have not received any further topics to be added to the Agenda for next week's meeting, so hopefully we'll see as many of you at the meeting to discuss the way forward for 2011. Any other business can of course include* <u>*whatever point of interest or views you wish to share*</u> *with everyone"* (Email/meeting minutes: P1[Chairperson] - ELC). While brokers enable reflection through this process, the findings suggest that this approach is action driven. The broker also enables engagement and has a role to play in inducting new members into the group.

While the broker identifies competence shortfalls and plugs skill gaps in the ELC, so too does the wider community. Examples of this include: P9 realising that members did not appear to have IT skills and providing training for same, and P12 presenting 'key developments in tourism' feedback from his international trip. Several opportunities for learning were also identified by various ELC members. The information was passed on to the wider group: "*Received this e-mail today from* [the regional business

development body] *should anyone wish to avail of any of these courses there is an application form also included*" (P8) through email communication and word of mouth. While valuable, there was little evidence to suggest that this activity was conducted in any kind of a strategic manner in the earlier stages of the case study, but when the group discussed elements of P1's role and activities post crisis, they identified important aspects of the position and explored a range of solutions to 'fill the gap', demonstrating a shift from short-term action, to a more balanced action – reflection interaction.

The learning broker also has a remit to leverage relationships with external agencies that support ELC activity. On standing down as chairperson, P1's listed the ELC's achievements to the wider group. The list included relationships built with a variety of external stakeholders (outlined in Table 7.6, p. 206). This action demonstrates an explicit awareness of the learning value placed on these relationships. Underlying that value is recognition of the need to keep informed about the external business environment, the need to create awareness about what the group are doing and the supports available to sustain that activity.

There were many instances where the ELC were represented at various events by members at regional, national and international level. P1 made these activities visible through the meeting minutes, placing value on these activities by thanking those members involved and reinforcing how this type of activity raises the profile of the ELC destination, and improves cooperative engagement. 'New ideas' brought back to the ELC also instil momentum in the ELC's evolution. Despite the efforts of the broker, the findings demonstrate that activities such as these need to be legitimised at community level and there is a tendency for the broker to overlook the importance of this, if the job at hand is getting done. It must be acknowledged however this may be a reflection of P1's significant workload and the complex nature of her role in the ELC as mentioned above (section 7.5).

The broker continuously promotes the efforts of the learning community in addition to the ELC location. This is the case where there is a media presence and potential publicity for events, but it is also the case when P1 addresses the ELC members, or members of the public attending ELC events. The activity was not observed among the other members over the duration of the case study, however instances were noted of missed opportunities to promote the work of the group. For example, P7 welcomed members of the public to the Walking Festival but did not mention the ELC. P14 greeted the press at the opening of an ELC event and never mentioned the work of the co-operative.

7.5.3 Learning strategies

Based on the social learning perspective, a learning strategy is apparent where there is evidence of observable actions and behaviours that facilitate and orchestrate learning as ELC members interact in practice (Wenger, 1998). An observation guide was developed from the learning strategies highlighted in the literature (see appendix C, table C.4). Over time, observable learning strategies emerged through cycles of coding and crystallising observations, interview transcripts/ notes, ELC communications and the researcher's reflective diary. The observation guide was refined over time to reflect emerging learning strategies from the case data. Findings demonstrate that these learning strategies exist at various levels in the ELC (as depicted below in Table 7.5 below).

Table 7.5: Learning strategies and associated activities

Criteria	Individual level	Sub-group level	Community level
Observable learning strategies	Identify opportunities for learning & practice; Identify & volunteer for learning roles.	Sub-committee sets; Discourse & negotiation.	AGMs facilitate community wide discourse, negotiation & reflection; Communication strategy Individual and sub-group reports, demonstrations, tutorials & updates; Role allocation & succession planning.
Learning strategies: associated activities	Individual level	Sub-group level	Community level
Embedding pro-active behaviour	Requires legitimacy in broker role & shared meaning		
Mapping skills & closing knowledge gaps	Individuals identify learning requirements.	Knowledge gaps & solutions are discussed.	Training ensues Succession planning is required.

Addressing the reflective balance	Individuals question the relevance of practice, resources etc.	Issue is raised; Space is required for reflection.	A solution is sought/ negotiated; Space is required for reflection; Leverage collective experience; Map and close knowledge gaps.
Identify learning opportunities	Local manoeuvring; Build social capital.	Opportunities are discussed.	Opportunities are developed and practice is negotiated/ orchestrated.

Successfully incorporating individual and sub-group activities into a community wide learning strategy and agenda is a complex process that requires a level of learning competence (Wing Yan Man, 2007). Wenger (2000) contends that a learning agenda is discernable through the learners' engagement in activities that enable ELC practice to develop. These activities include, local manoeuvring and identifying learning opportunities. There were many instances of local manoeuvring in the ELC over the duration of the case as the following exhibit (7.4) illustrates.

Exhibit 7.4: Local manoeuvring

ELC members are opportunistic in relation to taking on the co-ordination and delivery of various events that lead to further opportunities for practice. Through a process of local manoeuvring, members hear of the possibility of a sailing event that could bring substantial tourist numbers to the area, provided there are organised events, activities and promotions for the visitors.

The group discuss the potential of hosting the event at an ELC meeting: "*if we can get together to deliver some activities, packages for the children and families there's no reason why we can't have that* [sailing event] *again next year and the following years*" (P1).

Learning is facilitated as ELC members attend and participate in off-site events where they manage tourism displays at supermarket open days and attend international tourism conferences and regional industry events.

(Continued overleaf)

At these events, individuals raise the profile of the ELC location, they learn what they can, and they bring this information back to the ELC: "*[P12]* attended the Adventure Travel World Summit on 4-7 October in Scotland – he networked with 500 people from 50 countries, handed out *[ELC]* brochures and summarised some of the key points that emerged from the summit: buzz words are "experiential holidays" and networking. Huge markets to get ready for are India and Asia. Fáilte Ireland and Tourism Ireland had a stand and were well represented, but few countries even knew where Ireland was, let alone consider it a tourist destination. Next year's summit will be in Mexico*" (ELC meeting minutes).

On their return, members share what they have learned at ELC meetings and, to date, detailed meeting minutes have kept absent members informed of developments, and have also highlighted the external activities of those members, for example: "*Thank you to [P16] and [P15] for representing [the ELC] at the tourism showcase event called "Rediscover Cork", chatting to people and distributing brochures. It was well attended by members of the public although could have been better advertised. The venue was good, tables and [table] cloths with backdrops for those who wanted these were all in situ, and participation fee was €20. [An ELC business] also had a table. All participants had said they would do it again, were prepared to pay more if that means better PR/Advertising for the event etc*" (ELC meeting minutes).

7.5.3.1 The learning agenda

The learning agenda relates to the programme of activities that facilitate learning. However, these activities need to be part of a community level learning strategy to effectively facilitate individual learning in the ELC. Exhibit 7.4 demonstrates the presence of community level learning strategies, and although they are in most instances informal, they are not unplanned. Event attendance is considered in advance and a process is in place to ensure that valuable knowledge is disseminated in the wider community. Evidence of a recognition strategy is also present, demonstrating that value is placed on these activities. These strategies are orchestrated in the main by one ELC member (P1). Shortly after P1 took a less active role, one or two members began to question why the meeting minutes had to be so detailed, others complained about the meetings being too long. Despite the rationale to create community wide engagement and negotiation, these comments and observations suggest that many members still do not see the learning value of these strategies. This may be a challenge to the survival/ evolution of the ELC in the long run.

The lack of formalised planning in individual businesses was evident: *"it was all kind of serendipity the way it* [the development of the business] *moved"* (P5) and this was mirrored in the early stages of the ELC's development, where one active member conceded that '*we just threw ourselves in to it head first'* (P5). The emerging ELC structure and initial meeting minutes from P31 (post crisis) indicate that levels of dialogue and reflection remain detailed in ELC communications, despite protestations from some members. Other indicators that strategies remain in place include the allocation of the new Fáilte Ireland liaison role to P8.

7.5.4   Embedding pro-active behaviour

In considering how to embed pro-active behaviour in any kind of a strategic manner, the voluntary nature of ELC participation must be considered. Certain ELC members display a preference to take on the role of learning broker (Wenger, 1998), even in the absence of formalised roles and norms such as those found in organisational settings. Embedding individual activities and behaviours into a community level learning strategy is a complex process that takes time in an independent learning environment (Halme, 2001; Wing Yan Man, 2007).

The learning broker guides pro-active behaviour and encourages members to get involved in practice. Following this type of activity a *'thank you'* is always formally extended to all who helped organise events. However, where members do not engage in ELC activity, the broker is tentative, acknowledging the limitations of the voluntary ELC setting, as P9 explained: *"when it's a company it's* [active involvement] *a straightforward process, but when people work collectively in a voluntary capacity it's difficult, you can't force people"*. Despite these difficulties, findings suggest that learning brokers see the 'learning value' of community-level strategies and over time they become the norm, '*the way we do things here'* (P6). Only then can these activities begin to resemble a community level learning strategy, albeit an informal one. The observations above illustrate anomalies that are specific to voluntary learning

community settings and reinforce the importance of establishing shared meaning at community wide level in the early stages of a learning community's evolution.

7.5.5 Mapping knowledge and skills

As ELC practice takes a new turn, or becomes disrupted (for example, as a result of the crisis in this case study), knowledge and skills are mapped, and gaps are identified and filled where possible. New learning projects may also instigate a knowledge and skills audit, and members leverage internal and external resources: "*...the facility to have foreign language sites in the future needs to be written into the software from the start. This will be done for 5 languages (suggested French, German, Spanish, Dutch & Italian). The cost by* [the website development company] *is not for translation – that needs to be done by ourselves as a group (we'll need volunteers for translations)* [emphasis is P1's own]*"* (Email/meeting minutes: P1 [Chairperson] - ELC).

As members stand down from different roles (on a permanent or intermittent basis) and practice is disrupted, skill deficits are highlighted. In such instances, the suitability of experts, stand-ins or replacements is discussed among the group. Over time, awareness of the knowledge, skills and abilities of others increased in the ELC and a growing realisation of the importance of succession planning was observed, as members realised: "*that's* [group dissolution] *what happens when* [management of the group's activities] *is all left to one person"* (P13).

During the crisis, a new role was identified as important to the group going forward, that of '*Fáilte Ireland liaison'*. Further investigation about how this role was identified revealed that: *"*[a number of active members] *realised that* [P1] *provided a lot of information to the group from Fáilte Ireland and we realised that would be missed when* [P1] *stood down"* (P8). This series of events resulted in the dilution of a dominant learning broker's influence over the group, and the dispersal of the role among a number of ELC members (Table 7.5, p. 182). As time passed, observations

demonstrated that the crisis instigated deeper involvement from other ELC members and learning competences visibly strengthened as ELC members tried to get to grips with the tasks associated with their new or expanded roles. Quieter members were suddenly actively encouraging the involvement of others and taking on new responsibilities themselves. This coupled with the deconstruction of P1's position after the crisis and the subsequent re-structuring of the ELC represents a significant development in the ELC's learning infrastructure and individual learning development.

In contrast to Wenger's (2000) findings that CoP members firstly assess their knowledge gap and seek learning projects that enable them to close those gaps, in the observed ELC, it appears that the learning agenda is triggered by practice (business development and increased tourism), suggesting an external learning impetus. ELC members adapt and learn as opportunities for further practice/ development arise. Exhibit 7.5 illustrates this process.

Exhibit 7.5: The grant

ELC members market their tourist location through a website and brochure. They scan the environment for opportunities that help them to achieve this goal. They attend conferences or join various external committees and networks. ELC members became aware of funding that could assist them to develop the website and brochure, but they realised that they needed to submit a detailed proposal in order to qualify for the funding. Being a small community with a limited pool of resources, available in-house skills were identified, for example: "[P8] *has a finance background so she can manage the accounts*".

Once internal skills and skill deficits were identified, resources were leveraged in the external environment (as depicted in Figure 7.2, p. 199) through a process of local manoeuvring. An expert was also employed to assist with the application process.

(Continued overleaf)

The application for funding was successful, but there were a number of conditions attached to the funding agreement, as explained at an ELC meeting, "*There was some positive feedback from* [a funding body representative] *on our application ... Certain conditions include close monitoring of the effectiveness of this grant in terms of increased tourism numbers, hits on the website, job creation etc. Therefore we need to have in place a "customer feedback questionnaire" - which we talked about a year or so ago.* [P1] *will redraft and we'll get them printed with an undertaking that all* [ELC] *members will try and get every customer to fill one in ...We will need to submit this in report format to* [the funding body] *after 2 and 5 years"* (ELC meeting minutes).

The external engagements discussed above trigger a learning agenda (Wenger, 2006). Addressing the reflective balance is discussed next.

7.5.6   Addressing the reflective balance

In the ELC, the process of negotiating future practice and the subsequent re-evaluation of past endeavours provides the context for individuals to address the reflective balance (Kelliher and Reinl, 2011; Wenger, 1998). There were many instances where practice and future learning requirements were re-evaluated; this was particularly evident during the crisis. This important factor in the sustainability of learning communities has been highlighted previously (Bessant and Tsekouras, 2001; Kekale and Vitalia, 2003). Efforts made to incorporate reflection at community level were also evident at the ELC meetings and reflected in the meeting minutes: "*On the agenda- Heritage Festival (post-op comments and suggestions)"* (Email: P1: Chairperson - ELC).

In summary, lacking the resources available in large organisational settings, the ELCs learning strategies are unarticulated and informal; they are fluid, organic and opportunistic. However despite lacking in formality, the learning infrastructure is sophisticated, as illustrated in Figure 7.2 overleaf.

Figure 7.2: ELC learning strategies

--------------------*Time & sustained interaction*--------------------

Evolving Practice

Emergent learning agenda

Leveraging the resource pool

Local manoeuvring

Scanning & negotiating practice

Local manoeuvring
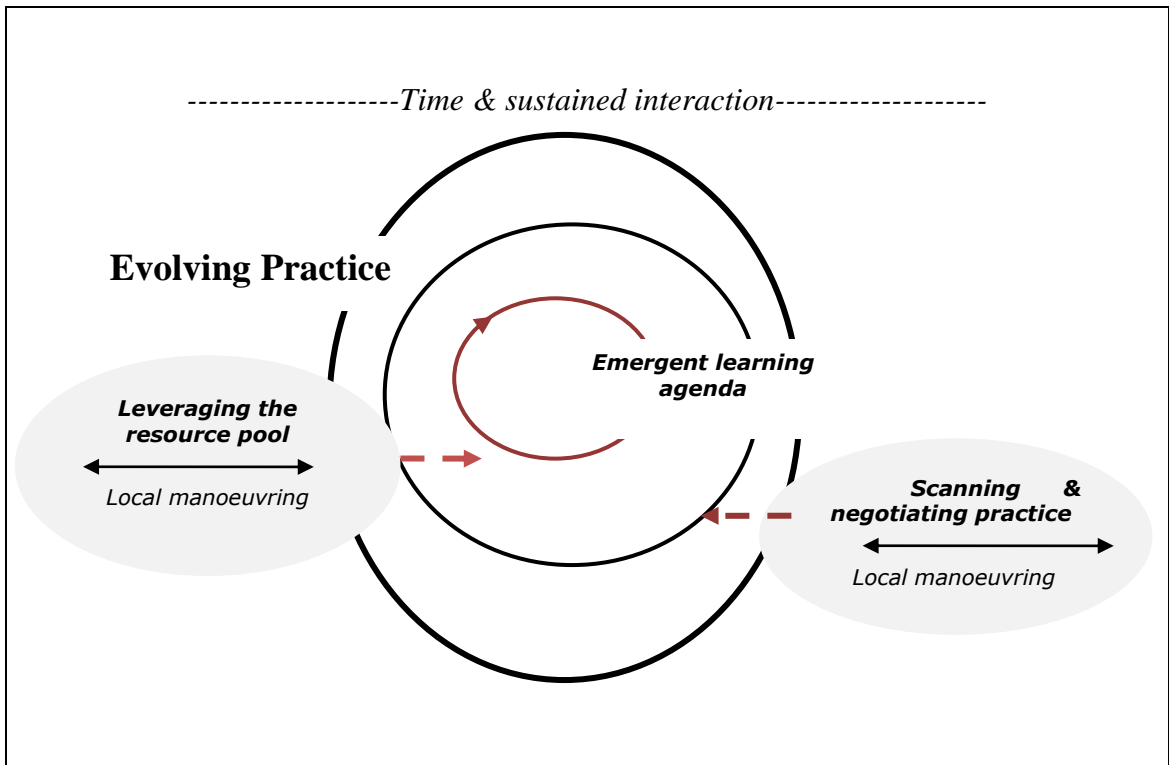
7.5.7 Levels of practice and learning

Under a resource-based framework, ELC activity pre-dominantly occurs at an individual level (for example P9 works on the website from his home) and sub-committee level (sub-committee meetings are held to negotiate and plan the various aspects of practice; the festivals, the website, or marketing the ELC location). Individuals learn as they engage in practice but if their activities are not integrated within a community level learning strategy, practice and learning resides at the individual or sub-unit level and remains invisible to the wider community. As such, the ability to leverage the resources of the wider community is compromised and over time the sustainability of the ELC is threatened.

Learning strategies that ensure individual and sub-unit activity and learning are made visible throughout the community do exist, as P1 explained: '*The sub-committees don't*

do minutes ... but they report back at the main meeting and then at least ... we get to see how they [sub-committee activities] *have developed'* [P1]. Pro-active behaviours that facilitate individual learning at a community wide level were observed frequently; however, as noted previously, these activities are not formalised in any way and follow-up investigations revealed that the catalyst behind these activities was rarely formalised or strategic: *"I just do it, I don't think about it in terms of my role in* [the ELC]. *It's more of a community aspect. The training could be under their nose and they wouldn't know about it,* [the Local Government Support Agency] *said that if they got the numbers they would provide the training and I didn't want to have to travel in to* [neighbouring town] *to do the training, so I just wanted to make everyone aware of it"* (P8). This may come as no surprise given the well cited preference for informal learning strategies in micro-firms (Birdthistle, 2006; Rice and Hamilton, 1979) and these findings reinforce the importance of more robust learning strategies to sustain learning communities over time (as noted by Morris et al., 2006).

7.5.8   Learning broker development

There is evidence that brokers apply prior learning from the FLN in the ELC. For example, P1 explained how the core group had used what they had learned from the FLN in many of the group's activities. P1 detailed some examples of PR activities that she had carried out on behalf of the group, P1 also referred to *"keeping up links* [with] *the* [FLN] *programme team and using their website to gather learning material that could assist the group"*. When re-structuring the ELC, different options were discussed. Some members wanted to *"group people according to their expertise e.g. water based activities, accommodation, pubs & restaurants, The Islands and everything else"*, (Email: P10 - ELC). Others, stronger in the broker role, disagreed with this approach and suggested: *"(The word divide in a co-op may be wrong to use) ... I wish to suggest another way in which we could perhaps* <u>*encourage membership participation*</u> *... members ...* <u>*choose a specific area they would like to work in.*</u> *From the response an individual from each group would be asked to* <u>*facilitate a discussion group.*</u> *They could* <u>*share out any suggestions arising*</u> *from their discussions ...relevant facilitator could share the objectives of their group for discussion and approval* [at community level]*"*

(P8). This discussion demonstrates learning development, as P8 recognises the benefit of a facilitated approach that could ensure that practice and learning at sub-group level were visible at community level. This approach could also develop individual role capabilities in the ELC, providing for a succession path in terms of future learning brokers and chairpersons.

Evidence suggests that 'learned helplessness' can prevail in the ELC, much like in the FLN (Kelliher and Reinl, 2011) and in such instances where the broker takes a step back (for example in the crisis) learner autonomy increases. To reiterate, due to the unique constraints which impact on the learning process outside of the network environment, the learner can become reliant on the facilitated supports of the learning network and ownership of the learning process may not be assumed. While certain learning structures in FLNs act as learning enablers, other supports can reinforce behaviour such as learned helplessness, which is counter-productive to individual and collective learning. Considering the FLN objective is ultimately learner autonomy, TLN facilitators need to find an optimum intervention level where the balance between learning broker reliance and autonomous learning can be maintained (Reinl and Kelliher, 2010), in order to minimise the risk of learned helplessness in these networks. If this occurs, the learning momentum may be lost as soon as the facilitation ends.

The findings also demonstrate that two issues are prevalent; firstly workloads require management (particularly those of core members and experts that are critical to ELC success); secondly roles and responsibilities require clarification to counteract non-activity as a result of role confusion and perceived inequities among active members. These findings further support the need for succession planning in this setting.

7.6 Learning relationships

Relationships in the ELC are interdependent and shaped by their voluntary nature. Learner identity influences the nature and type of interaction within these relationships and the learning impact varies at different levels of interaction (peer to peer; sub-group and community level).

7.6.1 Voluntarism and interdependence

The successful practice of the ELC depends on the input and involvement of its collective members. This interdependence is set in a voluntary learning setting and these characteristics of ELC relationships require a delicate balance of management and autonomy from a learning perspective (Candy, 1987; Jõgi and Karu, 2004; Kelliher and Reinl, 2011; Sadler-Smith et al., 2000).

During the case study period, one of the group's key activities was the development of a website that would generate increased business and number of tourists to the ELC location. The web-site sub-committee was dedicated to this task; the committee comprised P9, P7 and P20. The website sub-committee liaised with ELC members and external experts to achieve this goal. Much of the work that the active members carry out requires additional input/ activity from those that are less actively involved, as the following quote demonstrates: *"A huge thank you to* [P9] *and* [P14] *in dealing with* [the web-site development company] *to get the new website up and running. It still requires details/images from members for their entries please send pictures to* [web address]" (Email/meeting minutes: P1[Chairperson] – ELC). This interdependency features throughout the ELC's activities. In the case of the website, when members failed to send on the missing images after the stated deadline had passed, the issue was raised again at the next ELC meeting. Members of the website sub-committee expressed their frustration and disappointment that the images had not been forthcoming, as P9 complained: '*all they had to do was send on a picture, you would think that they would*

be eager to have an image of their business on the website'. After a lengthy discussion, the decision was taken to '*switch off'* businesses that had no images on the web page; this was communicated to the members via email. Many of the active members present expressed their disappointment and reluctance to have to take such measures to get people to participate, being aware that ELC participation '*is voluntary after all'* (P1 and P9). After a time, P9 reported that many of the members had sent on the missing images.

Active members recognise that the ELC is more than just a marketing group and a website that requires little involvement and engagement. They recognise that the success of the group is dependent on the wider ELC community working together. The initial evidence suggests that active members are having difficulty establishing full inclusion, P10 communicated these sentiments to the group: "*The things that set* [the ELC location] *apart as a tourist destination are not just the fine B&B and hotel accommodation, high class eating establishments and world class activities on offer. It is the RANGE of accommodation, eating establishments and activities to suit all tastes and wallets. It is also the way in which we all interact and actively work together to generate business with packages, discount deals and passing business to one another. In my opinion that is the success of* [the ELC location] *over many other tourist destinations in* [the region]. *...Building on the success of* [the ELC] *I believe we have the opportunity to make* [the ELC location] *THE tourist destination of the* [region] *but it will take effort. IF WE DON'T MAKE THIS EFFORT NOW WE ARE THROWING AWAY AN ENORMOUS OPPORTUNITY"* (Email: P10 - ELC). Many email communications (similar in tone) followed and further reinforced P10's sentiments. Comparable opinions were echoed by many members at the AGM and at the crisis meetings that followed. Directly following these discussions, there was a marked increase in attendance at ELC meetings and a small number of previously non/less-active members volunteered for roles and tasks (see exhibit 7.3, p. 183).

Dependency on the collective for business development and survival is a strong feature in the ELC and one that is common in a tourism setting, even for businesses that

directly compete with one other. Efforts to bundle the products and services of ELC members are commonplace and these activities are planned as individuals meet and discuss upcoming events and opportunities: *"I'm part of the* [regional] *garden trail we are doing hopefully a weekend with seminars and plant sale at* [P7's gardens]" (P7). There is consensus among the active members that '*the rising tide lifts all boats*' (P2). The trustful relationships between active members are not mirrored by those that assume a non-involved/ spectator role in the ELC. Although they attend the odd meeting or volunteer to find out information from time to time, these are isolated occurrences. Observations confirm that it takes time to build trustful learning relationships

7.6.2 Relationship type and value

Willingness to share individual knowledge and resources is prevalent among the active members of the ELC. In contrast, there are a number of individuals that are members in name only (non-involved/ spectators) and these individuals have weak learning relationships with active members. Interestingly, observations suggest that at times those that are less involved in the ELC's core activities maintain enough distance to provide an outside in perspective that is beneficial to the whole community. This was particularly evident in terms of nurturing learning relationships between the ELC and group B. Intermittent members and experts also add value to the ELC, even though they often have very limited or no involvement at all in the community's tangible activities (festival organisation and the website development). The intermittent expert builds relationships with external groups and individuals and maintains a close relationship with the broker and core members who value these intermittent contributions; however observations and interviews suggest that not all active members place value on this type of involvement. Notably, in most instances these members are not former FLN members and they may not have previous experience of such expert / intermittent involvement.

In the main, active members are grouped by activity (for example the festival sub-committee), they frequently exchange time, skills, ideas, information and contacts; they value this activity and they value relationships in the ELC that mirror (for example other sub-committees) or support that activity (for example volunteers for the festival). The collaborative activity in the sub-committees' strengthen the relationships within. Higher level learning behaviours such as ELC strategy or idea-generation are not perceived as being that valuable by activity focused members. During the case research, it became apparent that learning began to reside at sub-group level. As such, the learning broker needs to work to maintain a community wide learning emphasis to retain learning at the community level.

The broker maintains relationships that facilitate learning and provide opportunities for further practice for the ELC. In pursuit of this aim, they nurture a variety of collaborative relationships with internal and external ELC stakeholders. Brokers encourage and value the engagement of active members. They also understand the importance of the intermittent expert's contribution. At the same time, they appreciate the need to inject "*new blood and fresh ideas*" (P1) into the ELC. The broker promotes the engagement of less active members, and this was evident in this case research, even where political tensions existed between certain individuals and the broker.

7.6.3 External relationships

ELC members also interact with tourism community group B on a frequent basis. The ELC "*...has members from both camps*" (P9) and the ELC location website is co-owned by the groups. Levels of involvement for those that are members of both groups vary, but the majority of group B members are non-active in the ELC. A few are active in both groups, such as P9, but few are core to the ELC with the exception of P9 and P10 (whose involvement is only apparent since the post-crisis restructuring of the ELC). Efforts are made to include non-active members, but it takes time to build trustful relationships. Approaching the final phase of the case research, there were indications that these relationships were showing signs of development.

ELC members maintain a variety of other external relationships that provide opportunities and support for further practice and learning (Table 7.6 below).

Table 7.6: External relationship types

Group	Nature of learning relationship
PR/media groups	Raise the ELC profile; encourage tourists to the area
Specialist tourism groups	Provide opportunities that enable practice
Community tourism group B	Elements of conflict, negotiation & conflict shape practice
Experts: for example the website developer; Insurance broker	Provide specialist information
Regional business support agency	Provide information & resources that enable learning & practice
National & regional tourism support agency	Provide information & resources that enable learning & practice
Community education	Provide learning opportunities
Others community stakeholders: for example, the local historian	Relationship and dialogue is a requirement of practice

In some of these relationships learning is the primary goal, in others this is not the case. This process of relationship building and maintenance permits the ELC to evolve. The group often reach out to experts and agents in the external environment. For example, concerns were raised at a meeting in relation to the legal requirements governing the group's collective practice. One of the members consulted a legal expert and brought back an update for the community members, as a result the following information was distributed in the meeting minutes: "*P20 obtained a quotation from* [an insurance broker] *to cover 8 festivals in* [the ELC] *for €2600 ... As part of the Heritage Festival please note that all activity providers need to indemnify* [the ELC] *and the Heritage Festival group on their own insurance cover.* [Group ELC] *cover is both for the Heritage and the spring walking weekend (the autumn walk is covered by the Irish Heart Foundation). Although we don't make enough money on each festival, we need to know that liability for our marketing activities ... does not leave anyone exposed to a*

possible claim" (Email: P1: Chairperson- ELC). In turn, this expert knowledge influences practice.

There is evidence that some external relationships are maintained at an individual level only, despite their potential value at community level. P5 described how she utilised a regional on-line education campus to target a regional market for her tourism business, as she explained: "*The first year we did* [grow your own vegetables courses] *we had 60 odd people over 5 weekends, last year we didn't have as many so this year we are trying it slightly differently and we've now sent this* [free half-day grow your own vegetables course] *to* [an online- regional learning campus] *...they bring together courses and seminars on all sorts of things, so he* [the on-line campus administrator] *has emailed this out to 500 people...we hope to get local people who normally wouldn't want to pay €60 for a day but would love to learn a bit more and maybe they pay for their lunch and then have one in January, how to grow salads all the year around, and it's only an afternoon course and it's €30"* (P1). Throughout the interviews there were many accounts of individual business strategies but there was no evidence to suggest that these are incorporated into a community wide strategy. In reality, limited resources and competing tasks mean that every good idea cannot be brought to fruition. Pre-dominantly ELC efforts focus on previously agreed activities such as the festivals and the development of the website. Experience sharing at a community level is a pull system in the main, dependent on the broker recognising the value of such activity. Decisions to showcase best practice and experience emanate from the broker and given the time constraints in this setting, there is little room for unplanned contributions. Individual business strategies and experience are showcased in the FLN setting and they permit members to learn from one another, their value may be overlooked in a resource constrained environment such as the ELC (Kelliher and Reinl, 2009; Sullivan, 2000).

7.6.4 Action dynamic

External relationships create a resource impact and information flow into and out of the ELC, and in the majority of instances this prompts action. In turn, this action provides the catalyst for further learning events. To illustrate this point, the regional business development body provide funding to the ELC for the development of tourism brochures. In return, this body wants statistical reports to demonstrate that the brochures have resulted in increased business and job creation in the area. This interaction creates a learning dynamic both within and outside of the ELC. As a result, the group must discuss, plan and design the brochures and the customer feedback form, and report the findings, circulating activity throughout the ELC and beyond.

7.6.5 Relationship dynamics and development

The ELC maintain a relationship with group B. As some ELC members explained: "*they do things differently to us*" (P1 and P5). Others felt that the tension between the two groups was "*a bit silly*" but explained "*that's just the way that it's grown up... sometimes you get a slight bit of friction between the two...which we could do without really, but anyway that's small village life for you*" (P9). In general, there was acknowledgement that although "*there is a bit of a standoff between the two groups... [we] have to work together*" (P5), and as P5 conceded: "*I think that we just have to keep our heads knocking together*". Informal conversations with several of the active members confirmed the "*... need to be diplomatic*" (P3) in a village setting. There is evidence to suggest that the source of tension between the groups may be political and conflicting relations are more pronounced between particular members, as P3 commented, "*... people say that* [some members of group B] *are difficult to deal with but I don't think that's the case*". This adds to the complexity of these relationships, and personal differences make it more difficult to forge collaborative learning relationships. Nevertheless, there is evidence that these issues can be overcome when members of the wider community are committed to working together as exhibit 7.6 overleaf illustrates.

Exhibit 7.6: The website
Originally there was one website for the ELC location established by the local council and managed by group B. When the ELC was established the group felt that although the website looked very nice, it didn't function as a generator for business: *"it's very much a notice board so therefore it doesn't have the commercial element to it, which is what we need and that why we decided in* [the ELC] *that we needed to make it come up in the Google search engines, we need it to drive business to the individual members, some members might not have their own website so it needs to function for them, ... we needed the approval of the community council because they really own it, it is in essence a community website, and it was managed by group B"* (P1).   The ELC members went on to set up their own website. It had a visible identity providing a detailed description of the ELC group and its rationale as follows: "[the ELC location] *is a marketing cooperative of over 95 companies servicing the tourist industry in* [the ELC location] *and the surrounding area and Islands. Made up of accommodation providers, restaurants and activity providers ...and leading the way in tourism innovation in* [a region of Ireland]*"* (Source: statement taken directly from ELC website).   During an interview, P9 revealed that having two websites in the beginning did not help his task to develop the website and he stated that the group were: *"back to square one on the issue, with two separate organisations* [the ELC and group B] *with one website, working together, with the same aim of promoting tourism"*. It seems to have taken the creation of a separate website and identity for the ELC members to gain influence over the now co-managed website. The ELC's concession for this closer relationship with group B is that the website says nothing about the ELC (only the logo remains); however the website is now a learning symbol that encapsulates and reflects the collective ethos of the ELC.

7.6.6   Shared meaning

A number of measures were taken to embed the rationale for the ELC among all stakeholders. At the AGM, the chairperson (P1) reminded the others that: *"Our aim is to increase tourism in the area and learn about each other's business"*. Individuals realised that ELC members have divergent business motivations and P9 acknowledged the impact of this on the group's activity (section 7.3.1.1, p. 165). Although the majority

of members want the area to do better by increasing tourism to the ELC location and the surrounding areas, the way that individuals set about achieving that goal differs:

- Both P1 and P5 want to extend the tourism season with festivals, and they align themselves with that practice;
- At the AGM, P8 reminded members what the ELC had started as '*a marketing group*' and suggested that they put their future efforts into marketing and not organising festivals;
- P9 expressed that he was '*not convinced that* [the festivals] *were bringing in additional tourists that wouldn't be visiting anyway*'.

Other comments and observations suggest that the festival focus is partially to blame for the tension that exists between the ELC and group B (who managed the other existing festivals). P12 is not involved in the festivals but his presence at the adventure summit promoting the ELC location, and his update on the next trends in tourism (exhibit 7.4, p. 186) feed into the idea generation process in the ELC.

In the initial phase of the case research, the evidence seemed to suggest that shared meaning was strongest between the core members and where relationships were weaker, shared meaning diminished. However there were some observations that contradicted this initial assumption over the duration of the case. As evidenced above, even among the core members grouped in sub-committees, there is not always consensus that reflects shared meaning. P3 has a very different view of what the group is about than P1 and P5 do, although they are all part of the festival sub-committee. Finally, where shared meaning does not exist, it is reasonable to assume that individuals will be unaware of what the ELC relationship entails.

According to the literature where agreement about meaning does not exist, meaning must be negotiated (Lave and Wenger, 1991). The literature also suggests that by moving through this process, there is eventually consensus that allows the group to continue (Lave and Wenger, 1991; Wenger, 1998). The findings in this study suggest

that the ELC benefits from a degree of divergence in meaning, as individuals choose different roles and tasks that permit the group to forge a way forward, but this requires a community level strategy or practice begins to reside at sub-group level and relations between the various groups can weaken over time as a result.

7.6.7 Power

Considering the overall aim of this research (section 1.2, p. 5), a key consideration in the context of power dynamics is: *How is the power to design, adapt and interpret the learning architecture distributed in the ELC and what is the influence of this on individual learning?* P1 and the initial core group (P4, P2, P8, P5 and P1) established the ELC in 2006 and subsequently drove it forward. During that time P1 and most members of the initial group had dominant roles. Although there was a danger that the core group could become 'insular' as Wenger (1998) described, core members actively sought the engagement of less involved and new members throughout the case study period. Dominant members acknowledged that new members with fresh ideas would be good for the group in the longer term. P9's comment is interesting in the context of power dynamics, he explained that the ELC, *"doesn't benefit everyone equally"* adding that: *"the group is predominantly made up of accommodation providers"*. It could be gleaned from this comment that ELC efforts were directed to benefit one business type. The stronger members of the initial core group (P4, P2, P8 and P1) all happen to be accommodation providers, but the voluntary move to a more inclusive structure suggests that P9's opinion may be misplaced. The actions of the core group demonstrate a maturity in terms of their learning development. Even so, the findings confirm that increased power comes with certain roles and identities in this voluntary ELC setting (as acknowledged previously by Wenger (1998) and others).

7.6.8 Psychological contract

The psychological contract between ELC members is not influenced by formal relationship agreements as is the case in large organisations with employment contacts. Despite the voluntary nature of ELC engagement, members do agree to enter into a relationship where they agree to engage in practice together, and these relationships are based on trust. ELC relationships entail expectations that are in the main implicit, as P1 explained: "*it was about everyone getting involved and sharing the workload among the members and people joining up and taking a back seat*".

At times active members wanted to be involved in the ELC but expressed their feelings that other less active members should contribute more (see exhibit 7.3, p. 176). For example, P3 accepted that although the ELC is voluntary all members "*should all be pulling on the same string*". Observations suggest that inequity in effort and commitment is accepted to a degree in the ELC and "*it's to be expected*" (P9). According to (P1) "*it's difficult when* [ELC participation] *is voluntary*". This perspective and resultant approach to coordinating people and work, overlooks the influence that these inequities have on those members who take up the slack. Opinions expressed frequently during interviews and meetings validate the observation that active members were "*disappointed that* [ELC practice] *took up so much of* [their] *time*", explaining that they had "*certainly learned about people's attitude towards it*" (P9). Many felt that they had "*done* [their] *share...* [and] *others should carry their share of the workload*" (P3) and that it would be "*good for* [others] *to take responsibility*" for tasks. Some members (specifically P1 and P9) took a step back from ELC activities as a result of being over-burdened with tasks. Although the ELC is voluntary, the findings suggest that boundaries need to be placed around roles, work load and expectations. A variety of non-verbal cues further supported this finding.

A number of communications (at meetings and via email correspondence) made expectations very clear that it was expected that "*people* [should] *come along and try and _involve_ themselves*" (P10) and "*if members are unable to attend that they would at least let* [the chairperson] *know what their own thoughts are on the methods offered, and which area they would like to get involved with*" (P8). Over time, the content of these communications became increasing direct as reflected in the language and sentiment in the correspondence. At other times, there were expectations regarding the effort of active members in various aspects of practice. P1 explained that support was there for the festival management as "[she] *had everything done you know*". When the walking festival was not as successful as previous years, P1 was visibly disappointed that members did not follow through on the success of the previous year's event in her absence.

7.6.9 Sense of community responsibility

The case evidence demonstrates that individual motivations and expectations stretch beyond the boundaries of the ELC, and are formed in the wider community (the ELC location) as illustrated exhibit 7.7 below.

Exhibit 7.7: A good community project

P9 is unsure what the ELC is about. For him it is "*a good community project*" that he feels he should contribute to as part of his "*civic duty*". This opinion is formed in the absence of a clear aim and strategy being outlined to ELC members on the establishment of the ELC. For P9, the ELC and group B have the same aim, which is "*to promote tourism*". Because P9 does not fully understand the collective learning ethos of the ELC, he perceives the negotiations and tensions between the groups as being "*not very helpful*" and attributes the tension to "*small community politics*". What he misses is the importance of that process of negotiation to the development of learning relationships and the evolution of practice in the ELC.

Of note, expectations will be informed by individual perceptions of the overall aim/strategy of the group. When asked what that aim is, some explain that it is *"...to*

increase tourism in the area and learn about each other's businesses" (Email/ ELC meeting minutes: P1 Outgoing Chairperson – ELC) but the response differs depending on who is answering the question. This further demonstrates the absence of shared meaning in at community level in the ELC. It follows, that expectations will differ and the psychological contract will be damaged as a result. This impedes on the sustainability of the group over time, as it bleeds in to other aspects of the learning relationship and resultant practice and learning.

7.6.10 Histories of learning

Finally, in considering ELC relationships, the history of learning that former FLN members collectively shared must be considered. The following example illustrates the influence of shared history on individual learning in the ELC (Exhibit 7.8).

Exhibit 7.8: The rising tide lifts _all_ boats?

The initial FLN alumni group were the catalyst for the formation of the ELC, as P5 explained "*initially it was that hard core of* [P4, P8], *myself,* [P1 and P2] ... *that sort of said this is ridiculous why don't we involve the whole village*". The core group had an established history of learning in the FLN and they carried an ethos of collaborative learning and practice that took time to build in the FLN setting into the ELC environment.

During interviews one member reported that group B did not understand what they (the core group that set-up the ELC) were trying to do. Reflecting back on that first meeting, P5 remarked: "*Maybe we could have embraced* [group B] ... *maybe there could have been less sort of comparing ... maybe more co-operation. I don't know ...but it's very hard to force things as well you know, it can only go so many steps at a time*" (P5). While there is acknowledgment that building the relationship will take time, the core group may underestimate the indirect impact that the 'shared history of learning' has on learning and practice in the wider ELC.

From time to time in the ELC, old FLN resources are re-used. While P3 did not understand the health and safety template initially, it was familiar to the rest of the core group (as illustrated in section 7.3.1.1 and table 7.4). P9, by his own admission, does not really understand the aim of the ELC. (***Continued overleaf***)

The collaborative ethos that underpinned the FLN is understood by former FLN members, they believe that '*the rising tide lifts all boats*' (P2), while others feel they have little to learn from the group, as they have been '*in this kind of business for a very long time, possibly longer than anyone else in the group* [and] *feel rightly or wrongly, I may be wrong..., that I know most of the ins and outs of it by now although things change*'. Former FLN members can relate to this viewpoint and admit in hindsight that FLN membership '*has certainly changed the way we do business*' (P2) and many confessed that they had never worked closely together before then, despite the proximity of their businesses.

While members may share histories of learning from other experiences outside of the FLN, these were not explicit in the case findings and although they may influence learning in the ELC, they are outside the remit of this research.

7.7   Learning development

The learning development of ELC members is evident in the establishment and management of the ELC, and in its subsequent evolution. The ELC provides the context for members to develop a wide range of skills and competences, although it must be noted that this section focuses specifically on learning competence. There are a number of observable learning skills, attributes and behaviours that demonstrate effectiveness in the learning role and these are discussed next.

7.7.1   Ability to leverage resources for learning

Activities associated with leveraging resources for learning were observed regularly during the case study. Members invited external experts to speak to ELC members, identified training opportunities, recognised the need to support the learning of other ELC members, and nurtured internal and external relationships that enabled ELC practice and learning. While there is abundant evidence that ELC members reach out to the external environment for advice in relation to collaborative practice, a number of

remarks during individual interviews suggest that the internal resources of the group are rarely leveraged to resolve individual business problems. As P5 explained when asked if she took advice from others in the ELC: "*maybe not enough ... but with things like that* [obtaining a drink/food license] *I should take advice*". Observations over the duration of the case study further support this finding.

7.7.2 Mapping skills and closing knowledge gaps

While ELC members were somewhat aware of their individual abilities and limitations; knowledge, skills and abilities were not mapped in any strategic way at a community wide level. Although the sub-committees were assembled '*based on expertise*' (P1), it was generally the case that attempts to map skills were conducted as the need arose. Alongside emerging requests for skills; informal conversations and formal introductions served to raise awareness of individual skills in the wider community. Despite these efforts, many members are still unclear about what the different ELC roles and tasks involve, and several members mentioned that it would be easier to get people involved '*if there were guidelines and templates to follow*' (P26). This suggests the requirement for stronger supporting structures in this context.

In terms of closing knowledge gaps, there were infrequent instances where individuals decided to provide tutorials/demonstrations at a community level (exhibit 7.9 below).

Exhibit 7.9: The demonstration

The AGM was held in P2's hotel meeting room. There were about thirty members in attendance. P9 had set up a laptop, projector and screen at the back of the room prior to the meeting. P1 entered the room asking the others "*what's this about?*", and looking surprised at the set-up. P2 explained that P9 had arrived earlier in the day to organise the tutorial, and he was going to demonstrate the new website at the AGM.

After everyone had arrived P9 began the website demonstration, drawing people's attention to the business listings page, and pointing out that some businesses listed were missing information and images. P9 explained how important it was that all the listings had these details. ***(Continued overleaf)***

Members commented on how well the website looked now. One or two people asked if the images needed to be in a particular format. P9 explained that they needed to be JPEG images of a certain PPI (pixels per inch) quality. P6 began a quiet discussion with P27 at the back of the meeting room about signing up for a local beginners computer class. P6 reassured P27 that she "*hadn't a clue about computers either*".

Noting the confusion of others in the group, P6 mentioned to the chairperson that it might be a good time to mention the IT training classes for beginners that the local business development support group were providing. P1 replied "*that's later on the agenda*".

P10 addressed the group next, stating that he was unsure if people really understood the way the special offers feature could be used, and the way that it would appear to customers. P10 asked P9 if he could show people around that section of the website. P9 explained and demonstrated the special offers and announcements functions; he reinforced the need to include dates in this section and reassured everyone that "*when finished, it will need little human interaction*".

P9 spoke using language such as "*content management systems*" and "*maximum character capacity*". It was evident from facial expressions and aside comments that many members seemed uncomfortable with the technological aspects of the website and required activity.

P10 spoke next about the ELC location blog, explaining that it would feature stories, promotions, events and ideas, and remarked that "*the community will effectively know what everyone else is promoting and offering*". P10 reminded people that the content should be "*newsy*" and should be proof-read before submission. When they (P9 and P10) had finished, P1 thanked them both for the demonstration and all their hard work on the website, and the meeting moved on to the next agenda item.

In the case example above, it is evident that P9 moved from providing expert knowledge as an active member, to taking on aspects associated with the learning broker role. It must be noted that this action was primarily driven by the need to get other community members to complete certain tasks that would enable the development and effectiveness of the website. Although the ability of individuals to identify skill/ knowledge gaps showed signs of development over time, further probing revealed the underlying motivations behind these actions. P9 revealed that: "*It seemed natural to do. I can't remember exactly how it came about. A few of us discussed it, there seemed to be a lot of people that were a bit hazy about the website and what was involved... I can't recall exactly how the process happened ... I didn't think about* [deciding to provide the demonstration] *really, I just did it*". This suggests that in the main, this approach is problem driven and has an action outcome emphasis rather than a learning emphasis. In essence, it equates to a single loop learning cycle (Argyris, 1977). This approach is

hardly surprising in this micro-firm dominated setting, but it overlooks important aspects of learning support. P9 is very aware of his role as website developer/ manager, but does not think about his role in a learning capacity. Observations in the later stages of the case study verify that over time, P9 appreciated the value of a supportive approach explaining with satisfaction that "*it* [providing the demonstration] *did work, yes*".

Throughout the case study period, there were several instances where individuals offered to "*show* [their peers] *the ropes*" (P1) but the ELC lacks a robust structure to facilitate this type of training. There was also evidence of learning development over time, as members moved from merely suggesting training: *"I've said that I will come and sit with* [P5] *and show her what to do"* (P1) that rarely came to fruition; to more supportive attempts where details of the role or task and assurances about training were provided: "[P9] *asked for anyone interested in taking over the running of the Photo Gallery on the website to let him know. This would involve sourcing images and updating the webpage, (instruction will be provided*)" (Email P1: chairperson- ELC). Following this appeal someone did step forward and training was arranged.

When P1 stepped aside there was a requirement for the core members to implement a plan of succession (Exhibit 7.10).

Exhibit 7.10: Replacing P1

In October of 2010, P1 formally stepped down from her role in the ELC. After many weeks of notification that this was happening, members were still unprepared for the period that was referred to as *"the crisis"* (P2) and *"the impasse"* (P10). Frequent discussions centred on trying to forge a way forward for the group.

(Continued overleaf)

People recognised that P1 had carried a considerable workload on the ELC's behalf, as P9 stated, "*We have been spoilt this past three years by* [P1] *and her team so effectively running* [the ELC] *for us all, liaising with all the outside bodies like Fáilte Ireland, implementing marketing strategy, getting the brochure written and printed...and much more. As we take* [the ELC] *into the next decade we don't have that luxury and will have to take on much of the responsibility ourselves and become more involved in the running and planning... the alternative of course is to let* [the ELC] *fold and go back to doing our own thing"*(P10). Following many similar comments, a number of members reflected on the influence that a dominant co-ordinator had on the ELC.

P3 voiced her concern about "*one person taking on more and more* [of the workload]*",* explaining, "*I did raise this as a concern going back months ago*". On a separate occasion, P13 concurred with P3's point and cautioned that "*if a group didn't form quickly*" he feared that all the good work to date would be lost, adding that from his experience serving on committees: "*that's what happens* [when] *more active members decide to step down*". Members also admitted that "*it was easy for people to take a back seat while* [P1] *carried out so much of the work*" (P10).

For a short time following P1's resignation, the members were lost and unsure how to move forward. Having established that members wanted the group to continue over the course of several meetings, active members began to engage in discussions about sourcing an ELC secretary (a role formerly carried out by P1) through a FÁS work placement scheme[21]. A number of members sourced information about various work placement schemes from external experts.

P1 remarked that "*it's an excellent idea and a great opportunity for a graduate,* [but] *there is criteria and* [P7] *has been doing quite a bit of work on that*". She speculated whether or not members would be prepared to pay for a secretary. Active members engaged in many informal conversations about what the new role would entail.

(Continued overleaf)

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[21] The FÁS Work Placement Programme is an Irish Government supported programme that brings employers and the unemployed together for a work experience placement. Employers benefit from having someone contribute to their business, whilst also enhancing the skills and career prospects of the individual. The Community Employment (CE) programme and graduate placement schemes are administered by FÁS, Ireland's training and employment authority and are designed to help people who are long-term unemployed to get back to work by offering part-time and temporary placements in jobs based within local communities.

During this time, they recognised that certain aspects of P1's role were very important and arrived at the conclusion that: "*ideally* [they] *should have someone that will have good knowledge about tourism,* [the ELC] *and what's happening in the locality*" (P7), in addition to having the skill required to carry out the more mundane aspects of the role (such as taking the meeting minutes). Eventually, the members adopted a rotating chairperson structure (see Table 7.4, p.182), assigned a volunteer member to take the meeting minutes and P8 volunteered to take on the role of liaising with Fáilte Ireland on the ELC's behalf.

Skill deficits and issues of non-participation added to the complexity of succession planning in the ELC. After P1 stepped down, members seemed lost and were reluctant to take over the role (perhaps this is due in part to the multi-faceted nature of P1's role as outlined in section 7.5 (p. 186). A number of comments at the initial meeting conveyed concerns about taking over the role. Anxiously P15 asked: "*Will you hand over the folder?*" referring to P1's ELC reference folder. Members were asked who would volunteer for the role. After a lengthy silence, P3 explained that she could not send out the meeting minutes, declaring: "*I don't have that group email thing set up*". P3 explained later that she was prepared to step in if the ELC was likely to fall apart. Other similar comments suggest that these declarations may be a reflection of individual member's reluctance to become more involved in the ELC.

Over time, as people step out of the ELC and move on, others take over their roles. As reported in the meeting minutes: "*The following were willing to steer the group for the next year* (2011) *but roles within have yet to be decided:* [P3, P10, P5, P6, P28 and P15]". A number of new members joined the ELC over the duration of the case (namely P11, P37, P38 and P39). They were introduced at meetings and via email: "*Welcome to* [P37 & P38] *who have joined the group with* [their business name and type] *and congratulations on their new venture.   Contact number* [xxxx] *and email* [info@xxxxxx.ie]" (Email: P1: Chairperson- ELC). Despite many attempts at inclusion, the evidence suggests that the new members did not get very involved in the community since they joined. Observations suggest that it is difficult for newcomers to volunteer to take on roles when they do not fully understand what the ELC is about and what those

roles entail. From a learning development perspective, core members need to be aware that greater learning support is required in the early stages of the newcomer's involvement. Underpinning a collaborative learning ethos at this juncture is important to the long term sustainability of the group.

Exhibits 7.3 (p. 176) and 7.10 (p. 211) demonstrate that succession planning occurs in the ELC, although it is carried out in an impromptu fashion. Community level planning is required to counteract the potential knowledge drain from the ELC as members leave, or move on to participate in other projects within the ELC. The literature demonstrates that informal, intuitive planning is common in the micro-firm context (Rice and Hamilton, 1979), and it works there to an extent. However, managing a learning community of the ELC's size requires a more robust learning infrastructure to ensure sustainability. Nonetheless, lessons were learned from the crisis, and the evolved structure demonstrates the group's learning development over this time.

7.7.3   Addressing the reflective balance

The ELC provides a setting where reflection can occur away from the pressures of the micro-firm business, as P5 confirmed: "*you've got to have that head space to keep thinking of things all the time, of what you can do to bring more people in, but when half your head is when are we going to pay this, when are we going to pay that, it's* [difficult]". Members frequently reflect on ELC practice at an individual level: "*The little farmers market this year - it was good but it needs improvement; the walking festival was a disaster compared to last year ... possibly because* [P1] *wasn't there ... we didn't do enough advertising, we're just offering the same as last year with the couple of tweaks. You know although we've got these festivals, we've really got to work hard to think* [outside the box]*"* (P5). For individual reflection to be of real value in the ELC it must be voiced at community level and time must be permitted for members to engage in a process of group reflection and dialogue. The success of such an approach would rely on ELC members valuing and engaging with the experience of their peers, and the process of reflection.

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ELC members regularly reflect on different elements of practice at sub-group level with sub-committee meetings and other informal interactions providing the context for reflection. Here, individuals discuss "*what did we do well last year and what didn't work so well*" (P1- Festival sub-committee). P9 explained that "[the website sub-committee] *brainstorm...*" at meetings. The sub-group structure is similar in some aspects to the learning sets in the FLN setting. While the structure of the sub-groups is necessary (due to the workload and resource constraints in the ELC setting); lacking a cohesive community level learning emphasis, the sub-group structure fuels an already problematic action bias and influences individual learning development and a short term focus in the ELC. It is often the case that individuals in the sub-groups redefine practice, but if this is not integrated at community level, then practice begins to live in the sub-groups and eventually the sub-group becomes disjointed from the ELC. This also influences learner membership and identity within the sub-groups (as discussed in section 7.4, p. 176).

The crisis instigated community level reflection and provided a real opportunity for the establishment of shared meaning among community members as illustrated below in exhibit 7.11.

Exhibit 7.11: What <u>are</u> we about?

A number of observations over the duration of the case study confirm that consensus in relation to what the group are about does not exist. P1 explained at the AGM: "*In 2006/2007 several members attended the 2 year* [FLN] *training course and the idea sprung up to start our own "local" network group in the shape of a co-operative with the idea to promote* [the ELC location]*, increase the tourist season and have better knowledge of local tourism products or businesses in order to "up sell" each other and keep customers in the* [the ELC location] *longer*" (P1-ELC members at AGM). For other former FLN members: "***Marketing****... is the core aim and objective of our Co-operative*" (Email P8 - ELC).

(Continued overleaf)

Other active members that did not have a prior history of learning on the FLN programme expressed their confusion when asked what the ELC was about, and replied: "*I don't know, I guess I thought it was a good community project, I mean* [pause] *I don't know*" (P9).

At the AGM, P8 expressed reservations about running the festivals, pointing out that there was little return for the time and energy that goes into organising them. P8 asked the group: "*Are the festivals jeopardising the involvement of others? If the same effort and energy was put into generating fresh ideas, it's not just about money - it's putting a real effort into marketing* [the ELC]. *Our purpose to an extent is getting a presence in the media, how do you keep a media presence? ...we need fresh ideas*". Few individuals responded to this question, even though a number of other members had articulated the same reservations as P8 during individual interviews.

Only those in agreement that the festivals should remain a part of the community's key activities were vocal, replying that: "*it's better to have them for business than not to have them* (P3)". If individuals perceive that ELC practice is about festival organisation, and they do not buy-in to that activity, then they "*try to steer clear of it* [festival organisation]" (P9).

Where the group assess action (reflect) at community level, the process provides opportunities for negotiation; changing roles also lead to reflection on practice as newcomers question old ways of doing things. This process can be difficult, but it is positive for the community's development in the long term. Lacking clear objectives from the beginning of the ELC's establishment compounded the tensions that are inherent in the negotiation of meaning. Notably, the findings imply that attempts to establish buy-in in the wider community may have jeopardised the original aims of the ELC over the longer term.

7.7.4   Learning development as movement towards the centre of practice

Lave and Wenger's (1991) description of learning development as movement from the periphery to the centre of practice jars with the findings of this case research. In an organisational context, practice is neatly confined within an organisational structure wherein individuals have roles and identities. In contrast to Lave and Wenger's (1991)

findings that the newcomer wants to move to the centre of practice, many ELC members (both recent and long-term) are reluctant to get more involved in practice, and the crisis was the catalyst for increased involvement. Furthermore, those that are active members often prefer a peripheral/ intermittent role in the ELC, rather than the central role advocated by Lave and Wenger (1991).

Some newcomers to the ELC are old experts of other community groups, such as group B. They are expert at the practice of tourism business development and committee work. Old experts, such as P1, move from a very central role to a less involved position over time. Just as the learning broker needs to take a step back to encourage autonomy in the FLN setting, ELC brokers need to take a step back to encourage others to develop their involvement in the ELC. P1 recognised this, stating that: *"...it will do no harm to have fresh people with a fresh approach",* and acknowledging that: *"... perhaps I will have time for that type of activity* [supporting learning] *when I step down* [as chairperson]". The CoP literature fails to address movement that is not centripetal.

7.8   Learning resources and symbols

Applying a resource-based view to the ELC, the learning community comprises a number of tangible and intangible resources which are leveraged to facilitate learning and practice. These resources include time, financial resources and expertise, and they are discussed next.

7.8.1   Learning resources

The ELC's resource pool comprises a wide range of tangible and intangible resources that are valuable from a collaborative learning perspective, supporting the findings of Chell and Baines (2000); Devins et al. (2005); Hannon et al. (2000); and Witt (2004). In the context of this research, these can only be considered to be learning resources when they are leveraged as such. Therefore a learning resource incorporates more than the resource itself. It includes the interaction between individuals as they negotiate the meaning of the resource and apply it in practice.

ELC members frequently leverage their experience, skills, and knowledge through interactions at community, sub-group and peer to peer level using both face-to-face engagement and email correspondence. However, there is a risk that they do not see the value of community-wide learning strategies, and consider these processes to be an automatic occurrence in the ELC. The process of leveraging resources is illustrated next in exhibit 7.12:

Exhibit 7.12: The Heritage Festival

Financial resources such as the membership fee and the funding from regional development groups enable ELC members to engage in various projects that facilitate learning. ELC members hold two annual festivals to increase business and tourism in the area at off-peak season times.

(Continued overleaf)

One of these events is the Heritage Festival, which is held in April each year. The key components of the festival incorporate a play in the local community centre, a heritage trail and guided walk; and also a range of displays, stands and activities down at the harbour.

Planning and organisation for the festival begins in January and the vast majority of the meetings occur at P2's hotel; it is situated in the heart of the village. Initially the event is discussed at a general meeting where all ELC members can engage in the preliminary planning phase. All further planning and organisation is pre-dominantly the responsibility of the festival sub-committee (comprising six members). They hold several meetings to discuss what worked well at the previous year's festival and what attractions they have to offer the visiting tourist this year.

Individuals exchange ideas and make suggestions based on the availability of internal resources. P1 suggests that the group *"could display, cook and serve* [P25's] *gourmet sausages and other local produce down at the harbour"*. P5 interjects and relays a story from past experience of trying to break into/ join the local farmers market and informs the others about the health and safety regulations that govern that type of activity. As a result of this conversation, the idea to serve hot food was put on hold.

P5 mentions a connection she has with a well known Irish celebrity chef and slow food activist (that P5 had developed through her involvement in various food groups). P5 offers to ask the chef to attend and speak at the festival. At both a community and a sub-committee level, members regularly draw from their previous experience. P3 informs the group that she *"attended* [another] *festival and they had a children's farm corner, we could do that"*. P6 is given the task of enquiring if another ELC member can supply small farm animals, as P1 explains they *"meet up regularly"*.

Ideas that emerge at sub-group level are detailed in the meeting minutes to keep the wider community informed and engaged: *"The sub-committee met after the meeting to outline the programme for this year's Heritage Festival. Theme will be traditional foods, with an Antique Road show of cooking utensils and farm machinery. Hopefully* [celebrity Irish chef] *will be available for book signing of her latest* [book] *on Saturday. There will also be a kiddie's farm area where the children can have their photographs taken"* (Email: meeting minutes P1- ELC).

There were many instances where responses via email added value to emergent ideas and activities, these came mostly from active members that frequently used this form of communication. Other less frequent users of email engaged with the process at later stages, often referring back to what they had read in the meeting minutes and picking up the topic at face-to-face meetings. ***(Continued overleaf)***

The group scope out the possible activities and decide who they can allocate tasks to; reminding each other of the skills, resources and experience that various members have: "*I wonder if* (P7) *would do his classic car display again this year?"* (P3). Members agree to speak to different people to get '*the ball rolling',* this local manoeuvring is a common feature of ELC activity and, as one member explained: *"that's the way we get things done here".*

Frequently ELC members meet informally at bridge [cards], for lunch, or over a drink in the local bar and they continue to plan and organise the festival at these events. Members support emergent ideas and plan activities with tangible resources that they have at their disposal. For example, P18 brought her donkey and chicks along to the festival for the children's farm corner and P7 displayed his classic car collection. Individuals and sub-groups report back to P1 (the chairperson), who communicates developments to the wider community via email as the following extract demonstrates: *"*[P1] *agrees to check with* [P21] *for availability of the Sailing Club for the weekend.* [P15] *will check whether* [P21] *will provide sailing tours. Subject to weather* [P23] *will provide Sea Safari rides.* [P1] *to check with* [P12] *and* [P10] *for their kayaking and whale-watch tours availability.* [P24] *is happy to open up the castle for both Sat/Sun provided we have guest speakers to give it a purpose/theme".* (Email: P1- ELC). Through a process of collective reflection, decisions are taken to improve practice, members decide that: *"rather than a separate press night, we'll concentrate on the opening night making it a bigger event"* (P1). Each stage of the interaction takes practice in a new direction, and new learning opportunities, challenges and resource requirements surface as a result.

As the Heritage Festival example (exhibit 7.12 above) highlights, this process like others in the ELC is fluid and organic, but it has obvious challenges in terms of attempting to harness these activities and resultant opportunities in any kind of a community level strategy.

The resource pool comprises the experience, skill and tangible resources of its members. However, it is only through a process of interaction, engagement and dialogue that they can be leveraged as learning resources. The same principle exists at a peer to peer level. For example, P9 is a web development expert but due to cited time pressures, P9 asks someone to volunteer to manage the website gallery and offers to provide training for the task. P19 steps forward for the role and P9 shows P19 the ropes. Through this

interaction, P9's knowledge becomes a learning resource that is leveraged. Practice develops as P19 takes over the management of the gallery and P9 moves on to a different role in the ELC. Observations suggest that this type of activity is a less frequent occurrence in the ELC. This example illustrates that the learning value of the ELC resources lies beyond their mere existence, availability and accessibility. It is the process of interaction and negotiation that permits members to leverage this resource that is critical (see Figure 7.3, below).

Figure 7.3: Leveraging ELC resources
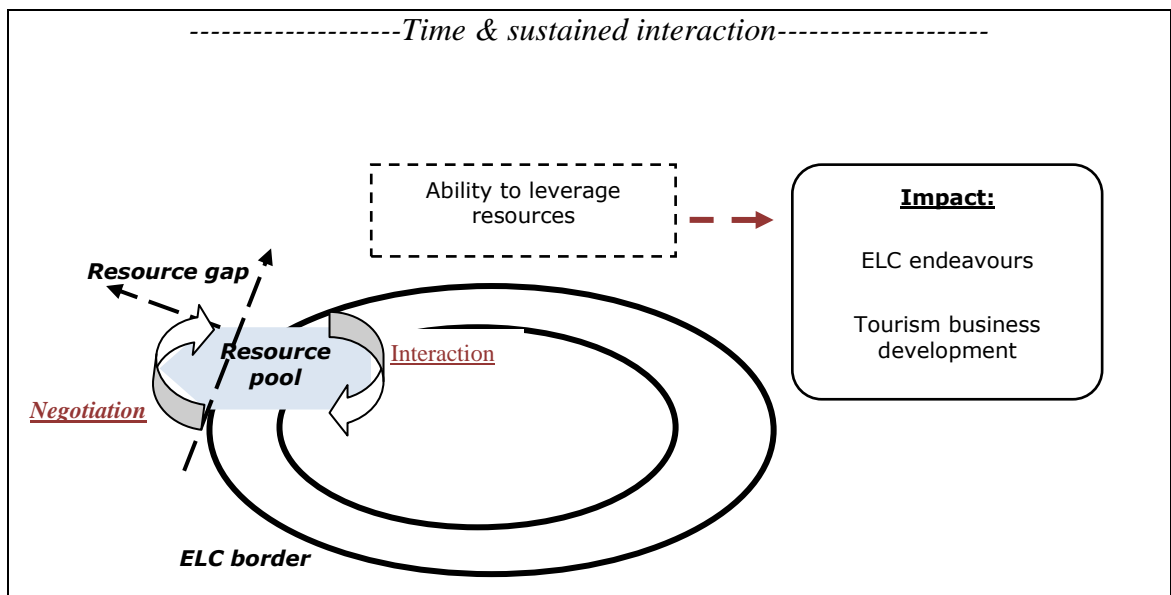
Objects of experience emerge as ELC members engage in practice, and these experiences become potential learning resources that members can share and re-use. However, there is evidence to suggest that where individuals have not been previously involved in the development or use of such resources; they do not understand their meaning, they question their purpose and they have to re-negotiate their meaning. Through a process of interaction and negotiation they learn, and practice evolves as demonstrated next in exhibit 7.13.

Exhibit 7.13: The folder

P1 is present at the first ELC meeting since she stood down as chairperson. A new chairperson has not yet been elected. During this meeting there is a sense that the group are lost. P2 announces that they "*need to get over* [the next event] *the walking festival*" and that they can sit down and negotiate a way forward for the group then.

A discussion commences about organising the walking festival and members recall what they did last year and who was responsible for what. Several members of the group suggest that they can follow the same process as last year and just "*tweak the poster and the press release*" (P3). P1 reminds the others that as the sponsorship from the walking festival goes to the Irish heart foundation (a charity organisation), they cover the liability costs, but there are health and safety requirements that must be adhered to.

P3 is confused and asks the group about health and safety requirements. P1 pulls a health and safety template from the folder that she brings to every meeting. The group members know that P1's folder contains information and resources that are used to manage the group's activities. Most of these documents have been created by P1, at times with the support of other core members. For many ELC members the folder represents what they do not know and what they do not understand. P3 picks the template up with a confused look on her face asking "*what is it?*" and she passes the template to P7 who questions its relevance asking, "*Do we need this*?" P1 and P8 go on to explain why the health and safety template is required for the walking festival and the task of making sure that regulations are adhered to at the event is assigned to P3.

Two weeks later at the walking festival, P3 greets the tourists dressed in a high-visibility jacket and asks them to sign the form, explaining the health and safety regulations governing the activity of the ELC.

7.8.2   Leveraging external resources

External resources are drafted in as practice dictates. The ELC has relationships with many external groups and individuals. Local manoeuvring is commonplace as ELC members leverage external resources including expertise, training, funding and physical resources from non-ELC individuals and groups. A number of ELC members use the community-wide e-mail to raise awareness of available or upcoming learning opportunities in the wider community: "*Attached is the information on the computer training that we spoke about. The 'Equal Skills' is for Beginners and 'I Can Do' is for Intermediate ... As advised we have had some interest from* [the ELC location] *and it*

would be good if we could locate the bus there if not we'll try and get as close as we can" (Email: Regional business development body- P1 [Chairperson]).

There is evidence of power in numbers in the previous example and collective bargaining ability as a result. At times, this releases resource constraint issues, resulting in opportunities for individuals to afford a new website page for example. Opportunities such as these could be thought of as having individual and ELC learning potential, but again they must be leveraged in order to be considered a true learning resource. These are outside of the remit of this research.

7.8.3   Resource constraints

Instances of lost resource opportunities featured tacitly in several of the individual interview accounts. In the majority of observed interactions, resource opportunities were lost because these were not perceived of as learning opportunities in the first instance. The context of these conversations coupled with observations at numerous meetings over a twelve month period, suggest that the opportunity to reflect on and discuss learning resource opportunities beyond those required to fix immediate or short-term practice requirements are not part of the ELC schedule or the learning architecture. Furthermore, the identification of learning opportunities requires a degree of learning competence (as noted previously by Wing Yan Man (2007)) that many members acting in an external facing broker capacity have not yet developed. The resource-based view (RBV) acknowledges the role of competence in leveraging small and micro-firm resources for success (Down, 1999; Greenbank, 2000; Hannon et al., 2000; Kelliher and Reinl, 2009; O'Dwyer and Ryan, 2000) but highlights a number of resource issues that may influence learning in this regard, these include time, finance and expertise.

7.8.3.1 Time as a resource

A number of comments and observations verify that time is a barrier that influences involvement in the ELC, much like Morrison and Teixeria (2004) found: "*I've had the time and tourism is at such low ebb ... there were one or two people who didn't have enough time to do it* [work on developing the website]" (P9). Many members including P15 stated that they had been too busy to upload photographs to the ELC website. Other members understand these time constraints, as P5 acknowledged: "*I know that we're all busy*" (P5); however members feel that this is not a sufficient reason for non-activity, and/or not fulfilling tasks. The time restrictions associated with micro-firm business ownership are problematic and compounded in the ELC due to the heterogeneous nature of member businesses. Attempted solutions to accommodate attendance included trying out different time schedules for meetings. Individuals did make a concerted effort to attend meetings that they thought were important, yet when meeting discussions moved on to issues that those individuals are not directly involved in, they became frustrated. At one meeting P10 reminded the group that: "*this meeting was supposed to be about the survival of the group*" and that he was "*extremely busy at this time of the day*". Apologies were frequently received from those that were absent, due to clashing timetables. In the main, these were from active members. Non-verbal signals at various meetings support the finding that time is at a premium in this environment and this constraint explains, at least in part, the requirement for the sub-committee structure in the ELC.

Efforts such as the development of the website reflect the time constrained environment. As such, it was constructed so that it would "*need little human interaction when completed*" (P9). ELC learning strategies such as the community-wide email also represent attempts to overcome resource barriers. In practice, ELC activities are planned for the shoulder tourism seasons (March and October) to increase business and revenue, but also because members have more time to devote to such activities in these quieter months. Members also contemplate the value of practice in terms of resources used (including time); for example P8 questioned: "*is* [the festival organisation] *worth the time and effort?*"

7.8.3.2 Financial resources

The group operate with limited finances gathered from ELC membership fees and various other sources of external funding and grant aid. For some members, paying the fee seemed to be an issue. The findings did not establish if this was a result of personal financial difficulties or perceptions of the value of ELC membership. Perhaps tellingly, in all cases non-paying members were also non-active members and this could be a direct symptom of non-activity.

A number of observations suggest that quick wins and tangible outcomes are valued over longer-term investments in the group's development. As P8 explained, *"The brochure and the website were a successful approach, the brochure can be re-printed and people have gotten benefit from this year's membership but after the summer it will do no harm to generate some new ideas"*. Individuals need to see substantial value for any financial investment and this was evident when the core group wondered if members would be prepared to pay a graduate to carry out the ELC secretary role.

External expertise is drafted in as required. The journalist writes the content for the website, individual's assist with the funding application, the celebrity chef opens the festival, and the local historian provides guided tours on the heritage trail. These contributions are negotiated by individual ELC members and this activity appears to be an important but unspoken aspect of ELC membership.

There is evidence that the group frequently re-use resources (exhibit 7.13). Although active ELC members engage in a range of activities that include assessing resources, *"how is the website functioning and where are we on the rankings...?"* (P9); a number of statements reflect the perspective that once certain resources are in place they need little additional interaction (as mentioned previously, P9 suggests that the web-site will require little human interaction and P3 suggests that the poster can be tweaked for the

walk). The risk is that where members cannot or do not negotiate the meaning of these resources, they become outdated, irrelevant and redundant over time as illustrated in Table 7.7, this finding concurs with Lave and Wenger's research (1991).

Table 7.7: ELC resources

Resource	Shared repertoire	Learning influence
The website	Co-owned with group B Meaning must be negotiated	The use of certain resources requires a level of skill & knowledge.
The folder	The folder is created by an individual (P1) & represents what the others do not know.	Members need to contribute to establishing or use the resources for ownership & buy-in to develop.
Templates	The health & safety template: *'What is that, why do we need it?'*	Transfer of knowledge Resources need to be visible to ELC members.
The press release	*'Look back over what we did for the press release last time and take our guide from there'.*	Resources are shared & re-used; Knowledge collection & management.

7.8.4   Learning symbols

In the FLN, learning resources and symbols were carefully crafted, with academic/professional expertise shaping their construction. Supporting learning development was the underlying goal of their creation. Over time, they became the participant's own, because they were encouraged to take ownership of them and they were informed about their rationale, structure and content. Participants got the opportunity to work on them individually and in groups, they were encouraged to negotiate their meaning. Through a process of individual and group reflection they provided feedback on them that in turn, influenced their development. As such, symbols are living objects that are reused and adapted over time as the learning community evolves.

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In the absence of facilitated supports, ELC members gather their own resources and create their own learning symbols. There were many symbols of learning in the ELC over the duration of the case; these included the ELC website, the tourism brochure, the festival poster, the customer feedback form, the health and safety template, marketing material (balloons, car stickers and re-usable cotton bags), and the funding application. These objects display the ELC logo and embody what the ELC members have learned together. Emerging symbols reflect the learning dynamic of the community, and the motivations and perspectives of those behind their creation (see exhibits for examples). These resources and symbols support learning in the ELC and assist with building shared meaning and a sense of community among learners (Lave and Wenger, 1991).

As previously acknowledged, the ELC (comprising a majority of micro-firm owner/ managers) is a resource constrained environment and the resultant action bias is reflected in many of the symbols of the community. While the literature suggests that ideally symbols are supposed to embody shared meaning, they frequently reflect the perspectives of the core members that have actively contributed to their meaning. Reflection and negotiation also occur when individuals interact with a resource for the first time and negotiate its meaning. In turn, this interaction transforms the resource into a symbol, as was the case during and post the ELC crisis period.

There was evidence that some learning symbols and resources crossed boundaries. The health and safety template originated in the FLN setting. The website was a merger of two separate websites (one from the ELC and the other from external group B) and it symbolised the process of negotiation and the development of the relationship between the two groups over the duration of the case study. The website reflects the practice of both groups. There is continuous negotiation about what the symbol represents and it will mean different things to different people. These differences are reflected in the two group logos present on the website.

The brochure is a tangible object that promotes individual businesses. Members can see the immediate value in it and they actively contribute to its development, they display it

in their respective businesses and they boast about how they worked together on it and how popular it is among the tourists, as P5 explained: "*...the book* [a promotional book created by group B] *didn't really work, it was lovely but tourist's never brought that with them, our brochure has been really popular*".

In summary, despite the resource constraints and resultant challenges outlined above, individuals value the collaborative activity of the ELC, as P8 told the group: "*I also agree with the necessity that this co-operative should continue.* [The ELC location] *businesses can only hope to benefit from any marketing done for the 2011 season, especially in the current climate*".

7.9 Key research findings summary

The key empirical research findings discussed in this chapter reveal a number of characteristics that influence learning in the ELC. These are summarised below in Table 7.8, and the ELC model is refined accordingly.

Table 7.8: Key empirical research findings

Theme	Key research findings
Learning membership & identity (LMI)	LMI's are complex & require different approaches to engage learners at a deeper level of involvement; Identity tensions and seeding structures may positively influence learning; Geographical distance from the ELC site can influence identity.
Learning broker	Broker role can be confused with co-ordination/ management role where it is not understood & legitimised; Needs to be legitimised or members will not see the value of learning strategies; Needs to be the responsibility of multiple persons to be effective in the ELC; Burn-out due to over burden of work is problematic.
Learning support	Phased learning supports are required at various stages of learning community evolution to ensure learner development & counteract learned helplessness; Tailored supports are required for different learner identities.
Learning strategies	Community level strategy required to establish shared meaning; Strategy needs to feed down to sub-group and individual levels and back to community level; Different strategies are required at the various stages of community evolution & learner development; Strategies are required to counteract action bias at sub-group level; The value of the strategy must be understood by the core team.
Learning relationships	FLN members have built trustful relationships that will take time for other ELC members to develop; Trust, equity in effort, recognition and legitimacy influence relationships and involvement; Even among core ELC members there is not always consensus, degree of divergence is positive but requires an overarching learning strategy to be effective; Danger that practice & learning reside at sub-group/ individual level;

Learning relationships (contd.)	Valuable external relationships can remain at an individual level in the absence of a strategy to leverage them; Community level strategy required to build shared meaning; Difficult in a voluntary setting where roles are not formalised; Where shared meaning is not understood it follows that expectations will not be understood.
Learning resources & symbols (LRS)	As living objects that embody learning they are of limited value as stand-alone objects; Interaction & negotiation is required; Where they are not understood by those that use them they mean different things to different ELC members; there is a danger that they may become obsolete; Members need to contribute to establishing or use the resources for ownership and buy-in to develop; Resource constraints are reflected in many ELC symbols.
Learning development	Not all learning development is centripetal; Reflection occurs as new tasks are discussed, practice is negotiated & roles change; A development path is required to keep learners engaged; Learner identities must be legitimised; succession planning is required to accommodate movement/evolution.

The proposed model (Figure 4.2, p. 86) illustrates the various levels of learning in the ELC from individual, sub-group and community level and is repeated here for clarity.

Figure 4.2: Evolving learning community model

--------------------*Time & sustained interaction*--------------------

External impulses:
Rapid change & intensified competition

Evolving Practice

Leveraging the resource pool

Local manoeuvring

Peer level
Cooperative strategies
Autonomy/interdependence
balance

Action/Reflection balance

Scanning & negotiating practice

Local manoeuvring

Negotiation

Individual level
Depth of Involvement
Identity development

Relationship dynamics   *Power dynamic*

Internal constraints:
Constrained resources

The key research findings are further considered now in terms of how they influence individual learning at various levels in the ELC:

- At an <u>individual level</u>, relationship dynamics (outlined in Table 7.8, p. 236), power dynamics and boundary dynamics influence learning. As a result, depth of involvement ranges from shallow to deep. To develop, the learner must be engaged in the practice of the community. In this context, a role and skills audit conducted at community level would serve two key purposes; it would legitimise different forms of involvement and it would provide a development path for individual members. These efforts would encourage deeper levels of involvement and as a result individual learning identity could develop over time.

- At <u>sub-group level</u> the core team should comprise an effective mix of learner identities. The contribution and interaction of individual members can be complementary when an effective mix of learner identities leads action and reflection at the core of ELC practice through the sub-groups. Contributions (referred to previously) include the management of tasks and activities, idea generation, knowledge and experience sharing. This structure ensures that facilitated peer led interaction can be embedded in the ELC's practice. However to be effective, sub-group level activities must have a guiding learning architecture at community level that articulates ELC norms and establishes shared meaning.

- At <u>community level</u>, the multiple person core team should develop the ELC's strategy and architecture. Representing individuals in the sub-groups, knowledge flows through the ELC's communication channel via the core team in a cyclical manner. This ensures embedded resource collation and management. In addition, a rotating structure overcomes several of the tensions identified earlier in this research study (for example, resource constraints, dominant leader issues, and challenges relating to membership criteria and boundaries) and would also enhance individual

learning development over time. A response loop at sub-group level binds together the practice and learning of individuals within the ELC.

The refined model (Figure 7.4) that follows reflects the contextual criteria that influence learning in the ELC; including the dynamic relationship between the ELC and its external environment where members leverage resources, scan for learning opportunities and negotiate practice. The model takes cognisance of the identity tensions and seeding structures that arise at an individual level from prior external learning experiences. External/border activity may be lost to the ELC if these activities are not leveraged and supporting learning architecture is required to aid this process. This could be achieved via a knowledge capture/transfer strategy that feeds idea generation from the ELC border back into the centre of practice. Here, the core team ensure an action-reflection balance is maintained and through a response loop and the ELC's communication flow ensures that the learning agenda is visible and that channels of communication are open from individual up to community level.

7.10 Refining the ELC model

The author refined the proposed ELC model below (Figure 7.4) based on the key research findings summarised in section 7.9, (p. 236) and the impact these have on individual learning at various levels in the ELC.

Figure 7.4: Refined ELC model
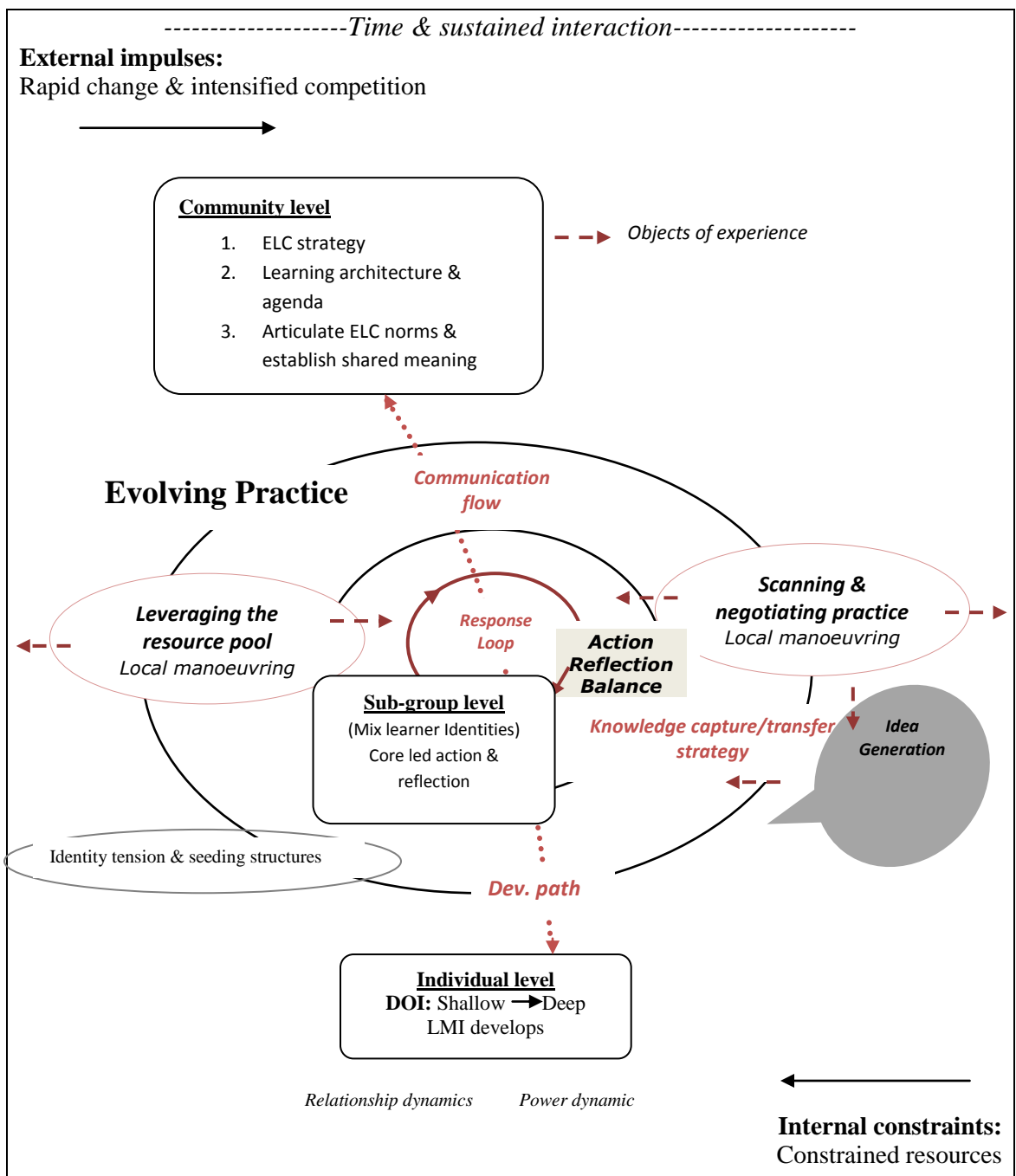
7.11 Conclusion

This analysis has demonstrated that external ELC factors influence learning; as such they need to be incorporated in to the learning architecture of the community.

The requirement for a 'multiple-learner identity' core would counteract the well reported action bias of micro-firm owner/manager learning settings. The responsibility for achieving an action/reflection balance should be apportioned among a number of individuals, in recognition of the time and resource challenges in this environment. If the ELC strategy and learning agenda are visible at community level, then each member understands his/ her role, knows that their contribution is valued, and understands and values the role and contribution of others.

Learner involvement requires targeted efforts to engage less active learners, and the socialisation process must incorporate phased learning supports that cannot be effectively provided by any one leader in the ELC environment. It is only through these efforts that shared meaning can be established as the basis for deeper learning relationships over time.

In the next chapter, the author examines the key research findings and provides a summary of the research outcomes. Key contributions are outlined and recommendations for future research are suggested.

Chapter Eight

Conclusions and recommendations

8.0 Introduction

Having discussed the research findings in the previous chapter, the final chapter summarises the research conclusions, recommendations and key contributions to knowledge in relation to individual learning in ELCs.

The theoretical issues highlighted throughout this research are explored in this chapter. Key elements and relationships that influence learning in the case community, as highlighted in the field by ELC members are discussed. Coupled, these insights provide an answer to the research question: *What are the elements and relationships that influence individual learning in Evolving Learning Communities, after facilitated supports reach a conclusion?*

These insights have been conceptualised in the refined ELC model (Figure 7.4, p. 241) and implications for theory and practice are addressed in the latter part of this chapter. Finally, research limitations are discussed in the context of this exploratory study and recommendations for future research are presented.

8.1 Thesis aim and objectives

This programme of research (outlined previously in figure 1.1, p. 9) sought to explore the elements and relationships that influence individual learning in Evolving Learning Communities (ELCs), after facilitated supports reach a conclusion, while the research objectives (RO) sought:

1. To explore the construction of the social and learning infrastructure in an evolving learning community;
2. To examine the development, maintenance and management of the learning relationships and structures in the case community over time;
3. To map the factors supporting and impeding individual and collective learning in the case community;
4. To refine the learning community model based on the research findings.

The aim of the following section is to reflect on the key findings uncovered during the research and to summarise the research outcomes presented in chapter seven. The author acknowledges the secondary sources outlined previously in chapters two to four, and in the tourism sector review (chapter five, p. 90) with particular reference to identified gaps in the literature.

8.2   Summary of research outcomes

The learning structure and relationships within the ELC evolved over the duration of the case and there was evidence of learner development at individual and sub-group level. However, when learning development is considered at community level, it falls somewhat short of a learning strategy that is likely to sustain the ELC in the longer term.

The conclusions from this programme of research have been arrived at, with an underlying appreciation of the particular resource and management challenges in this independent learning setting (as referred to by Devins et al. (2005); Morrison and Teixeira (2004); Lange et al. (2000); Storey and Cressy (1996); Schaper et al. (2005); Thomas and Gray (1999); Welsh and White (1981) among others) that contribute to the challenges associated with establishing and maintaining an independent learning community. It is likely that this would be the case for other micro-firm learning communities.

The evolution of the ELC during the crisis represented a new chapter in the ELC's practice, where core members had a mandate for the first time in the history of the learning community, to set rules and norms around involvement and expectations. In hindsight, this may appear to have been the optimal approach to have taken from ELC establishment, but the likelihood is that the learning community may not have been successful in gaining community-wide buy-in at this early stage in the learning community's development. It remains to be seen if less active members demonstrate deeper levels of involvement over time. The empirical research findings strongly suggest that tailored approaches are required to engage different learner identities and that phased strategies are required as the learning community evolves to ensure sustainability in the longer term.

In exploring the construction of the social and learning infrastructure in an evolving learning community (RO1); and the development, maintenance and management of the learning relationships and structures in the case community over time (RO2), the literature revealed the following key learning themes:

Table 8.1: Key literature findings

Theme	Key literature findings	
Learning membership & identity (LMI)	Influenced by: • Depth of involvement & membership criteria; • Trust & histories of learning; • Lifestyle & business motivation; • Power structures; A range of identities contribute to practice; Identity is shaped between learning communities.	Handley et al., 2006; Wenger, 1998. Wenger, 1998. Dewhurst et al., 2007; Thomas & Thomas, 2006; Morrison & Teixeira, 2004. Roberts, 2006; Handley et al., 2006; Marshall & Rollins; 2004; Thompson, 2005. Handley et al., 2006; Wenger, 1998 & 2000. Handley et al., 2006
Learning broker	Role is to promote autonomy; encourage reflection & anchor learning in the practice of the ELC; Demonstrates visible learning competencies; Can stimulate buy-in & learning but success requires legitimacy; Central in maintaining an action/reflection balance.	Halme, 2001; Kelliher & Reinl, 2011; Wing Yan man, 2007. Wenger, 2006; Murillo, 2011. Florén & Tell, 2004; Kolb, 1984; Sullivan, 2000; Tell & Hallia, 2001; Kelliher & Reinl, 2011.
Learning support	Different levels of support are likely to be required for members at different phases & depth of involvement.	Halme, 2001; Kelliher & Reinl, 2011; Wing Yan Man, 2007.

Theme	Key literature findings	
Learning strategies	Learning emphasis must be maintained & managed, requiring a level of competency;	Morris et al., 2006; Bessant & Tsekouras, 2001; Kekale & Vitalia, 2003; Wing Yan Man, 2007.
	Cooperative strategies are learned in action as relationships develop over time.	Wenger, 1998; Florén & Tell, 2004.
Learning relationships	Influenced by seeding structures & shared histories of learning;	Thompson, 2005; Wenger et al., 2002.
	Differences in interpretation require negotiation; Process is positive unless it disrupts engagement;	Human & Provan, 2000; Lave & Wenger, 1991.
	Requires a delicate balance between interdependency & autonomy;	Reinl & Kelliher, 2010.
	Involves local manoeuvring with external environment;	Kelliher & Reinl, 2010; Wenger, 1998/2006
	Multiplicity of perspectives equate to differing expectations;	Wenger, 1998; Lave & Wenger, 1991.
	Lack of leadership & guiding structure at early stages could impact the psychological contract.	Weber & Khademian, 2008.
Learning resources & symbols (LRS)	Embody shared learning & knowledge; Contribute to shared meaning over time;	Lave & Wenger, 1991; Wenger, 1998.
	Value lies in the way that the creators interact.	Tell, 2000; Kelliher & Reinl, 2011.
Learning development	Learning develops through engagement in practice;	Lave & Wenger, 1991; Wenger, 1998
	Danger that action bias may push the learning agenda to the side, success is dependent on learning competence;	Choueke & Armstrong, 1998; Lawless et al., 2000; Sullivan, 2000; Noel & Latham, 2006.
	Levels of learning competence are evident in demonstration of higher level learning behaviours.	Reinl & Kelliher, 2011; Chaston & Mangles, 2000 Wing Yan Man, 2007.

Addressing RO3: *to map the factors supporting and impeding individual and collective learning in the case community*. The literary findings outlined previously in Table 8.1 are mapped alongside findings the primary research findings (Table 8.2).

Table 8.2: Key research findings

Theme	Key literature findings	Primary research findings
Learning membership & identity (LMI)	Influenced by: • Depth of involvement & membership criteria; • Trust & histories of learning; • Lifestyle & business motivation; • Power structures; A range of identities contribute to practice; Identity is shaped between learning communities.	LMI's are complex & require different approaches to engage learners at a deeper level of involvement; Identity tensions and seeding structures may positively influence learning; Geographical distance from the ELC site can influence identity.
Learning broker	Role is to promote autonomy; encourage reflection & anchor learning in the practice of the ELC; Demonstrates visible learning competencies; Can stimulate buy-in & learning but success requires legitimacy; Central in maintaining an action/reflection balance.	Broker role can be confused with co-ordination/ management role where it is not understood & legitimised; Needs to be legitimised or members will not see the value of learning strategies; Needs to be the responsibility of multiple persons to be effective in the ELC; Burn-out due to over burden of work is problematic
Learning support	Learning emphasis must be maintained & managed, requiring a level of competency; Cooperative strategies are learned in action as relationships develop over time.	Phased learning supports are required at various stages of learning community evolution to ensure learner development & counteract learned helplessness; Tailored supports are required for different various learner identities.

Learning strategies	Learning emphasis must be maintained & managed, requiring a level of competency; Cooperative strategies are learned in action as relationships develop over time.	Community level strategy required to establish shared meaning; Strategy needs to feed down to sub-group and individual levels and back to community level; Different strategies are required at the various stages of community evolution & learner development; Strategies are required to counteract action bias at sub-group level; The value of the strategy must be understood by the core team.
Learning relationships	Influenced by seeding structures & shared histories of learning; Differences in interpretation require negotiation; Process is positive unless it disrupts engagement; Requires a delicate balance between interdependency & autonomy; Involves local manoeuvring with external environment; Multiplicity of perspectives equate to differing expectations; Lack of leadership & guiding structure at early stages could impact the psychological contract.	FLN members have built trustful relationships that will take time for other ELC members to develop; Trust, equity in effort, recognition and legitimacy influence relationships and involvement over time; Even among core ELC members there is not always consensus, degree of divergence is positive but requires an overarching learning strategy to be effective; Danger that practice & learning reside at sub-group/ individual level; Valuable external relationships can remain at an individual level in the absence of a strategy to leverage them; Community level strategy required to build shared meaning; Difficult in a voluntary setting where roles are not formalised; Where shared meaning is not understood it follows that expectations will not be understood.

Learning resources & symbols (LRS)	Embody shared learning & knowledge; Contribute to shared meaning over time; Value lies in the way that the creators interact.	As living objects that embody learning they are of limited value as stand-alone objects; Interaction & negotiation is required; Where they are not understood by those that use them they mean different things to different ELC members; there is a danger that they may become obsolete; Members need to contribute to establishing or use the resources for ownership & buy-in to develop; Resource constraints are reflected in many ELC symbols.
Learning development	Learning develops through engagement in practice; Danger that action bias may push the learning agenda to the side, success is dependent on learning competence; Levels of learning competence are evident in demonstration of higher level learning behaviours.	Not all learning development is centripetal; Reflection occurs as new tasks are discussed, practice is negotiated & roles change; A development path is required to keep learners engaged; Learner identities must be legitimised; succession planning is required to accommodate movement/evolution.

The primary research findings outlined above (Table 8.1) are discussed now in the context of the literature and how they relate to the research objectives. Finally the refined ELC model is presented based on the findings (RO4).

- <u>The ELC has a forced and reactive learning environment</u>

  The ELC is externally influenced. It is a forced learning environment (as previously depicted in Figure 2.1, p. 35) but the empirical research findings demonstrate that the ELC is also very reactive to challenges and opportunities in the external environment. ELC members engage with the external environment through a sophisticated process of local manoeuvring where members scan the

environment for learning opportunities and resources to facilitate practice. While examples of this 'manoeuvring process' can be found in the network and learning literature, there is little knowledge in relation to how these external learning relationships are leveraged in an ELC context and how they influence individual learning within. The empirical research also demonstrates that identity tensions exist for ELC members as a result of multiple learning community membership, just as Handley et al. (2006) described. The findings suggest that these tensions may be amplified in rural community settings where local politics can influence how the learner engages in practice. Facilitated supports are required to enable ELC members to overcome these issues.

These external influences and activities can positively influence learning however the primary findings demonstrate a number of pre-requisites for success. Firstly, mechanisms are required to leverage the knowledge and idea generation that often occurs at the borders of the ELC. Secondly, in the absence of learning structures and supports the danger is that these activities remain at individual level. The ELC model has been refined to reflect these findings (RO4).

- <u>The ELC structure evolves over time and phased learning supports are required</u>

The empirical research findings suggest that phased learning supports are required at different stages of community evolution. Just as Fox (2000) critiqued, CoP theory contributes little to the knowledge and understanding of evolving practice. Specifically, the supports required to sustain individual learning through phases of learning community evolution were previously not understood. The literature outlines many aspects of the learning broker role (as outlined previously in Table 8.1). In the main, this research relates to brokers with mutually defined identities and legitimised roles (Wenger, 1998) situated within a network or larger organisational context. There is no previous knowledge about how brokers would function in an independent learning setting. The literature extols the learning support and contribution provided by the broker. There is little evidence that the relationship between the broker and other members of the learning community is anything other than positive in

learning terms (as outlined in Table 8.1) with the exception of research that suggests the requirement for the legitimisation of the role (Wenger, 1998) and the need to manage learned helplessness (Reinl and Kelliher, 2010).

In the absence of pre-ELC learning support it falls to those that establish the ELC and demonstrate higher level learning behaviours (broker) and to provide learning support. The case findings unveil a number of ELC support requirements and a number of challenges associated with providing that support. Furthermore, the empirical findings demonstrate that support requirements and challenges differ at various stages of learning community evolution. It can be concluded from the case findings that it is not feasible that the broker role in the ELC could be the responsibility of any one person and be effective in the long term.

Based in a resource constrained environment (discussed previously in section 2.4.3, p. 28) there is a tendency on the part of the majority to let more active members 'get on with it'. Just as Wenger (1998) described, certain individuals orientate themselves to the role of broker in the ELC. However, where there is an absence of formalised roles and tasks and limited resources (as referred to by: Devins et al., 2005; Morrison and Teixeira, 2004; Schaper et al., 2005 among others) to dedicate specifically to the management of the ELC, achieving community wide learner involvement is an extremely challenging task for the broker. The empirical findings suggest that burn-out can occur among active members over time and if greater inclusion is not achieved at this point there is a danger that in the absence of a learning agenda the ELC would likely fail over time.

The case findings demonstrate that the dominant leadership structure that featured in the ELC before the crisis was instrumental in its early success. However, as time passed the leadership structure had unintended negative consequences for the depth of involvement with many ELC members not achieving ownership of learning (Foley et al., 2007; Wyer et al., 2000). Indeed the findings suggest that a single broker (even one operating on a full-time basis)

would not be optimal or desirable in this setting considering the collective learning ethos and the goal of learner development.

The empirical research findings demonstrate that having secured a mandate from the wider community to continue practice during the crisis, and democratically constructing shared meaning of the ELC going forward via a collective leadership framework, the new core leadership/management team forcefully laid down rules of membership and openly expressed expectations regarding ELC involvement. As a result, the core team achieved more inclusive engagement. The findings indicate that a rotating multiple person core structure should overcome the issue of dominant leadership and may result in a more collegial ELC in the future. It is important to note that P1 and the core team had established the 'learning value' of the ELC to the wider learning community during the crisis and it seems likely that without that development, the ELC would have failed to evolve to the next phase. Reflecting the findings above, the ELC model was refined to incorporate the collective leadership structure (Figure 7.4).

As the CoP perspective suggests (Lave and Wenger, 1991; Wenger, 1998) learning strategies are 'learned in action' over time, but there was a paucity of direction in the literature as to how ELC structures and supports are developed, maintained and managed over time to facilitate individual learning (RO2).

- <u>A learning agenda is required to sustain the ELC over time</u>

As outlined above, the structure of the learning community evolved from a simple structure with a dominant leader that mirrored the micro-firm environment and encouraged practice and the establishment of shared meaning at a sub-group level (Figure 8.1-Phase 1) to a more sophisticated structure that represented greater involvement at the core, and greater interaction between the core and the wider community (as demonstrated previously in Figure 7.1, p. 168). Directly after the crisis, there were indications that the existing learning agenda was in danger of being marginalised as ELC practice evolved from phase one to phase two (see below).

Figure 8.1: Learning community evolution
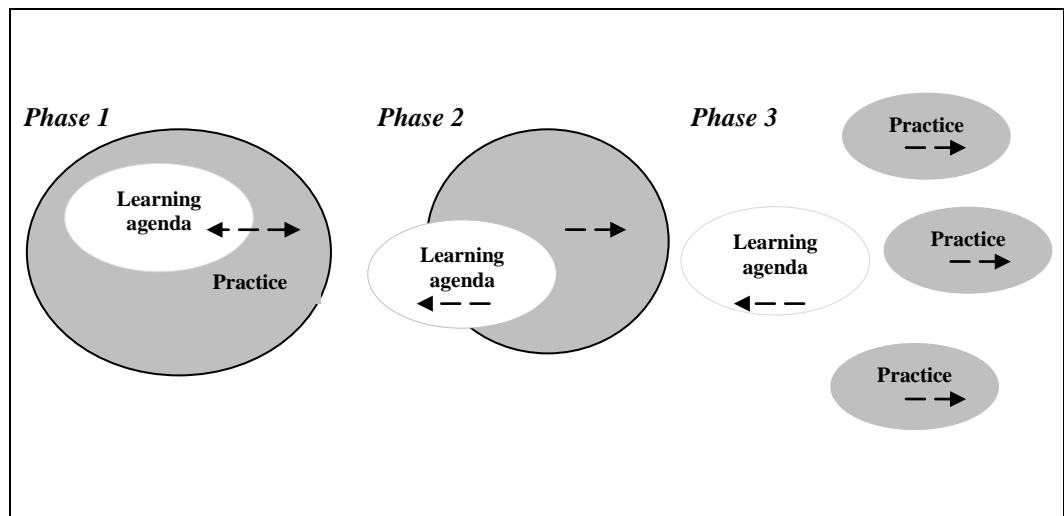
There were indications that the group's practice could have moved on to phase three had members continued to align themselves to specific aspects of ELC practice at sub-group level. In this case, the sub-committees could potentially have formed communities of practice in their own right, but in the absence of a learning agenda and infrastructure (as depicted in Figure 8.1, - phase 3) a likely outcome would be that they would fade out over time.

- A community level learning agenda/ strategy is necessary to sustain individual learning

While it is evident from the case data that the sub-group level structure is necessary (due to the workload associated with ELC management, the resource constraints of micro-firm owner/managers in the ELC and the heterogeneity of members businesses); lacking a cohesive community level learning emphasis, the sub-group structure fuels the previously discussed action bias of micro-firm owner/managers (Choueke and Armstrong, 1998; Lawless et al., 2000; Noel and Latham, 2006; Sullivan, 2000). This clearly impedes individual and collective learning over time. The case findings reveal that where individuals redefine practice at this level, practice begins to live in the sub-groups. There is a resultant culture gap between sub-group members and others; this is evident in

marked differences in the communication dynamic between individuals, sub-groups and the ELC.

In phase two of the community's evolution the mixed identity core group maintained an effective action/reflection balance. As such, this structure has been incorporated into the ELC model (RO4).

- Tailored learning supports are required to engage different learner identities in the ELC

The issues that arise with differing levels of engagement have been alluded to in the literature, for example Handley et al. (2006) suggest that perceived inequities lead to disengagement over time. Even in an organisational context (as is the case in much of the CoP research) there is little guidance as to how these issues can be overcome. Specifically, nuances of the ELC such as the voluntary nature of participation require particular consideration.

While some CoP literature has begun to explore different identities and how they contribute to practice (Handley et al., 2006; Wenger, 2000) these are in the main, static descriptions that fail to consider learner development and the evolution of learner identities over time.

As it stands the literature does not to address how to engage and support different learner identities in practice. The empirical evidence demonstrates that a mix of learner identities at the core of practice facilitates learning in the ELC. However, those members that are more action focused do not recognise the value of contributors that bring ideas or instigate reflection on practice. These findings suggest that there is a requirement to make learner roles and activities visible through a community wide communication strategy. Also in acknowledging that different individuals have different competences to bring to the table, it follows that tailored supports may be required to engage different learner identities and co-ordinate their efforts for the benefit of individual learning.

- A communication strategy can promote awareness and understanding of various roles and activities in the wider community

  Dialogue and negotiation at meetings, subsequent meeting minutes and other email communications are key communication tools in the ELC. The communication strategy was very successful in the earlier stages of the case study. In particular, e-mail communications at community level were instrumental in establishing shared meaning after the crisis and led to deeper levels of involvement and learning for many individuals. In the ELC's evolution to stage two, had the meeting minutes become less comprehensive in P1's absence, this communication activity may have been lost to the wider community. While the collective leadership/management framework should enhance engagement, less comprehensive minutes could discourage non-core members from engagement due to a lack of awareness/ connectivity. Even where individuals did not reply to ELC emails, the communications were read. The communication structure made activity visible at a community level and as such it has the potential to enable more inclusive engagement.

- Learning development

  A key finding of this research is that not all movement (learning development) is centripetal in direction as the CoP perspective suggests (Lave and Wenger, 1991; Wenger, 1998). Higher level learning roles observed in the case study contributed to the establishment and maintenance of the ELC and to knowledge and idea generation in the wider community (as illustrated in the refined ELC model). These behaviours were frequently observed in individuals that were not core to the ELC and these contributions were recognised and valued by a minority of ELC members strong in the broker role. Higher level learning roles emerged over time and these were granted legitimacy by core members during the crisis, demonstrating learner development in the ELC. These empirical research findings demonstrate that learner identities are complex and the researcher concurs with Jørgensen and Keller's (2008) critique of Wenger's (1998) overly simplistic notion of learner identity.

Most ELC members demonstrate a preference for immediately applicable learning and when reflection was at a minimum (pre-crisis), there was an inclination for members to remain in a single-loop (problem-based) learning mode. Deeper levels of learning occurred during and after the crisis and when dividing up P1's role.

- <u>Learning strategies need to be established prior to phasing out learning support</u>

Many of the community level strategies observed under P1's leadership (for example community level email communication) appear to be evolving in the new structure. These strategies have become '*the way we do things here*' (P6). The new structure affords a deeper level of comprehensiveness and the new core team are diligent with regard to detail, but findings suggest that these members may not truly understand the learning value of existing strategies. Over time, if community level engagement and resources become an issue, current strategies and associated activities are likely to be jeopardised.

Different learner identities are more effective in particular roles, as highlighted in this case (see exhibits in chapter seven for details). Achieving an effective mix of learner identities at the core has a positive influence in terms of maintaining a learning emphasis and an action/reflection balance in the ELC. Here, the broker is effective at ensuring reflection; other members demonstrate a preference for idea generation and seeking out new learning projects, some individuals' co-ordinate people and tasks very well. Other activity focused members enjoy manning the display stalls and greeting tourists in the ELC location, or developing specific ELC resources such as the website and brochure. Notably, acknowledging the value of each role, and the contributions of individual members, were often used to good effect by the learning broker(s).

As the literature demonstrates learned helplessness can be fostered through training provisions (Candy, 1987 and Sadler-Smith et al., 2000). This also occurs in the FLN environment (Reinl and Kelliher, 2010) and the case findings reveal that learned helplessness can continue to impede learning in the ELC setting. It follows that the broker needs to take a step back and phase out levels

of support to counteract this problem. However in the ELC, this can only be effective where learning is underpinned by an overarching learning strategy (as incorporated in the ELC model below).

- Participation and depth of involvement are complex

Where roles were not managed effectively in the ELC active members became over-burdened and disengaged from the wider learning community. This pushed involvement and identity down to sub-group level and demonstrates that inequities in effort and commitment can lead to the disengagement of active members as time passes as Handley et al. (2006) suggested. This finding confirms the requirement for people management/ succession planning in this independent setting.

Lifestyle factors and motivation for involvement also had a significant impact on the nature and depth of involvement of ELC members, this is an established influence on learning and business development in the tourism setting (as outlined in Table 8.1, p. 246). An unexpected influence on learning membership and identity that may be particular to the tourism setting was geographical distance from the case community and its influence on identity. A strong finding that emerged was that frequency of participation and depth of involvement differ substantially among members, even as the community matured. This finding is in contrast to the CoP suggestion that learning development and full participation occur in tandem. Specifically, lifestyle entrepreneurs or those motivated to join the ELC through political pressures or a sense of civic duty tended to align themselves to particular aspects of ELC practice to the detriment of community level learning. This disconnect from the wider community is accelerated in the absence of shared meaning at community level and contributes to disengagement over time.

- ELC resources reflect the resource constrained environment

The empirical findings concur with Wenger's (1998) viewpoint that learning community resources are living objects that are of limited value in the absence

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of interaction and understanding. Many of the ELC's resources reflect its resource constrained environment. Resources are created by those that have time or expertise to create them and as such, they do not represent shared learning and knowledge in the wider community. The case evidence also suggests that they mean different things to different ELC members. Specifically, where they are not understood by those that use them in the ELC there is a danger that they become obsolete and where others are unaware of their value they are lost to the wider community.

The longitudinal case provided rich insights into the evolution of the learning community over time; these insights facilitated the refinement of the ELC model (Figure 7.4). Learning development was evident over time at individual level, sub-group level and community level. This was mirrored in the development of the learning infrastructure of the ELC. The value of the longitudinal approach was particularly evident in the latter stages of the case study, as earlier findings were contradicted by later evidence, and the learning structures and identities took time to develop as the community evolved.

In concluding the summary of research outcomes and addressing RO4, the refined learning community model previously presented in chapter seven (p. 241) is repeated below for completeness.

Figure 7.4: Refined ELC model
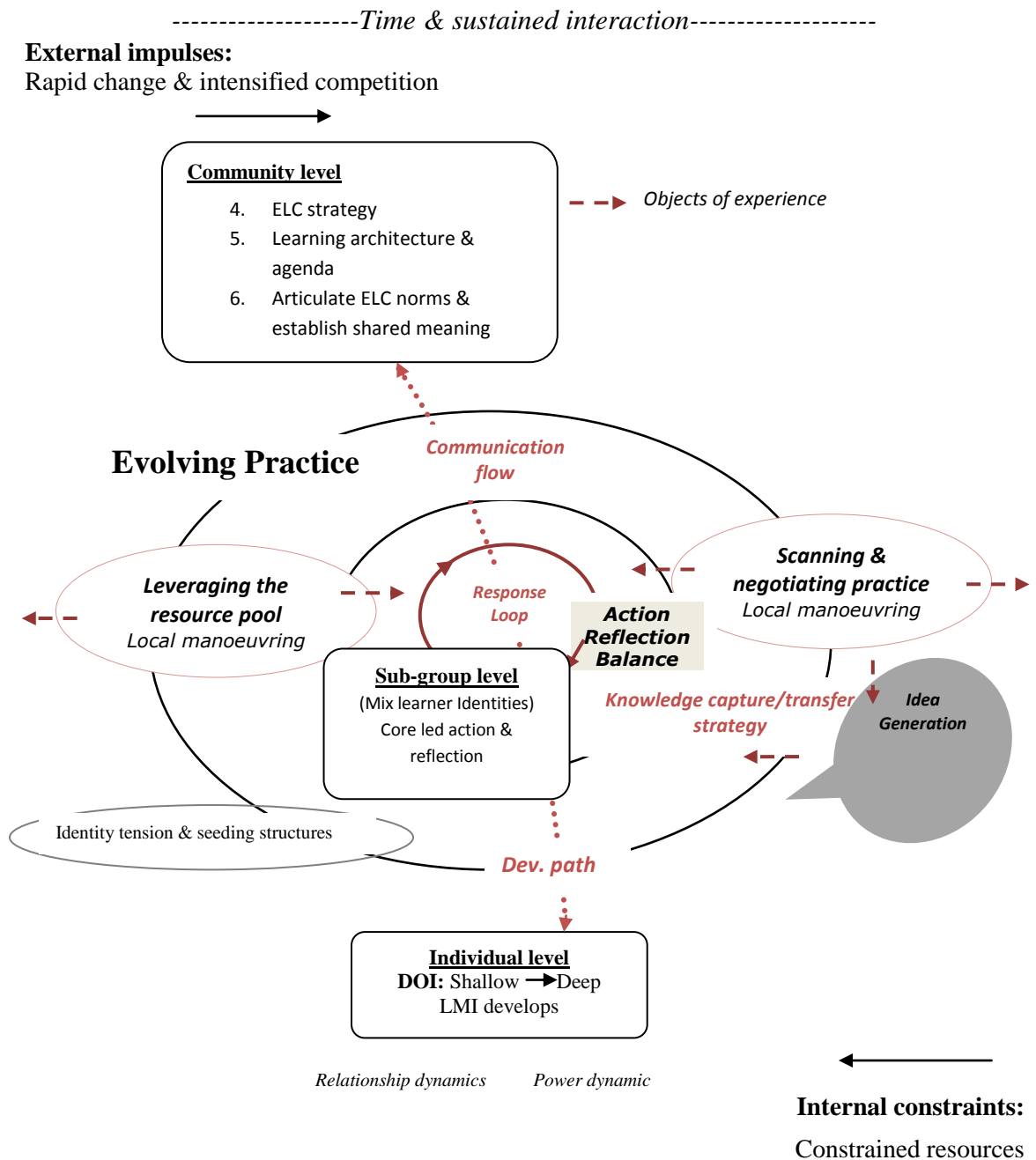
8.3 Recommendations

The author acknowledges that the following recommendations are not a panacea for the learning challenges in ELCs. However, having mapped the criteria that influence learning in this setting (RO3) a number of recommendations are made that may support individual learning and assist with the sustainability of ELCs over time:

- <u>ELC aims and objectives must be established in the early phases of learning community evolution</u>

  The research demonstrates that a dominant leader/champion and a number of active former FLN members were effective in gaining broad agreement from tourism owner/managers in their business community for ELC participation. Based on the research findings it is recommended that aims and objectives should be established at community level in the early stages of ELC formation. In this context, an informal charter/ strategy should be developed and reassessed after a ten to twelve month period once newly formed learning relationships are given time to develop. This would permit ELC members with an initial opportunity to build shared meaning (Lave and Wenger, 1991) and enough time to build trust.

  Once learning relationships are more established, (as they are in the case ELC) the strategy should be formalised and reviewed on an annual basis by the (rotating) core group. This approach would facilitate the negotiation process, as individuals get an opportunity to interact with, understand and modify the strategy. This process is an important factor in developing learning ownership and ensuring the relevance and sustainability of learning resources (as outlined in Table 8.2). This exercise would further strengthen learning relationships between core members and those that have been less engaged in the ELC.

- A collective core leadership structure is recommended

  The case findings demonstrate that a multiple person core structure that incorporates a mix of learner identities is effective in the ELC environment and as such that structure is recommended for other ELCs. Specifically, a rotating core structure could overcome equity and succession issues. To be effective, subgroup strategies must support the ELC's overall strategy and the learning agenda needs to exist at all levels. In this context, it is recommended that the core group should have responsibility both at sub-group and at community level.

  There is potential to expand the core by rotating key roles within the ELC over time. This would help to overcome the perceived 'geographical distance' between those members that reside in the ELC village and non-resident (rural) members and would provide a trajectory of development for learners. Likewise, this approach may bridge identified culture gaps between group B and the ELC in the longer term.

- ELC sustainability requires learning support and succession planning

  The research findings suggest that the sustainability of this type of structure requires more formalised strategies and succession planning. Business development support agencies should provide training support to potential brokers and core members to increase their understanding of and ability to manage:

  ✓ Issues that influence involvement;
  ✓ Key roles and their learning value;
  ✓ Key strategies required to support learning (ELC structure design, communication strategy, knowledge strategy and succession planning).

Based on the findings of this research a facilitated workshop is recommended for the newly appointed core team of the case community. Here, the value of

different roles and learning identities within the community should be outlined. This would overcome a number of learning barriers at community and sub-group level including disengagement, role confusion, and expertise drain and would also counteract perceived contribution/effort inequities among active members (Handley et al., 2006). An increased understanding of the various identities and their contribution would enable the core group to legitimise different roles and contributions (Wenger, 1998) and set boundaries around those roles. Although there is no scope for reward in the ELC, the empirical research findings suggest that recognition is an important feature of independent learning community management (as outlined in Table 8.2). In this context, it is recommended that ELC communications should highlight activities that add value to the ELC, in line with the overall strategy. This would also provide a basis for improving individual ELC member skills.

As part of this workshop a skills audit for core and active members should be undertaken. Giving form to the experience of ELC members through the production of objects (such as job descriptions or a charter) that encompass that experience and understanding (Wenger, 1998) would also complete the learning loop from surface to deeper levels of learning (Argyris, 1977). Existing and potential knowledge resources (including templates, documents, etc.) should also be identified and included in this audit, so that the core team can recognise and leverage these resources at community level.

These efforts would also facilitate succession planning in the longer term.

- <u>Efforts to encourage depth of involvement</u>

Based on the research findings it is recommended that targeted efforts should be made to engage those that are less active in the early stages of ELC development. Here, a dedicated facilitator could oversee the process (as already suggested by P8 during the case study). However, the empirical findings suggests that learning value needs to be established in the community by the leader/ core group prior to any attempts at community-wide external intervention/ training. Having established learning value, an external facilitator

is recommended as they would provide a valuable outside-in perspective (Haugen Gausdal, 2008; Morrison and Bergin Seers, 2001) and could address lifestyle factors that influence involvement (Ateljevic and Doorne, 2004; Getz and Carlsen, 2005; Morrison et al., 2008; Reijonen and Komppula, 2007; Thomas et al., 2011) and potentially overcome issues of politics (Marshall and Rollins, 2004).

When learning relationships have matured, identified barriers to leveraging individual learning up to community level in the case study, could be counteracted by building opportunities into meetings for showcasing individual business strategies and experiences much like in the FLN environment (Kelliher and Reinl, 2011). The case findings demonstrate that these were often lost in the ELC. Sharing expertise would also promote knowledge flow and build shared meaning, further strengthening learning relationships (Lave and Wenger, 1991; Kelliher and Reinl, 2011). As such, a knowledge capture transfer strategy disseminated through the communication channel is recommended and built into the refined model (Figure 7.4, p. 241).

Cognisant of the barriers to engagement outlined previously, a response loop via the emailed meeting minutes or through the core group may be valuable for a number of reasons. Incorporating knowledge transfer activities into the ELC's routine, would help to complete the experiential learning loop (Kolb, 1984), increasing the potential for individual learning to take place, and for this learning to be embedded in the ELC.

- <u>Enhancing learner autonomy</u>

Given the recommended multiple person core structure, there is a danger that the bulk of ELC efforts could be distributed among the core active ELC members. At this juncture in the ELC's evolution, it is crucial that the core team understand the rationale for phased learning supports that counteract learned helplessness and promote learner autonomy. The external training intervention recommended above for the core team should incorporate this aspect of learner development.

- <u>Community level strategies are required to sustain individual and collective learning over time</u>

  1. *Knowledge strategy*

     A sophisticated learning structure is in place in the ELC and the group need to recognise that they have the ability to take on higher level learning projects in pursuit of tourism location and business development. This activity should be built into the longer term ELC strategy. There is evidence to suggest that these types of projects would engage members that are strong in idea generation and the marketing function at a deeper level. There would be considerable development value in a community level knowledge capture/knowledge transfer strategy in the ELC. Here, the group could capitalise efforts and activities that the findings are currently successful at individual member and sub-group level.

  2. *Communication strategy*

     The case evidence demonstrates that comprehensive meeting minutes preserve a community-wide learning and practice emphasis. As evidenced in this research, the minutes allow for individual reflection on ELC activities and interactions, enhancing the completion of the learning cycle (Kolb, 1984) and potentially encouraging a greater action-reflection balance at group level. Specifically these communications should include details of tasks and roles, ideas for collaborative practice, local manoeuvring activities and results, learning opportunities, idea generation and knowledge and information sharing. Implementing a cyclical communications flow from the individual level, through to the sub-group and community level and vice versa is important to maintain engagement and depth of involvement in the wider community. Equally a response loop (discussed above) at sub-group level ensures that individual learning can be leveraged for the benefit of the wider community. This is particularly important in a micro-firm environment such as the ELC, which has inherent resource challenges. The ELC model is refined to incorporate this recommendation.

- <u>External ELC supports are required for ELC sustainability</u>

It is recommended that tourism policy makers should take a longer term view of the success of learning networks and of the ELC case community in particular. Given the successful establishment of the learning community and the mature learning relationships within, there is potential to leverage and develop a powerful learning resource in pursuit of tourism business development and rural development and sustainability. The goal of learning networks is to encourage future independent co-operative learning activity and success is dependent on the learning competence of those that establish ELC's. Despite this, there is little evidence in recent research to suggest that there is a training or support remit with regard to learner development and independent learning community evolution in the learning and network literature. The case evidence suggests that external supports would assist with ELC sustainability.

Having successfully established the learning community and moving on to a second phase in its evolution, likely support requirements include: group dynamic and group development training, role development and boundary advice, knowledge management strategies, negotiation and motivation techniques and facilitated knowledge and idea generation workshops. LEADER groups and Fáilte Ireland regional support centres are well placed to deliver such training and would themselves benefit from building a more dedicated knowledge sharing loop with the ELC group.

Given the aim of sustaining learning communities in the longer term, partnership with an academic support team experienced in learning network structure and evolution is recommended and would permit informed design of higher level learning and training initiatives tailored with the nuances of independent learning communities in mind.

Post FLN interventions are recommended prior to ELC establishment. In this context potential brokers/ champions and idea generators in the FLN should be identified. FLN support teams are well placed to identify these individuals. Collaboration with key tourism and business development support groups would

permit greater knowledge transfer and assist in aligning ELC goals with national and regional business development objectives.

8.4 Contribution to knowledge

The purpose of this research was to explore the elements and relationships that influence individual learning in Evolving Learning Communities (ELCs), after facilitated supports end. This research makes a valuable contribution on a number of levels:

8.4.1 Theoretical contributions of the research

The case research has revealed valuable insights into the elements and relationships that influence learning in the ELC. In particular, the depth of access achieved in this longitudinal case study yields a contribution that has highlighted new areas for description and theory generation and has also extended existing theory in this previously under-explored learning setting. This longitudinal case approach featured in Lave and Wenger's seminal work (Lave and Wenger, 1991; Wenger, 1998) and has been used extensively in research studies on CoP since (for example Thompson, 2005). The value of longitudinal research when studying learning is established in literature (Bryman, 2004; Pettigrew, 1990) and has proven to be particularly insightful from an evolutionary learning community (Human and Provan, 2000; Toiviainen 2007) and learning competency development perspective (Kelliher and Reinl, 2011) in the micro-firm setting. This theoretical contribution could not have been achieved through the use of a more external/ distant method.

8.4.1.1 New areas for description

To the best of the researcher's knowledge, no research to date has considered learning development from the micro-firm to an FLN and onwards to an independent learning community setting. The literature also fails to adequately explore the different relationship and identity dynamics within such communities (Handley et al., 2006; Thompson, 2005). Specifically, the CoP literature fails to address learner movement

that is not centripetal and there is considerable value in the categorisation of different forms of learner involvement and development.

8.4.1.2 Theory generation

While models of learning have been modified in response to the growing prevalence of collaborative learning communities (see Beeby and Booth, 2000; Knight and Pye, 2005 for example), the majority of this research is based on collaborations between larger businesses. Others have extended the CoP framework, acknowledging the limitations of the CoP perspective in exploring management learning in networks (Haugen-Gausdal, 2008; Juriado and Gustafsson, 2007). This research sought to: *explore the elements and relationships that influence individual learning in ELCs, after facilitated supports end,* and to refine the learning community model based on the research findings. The model addresses a current gap in learning community knowledge by addressing learning at an individual and at a community level in the ELC setting.

8.4.1.3 Extension of existing theory

This research builds on the community of practice concept (Brown and Duguid, 1991; Lave and Wenger, 1991; Wenger, 1998) extending the work of others in relation to micro-firm learning (Chell and Baines, 2000; Devins et al., 2005; Hannon et al., 2000; Kelliher and Reinl, 2011; Witt, 2004), network centred learning (Florén and Tell, 2004; Taylor and Thorpe, 2004) and tourism learning communities (Ahmad, 2005; Kelliher et al., 2009; Kelliher and Reinl, 2011; Morrison et al., 2004). This research also broadens previous work on network learning and management (for example Knight, 2002; Knight and Pye, 2004), whilst also acknowledging the nuances of independent learning communities set in a micro-firm context.

8.4.2 Practical contribution to knowledge

This research provides a rich account of the learning experiences of ELC members. It explores the construction, maintenance and management of the social and learning infrastructure; specifically highlighting the challenges and opportunities inherent in that process in an independent learning community context. It offers insight into inter and intra relationship dynamics and illustrates how these dynamics influence learning development and ultimately learning community sustainability over time.

Practitioners who engage in independent networks and learning groups may benefit from this research study. Core members of the ELC have expressed an interest in the findings and the researcher has agreed to present the findings and recommendations to case community members on completion of the research (as indicated in the researcher terms of reference).

The author will also present the findings in report format to key external stakeholders including Fáilte Ireland; the findings will provide strategic insights that could be maximised at a national level.

This research has already informed the design of Fáilte Ireland's BSc in Small Enterprise Management programme[22] at Waterford Institute of Technology. The potential for an ELC innovation voucher scheme (IVS)[23] to provide developmental support to the core ELC team is currently being explored.

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[22] The RIKON research group at the School of Business WIT has recently developed a BSc in Small Enterprise Management in liaison with Fáilte Ireland and industry experts. This programme was launched in 2010 and takes a problem-based learning approach to develop specific management competencies, in pursuit of enhanced professional practice and increased effectiveness in managing the small and micro tourism enterprise. It is the first programme of its kind in Ireland.

[23] The objective of the Innovation Voucher initiative is to build links between Ireland's public knowledge providers and small businesses and create a cultural shift in the small business community's approach to innovation. Owner/managers of small limited companies can apply for a €5,000 voucher to explore a business opportunity or problem with relevant knowledge providers.

This longitudinal research has revealed a number of specific practical implications, in summary these are:

- Leadership and management structure influence learning and depth of involvement in the ELC. The multiple person core structure is effective in maintaining an action-reflection balance. In this context, the core team need to conduct a roles and skills audit and subsequently a development plan that will maximise the diverse and valuable contribution to ELC learning and practice of the various members. Subsequent succession planning should be conducted to maintain a community level learning agenda and ultimately assist with ELC sustainability.

- Activities that promote engagement are necessary for the long-term survival of the group, a response loop at sub-group level could 'shake up the silence' and capture and share strategies and resources held at individual level. This would lead to deeper involvement and enhanced relationships throughout the wider community.

- Communication and knowledge sharing play a key role in establishing shared meaning in the community. A cyclical communication and knowledge flow is required that circulates knowledge through the individual, sub-group and community level to encourage involvement.

- The research indicates that FLN strategies should incorporate training that support ELC members to transition from the facilitated learning network setting to an independent learning community. While scaled down support was provided for FLN members the year after the Fáilte Ireland TLN programme ended, there was little focus on aspects of sustainable learning community management. This is mirrored elsewhere in the learning network literature,

where there are few examples that incorporate elements of post-facilitated learning network supports. It is recommended that post-facilitation support structures be considered by policy makers and supporting agencies for ELC environments.

Finally, there is potential for the research recommendations to be developed as a blueprint for micro-firm learning community evolution and sustainability, and as such they are of interest to international and national tourism and regional business development support agencies and in particular, LEADER groups, Fáilte Ireland and the Department of Transport, Tourism and Sport in the Irish context. The findings also have international relevance in a micro-business network support context. Considering the challenges that policy makers have in providing support to heterogeneous micro-firms in the tourism sector, they need to be cognisant of the elements and relationships that influence learning in this setting, '*as viewed through the eyes of the small tourism business owner-managers who collectively contribute a significant critical mass within this industry sector*' (Morrison and Teixeria, 2004: 166). Based on the findings of this research study, policy support could be provided without '*constraining the delicate dynamic*' (Thompson, 2005: 151) that sustains the ELC.

As mentioned previously these are not prescriptive actions that will guarantee successful learning and sustainability of the ELC in the longer term, however the findings and refined ELC model (Figure 7.4, p. 241) are in-depth insights, gleaned from an embedded vantage point over a duration that ensured the author could map learning development and learning community evolution.

8.4.3   Proposed ELC model

The refined ELC model (Figure 7.4, p. 241) presented in chapter seven, illustrates individual learning in the ELC and the inter and intra relationship dynamic therein. As such, it may prove useful in explaining the elements and relationships that influence learning within ELCs, and it offers a guideline for learning support in this context.

As far as the researcher is aware, there have been no international or national studies conducted on learning at individual and community level in an independent learning community setting. A greater understanding of the construction of independent learning infrastructures, and the development, maintenance and management of those structures and relationships within, were called for from academic and practitioner domains. This research has answered those calls.

8.4.4   Research approach

The adopted research approach permitted multi-layer analysis (individual, sub-group, community and intra-group) offering internal validation and conceptualisation of inter and intra group dynamics (not just between the sub-groups but also between the ELC and group B). The data richness could only be achieved at this depth of access. Furthermore, the length of the case has enabled insights that could not have been foreseen in a shorter duration or shallower interaction with the ELC, as exemplified in latter contradictions – particularly around the dynamics of 'shared meaning'. These insights demonstrate the value of longitudinal interpretive research in the micro-firm and learning domain (Florén, 2003; Kelliher and Reinl, 2011; Patton et al., 2000; Romano, 1989), as called for in the literature.

The use of units of observation has been a valuable addition to this study and one that could be replicated in other independent learning communities that are likely to have similar individual, sub-group and community level management structures. The value of

the longitudinal case approach and emergent data in the development of theory is also acknowledged, as learning relationships and structures take some time to develop (Halme, 2001; Kelliher and Reinl, 2011).

8.4.5 Summary

As stated previously, despite multiple calls to study micro-firms in their own right (Devins et al., 2005; Kelliher & Henderson, 2006; Matlay, 1999), academic research, which focuses specifically on the micro-firm, has historically been rare. Even with their importance in the context of resource optimisation and small business development established, micro-firm learning networks have been neglected as an area of academic study in the past (for example: Brown and Duguid, 1991; Down, 1999; Devins et al., 2005; Reinl & Kelliher, 2010; Sullivan, 2000). While the literature provides evidence that facilitated learning networks (FLN) create opportunities for higher levels of learning (Florén and Tell, 2004; Halme 2001; Kelliher and Reinl, 2011; Morrison and Bergin-Seers, 2001; Morrison et al., 2004; Tell, 2000; Wing Yan Man, 2007), there is very little known about the formation, maintenance or development of collaborative learning relationships after facilitated structures and supports reach a conclusion (Bessant and Francis, 1999). This research addresses this knowledge gap.

8.5   Research limitations

Due to the nature of doctoral research, there are limitations associated with this study. These have been alluded to in chapter six, and are re-visited now:

- This research has identified issues appropriate for further investigation rather than provide definitive answers with regard to ELC learning.

- In conducting a single case study, the author accepts that this research has been conducted in a particular type of independent learning community, and acknowledges that certain features identified in the findings have greater relevance, applicability and value in the tourism context. However the refined model and many of the model's elements (for example the collective core structure, succession planning and phased learning strategies) are applicable to other independent micro-firm learning community contexts, in other countries.

- Acknowledging that there is no value-free or bias-free design (Janesick, 2000) in qualitative research and that it is predisposed to factors of perception, preconceptions and person values (Yin, 1994), the researcher sought to deal with these issues through a robust research design that incorporated the crystalisation (Richardson, 1994) of emergent findings. Nonetheless, it is appropriate to acknowledge that these issues may represent a limitation in this study, cognisant of this, the author maintained a reflective diary throughout the research process (as recommended by: Cunliffe, 2004; Glaser and Strauss, 1967; Janesick, 2000; Stake, 1995).

- Many of the interviews and conversations were not recorded or directly transcribed, however extensive notes were taken during each encounter and written up in greater detail shortly after each encounter (as recommended by: Fontana and Frey, 1994; Loftland, 1971) for the purposes of optimum recollection.

- This research study and the applied techniques within could potentially be replicable in other sectors, although the anomalies of coopetition, geographical challenges and lifestyle entrepreneurship specific to the tourism sector are duly noted.

- The ELC may be company size (micro-firm) and sector (tourism) specific, however there is potential to widen the research to other independent learning community (ILC) contexts, initially those ILC's comprising micro-firms.

- During the course of this study the ELC evolved from phase one to phase two learning; but the case study did not encompass the observation of phase three evolution, which incorporated the emergence of a multiple person core team. Continued observation of this community would make a valuable contribution to this area of study, within and beyond the tourism sector.

8.6   Recommendations for further research

There are a number of opportunities for future research that have been identified by the author as a result of this research study:

- Research to investigate international differences between ELC's in the tourism sector would be a valuable line of future enquiry. A multi-national comparative study could establish broad environmental differences and similarities and provide insights into the impact that these differences have on learning in the ELC. This would guard against the 'context myopia' that Morrison et al. (2010) called for in tourism research. In this context the ELC model could be used as a basis to explore these differences.

- The ELC may be company size (micro-firm) and sector (tourism) specific, however there is potential to widen the research to other independent learning community (ILC) contexts, initially those ILCs comprising micro-firms.

- This study revealed that a number of community level functions and associated activities including marketing, finance and the use of information technology in pursuit of community endeavours. There is potential to explore these elements further in an ELC context.

- There is potential to study whether skill enhancement can encourage deeper levels of involvement in the ELC. In the literature, little attention is paid to the identification of learning competencies.

- As the CoP literature fails to address movement that is not centripetal there may be value in exploring different forms of learner involvement and development.

- Further longitudinal research in the studied case environment would contribute to this area of study within and beyond the micro-firm setting and tourism context. Specifically, exploration of the multiple person core team impact on ELC culture, structures, resource and less active members warrants further investigation.

- During the course of this study the ELC evolved from phase one to phase two and further research at this stage of the learning community's evolution is recommended. Adopting a multiple case research design to study learning communities at phase two and three of their evolution would be valuable. Specifically, it would be interesting for future research to follow the impact of the changing core structure on depth of learner involvement and whether learning strategies develop at community level under the new structure in the absence of a dominant learning broker at the helm. Succession planning in an independent learning community setting would be a valuable in context.

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Appendix A: Fáilte Ireland Tourism Learning Network programme

Fáilte Ireland's Tourism Learning Network (TLN) initiative was established in 2006 in response to Fáilte Ireland's HRD Strategy 2005-2010, which highlighted the difficulties faced by smaller tourism firms that hinder their access to developmental learning and management development. The key objective of the TLN initiative was learner autonomy that would underpin future co-operative activity and business development in tourism communities.

The TLN programme was designed and delivered by Waterford Institute *of* Technology (WIT) and funded (€2.186m) by Fáilte Ireland to provide a flexible, action-orientated model of learning for SME tourism enterprises. WIT pioneered the development of a HETAC level 6 Certificate in Tourism Business Practice, which has provided an appropriate educational qualification for participants on the programme, with 299 graduating before the programme ceased in 2010. To date, over 550 tourism owner/managers have participated in the TLN programme, which facilitates accessible and relevant training and development for owners of small tourism firms.

A tourism business development plan (TBDP) was utilised in the TLN programme as a learning and business development tool. It covers four key business development areas, that link training and learning on the programme to actionable outcomes in the individual's micro-business. This TBDP is submitted with other key learning documents for assessment of learning and accreditation.

From an education perspective, there is growing credence afforded to the need for academic and training interventions to be based on mutual benefit between educators and entrepreneurs rather than on prescribed training solutions (Deakins and Freel, 1998; Gomez et al., 2004; Kelliher et al., 2009). In the last decade, calls for more flexible, accessible management development programmes (Florén and Tell, 2004; Morrison, 2003; Morrison and Teixeria, 2004) resulted in a number of tourism education initiatives centred on collective learning environments, including the Fáilte Ireland TLN programme. More recently, Fáilte Ireland's Tourism Product Development Strategy (2007-2013: 63) referred to interventions that would encourage "ongoing applied research, support innovation and entrepreneurship in tourism SMEs, and embed a culture of innovation in the tourism industry" (as supported by the NDP 2007-13). Thus, the evolution of tourism education and practice has offered insight into potential collaborative activities between entrepreneurs, TLNs, ELCs and educators, wherein industry-led/education-enabled interventions can equip tourism entrepreneurs with the skills needed to develop a sustainable learning culture. Equally, practice-led research can offer educational institutes insight into applied tourism innovation techniques building a collaborative perspective regarding innovation capability development (Brown and Duguid, 2002; Julien, 2007; Eisenhardt and Martin, 2000). One such research study carried out by the author on the FLN learning environment is detailed below.

Masters by Research Project (2006-2008)

This action research project was carried out over a two-year period and explored micro-firm owner/manager learning in a small-firm learning network in the Irish tourism sector.

Following a comprehensive review of literature, a range of unique features and influences on learning in this environment were outlined. The influence that

involvement in a facilitated learning network has on micro-firm owner/manager learning was considered in order to establish the learning criteria within cooperative learning networks. These were catalogued in a taxonomy of cooperative learning in a micro-firm network environment.

Having derived the micro-firm cooperative learning network criteria, the researcher sought to explore this model in a practical setting. Acknowledging that micro-firms are not a homogenous group (Duhan et al., 2001), particularly in relation to learning (Devins et al., 2005), the researcher focused on a network within a specific sector (as recommended by Roper, 1999) – that of the TLN initiative. The tourism sector was an appropriate environment to study micro-firm owner-manager interaction, as ninety percent of the 16,500 enterprises operating in the sector are micro-firms (Fáilte Ireland, 2004). Thus, the primary research focused on a TLN that was facilitated by Fáilte Ireland and Waterford Institute of Technology in the South and South East region, and this program was the learning catalyst in the context of this study.

Being directly involved in the TLN programme as a research assistant, the researcher adopted an action research methodology in order to explore co-operative learning in a live micro-firm environment. An action research approach captures and facilitates the contextual and collaborative contribution that those involved in the TLN programme can make (Grant et al., 2001; Zuber-Skerritt and Perry, 2002). Observing the network from an 'insider' perspective (Grant et al., 2001; Down, 1999) over a two-year period, the researcher applied multiple data collection techniques (support office and TLN event observation, two focus group sessions, and internal and public documentation review) to capture a range of owner/participant experiences, attitudes, opinions (Patton, 1990) and preferences (Devins et al., 2005). The focus group sessions concentrated on the meaning and value of learning, as expressed by participants in order to enhance the researcher's understanding of the TLN impact on individual and collective learning. A

reflective diary was maintained for the duration of the study (as advised by Herr and Anderson, 2005) in acknowledgement of the researcher's 'dual role' complexity.

Findings suggest that micro-firm owners demand relevance to their own business environment in training interventions and other TLN initiatives. Individual one-to-one sessions are more successful with members that appear more willing to reflect on their learning needs and analyse their business problems, while more action-focused participants appear impatient that solutions are not immediately provided to own business concerns and problems. Over time, network involvement appeared to boost the confidence of participants and they began to think more strategically about their learning needs. Finally, there was growing evidence of co-operative learning and interaction by the end of the formal TLN programme. A key finding of this research is that peer interaction is an important and valuable element of network-centred learning, although owner/managers are unsure of how to successfully leverage this learning resource to their advantage.

The key academic contribution of this research was the development of a framework for micro-firm owner/manager learning in a facilitated learning network environment. From a practical perspective, the framework illustrates several changes that were implemented in the TLN as a result of this study. In a facilitated learning network environment the learning process requires support at key phases. As a result of this finding, a number of key learning resources were amended to ensure clarity, relevance and to permit the owner/manager to tacitly identify learning needs and fully engage in the learning process. Additional time built into learning structures and evaluation procedures to facilitate group discussion and reflection enhanced deeper levels of learning within the community. Several adjustments to learning structures, and reporting and evaluating procedures, facilitated the development of the reflexive practitioner role. A stronger action emphasis was achieved through a number of amendments to key learning

structures and supports, thereby assisting the micro-firm owner/manager in anchoring learning back in their business. Time constraints suggest it is unlikely that follow-up will occur unsupported outside the facilitated learning environment, an issue that stimulated interest in this research study, the overall aim of which is to: explore the elements and relationships that influence learning in Evolving Learning Communities.

Appendix B: Research terms of reference

The researcher made initial contact with a key informant in the ELC by email (see appendix E) and provided an outline of the proposed research study and requested a face to face meeting. Following this contact the researcher met with the informant and discussed:

- The aim and objectives of the research;
- The relevance of the research to the ELC and at national level;
- The importance of access to the ELC in terms of the objectives of the study;
- Confidentiality and trust;
- The proposed depth and duration of the research;
- The level of commitment required from P1 and the group;
- Potential benefits for P1 and the ELC members;
- Data collection guide;
- Cooling off period and date to reply (27th January, 2010).

The researcher also outlined the next steps in the process:

- Clarified any questions or concerns;
- Finalised research terms of reference;
- Clarified background information and questions;
- Identified the ELC members and make initial contact with sample;
- Arranged initial focus group February 2010.

The researcher met with ELC members again in February 2010, to discuss the study in greater detail and to negotiate full access to the case community. The anticipated depth and duration of the research study was also outlined.

Following agreement to partake in the research study, the research terms of reference and cover letter were sent to P1 and the ELC members. The research terms of reference

document has been outlined below (table B1). Individual names have been removed to maintain the confidentially of the case community and its participants. References to the individual case community and individuals situated within, have been replaced with bracketed [..] generic terms.

Table B.1: Research terms of reference

Researcher: Leana Reinl, Doctoral candidate, Waterford Institute of Technology.

Research aim: to explore the elements and relationships that influence individual learning in an ELC, after facilitated learning supports end.

Research method: Primarily observation, supported by semi-structured interviews with FLNM [former learning network members] and OELCM [other evolving learning community members].

Proposed case visits: Twelve visits [2-3 days] over a twelve month period (details provided in the case plan).

Report: Case report to be presented to [the ELC members] in October 2011.

Confidentiality: I will respect confidentiality and recognise incidental events observed during the research period as private. I will not discuss the case details or findings outside of the academic environment without prior agreement from [P1].

As agreed, either party can terminate this relationship should the need arise.

Signed:--- Leana Reinl

Signed:--- [P1]

Signed:---

Date:---

Proposed case plan

Initial site visit: [dates specified in original document].

I will introduce myself as a doctoral candidate researching the learning community as agreed and outlined previously. As a starting point I will need to discuss how the group formed, what the structures are for managing the community and what the key learning events have been since the ELCs inception. I would also like to review any relevant documentation.

ELC meetings: [dates specified in original document].

I would like to attend [general ELC and sub-group A, B and C] community meetings as an observer, to gain an understanding of the development, maintenance and management of the community relationships and structures over time.

Key learning events: [dates specified in original document].

I would like also to visit the case community and observe [2] learning events, with the goal of observing learning relationships and influences.

Appendix C: Pilot study research protocol

C.1 Pilot study research protocol

The case/pilot study research protocol focused on what questions to study, what data were relevant for collection and how to analyse the findings.

Table C.1: Pilot study research protocol

Activity	Description	Timeline
Protocol purpose	The purpose of this protocol is to guide the case study research. The overall aim of the research is to: *explore the elements and relationships that influence individual learning in ELCs, after facilitated learning supports reach a conclusion.* The research objectives are: 1. To explore the construction of the social and learning infrastructure in an evolving learning community (ELC); 2. To examine the development, maintenance and management of the learning relationships and structures in the ELC after facilitated learning supports end; 3. To map the factors supporting and impeding individual learning in the ELC; 4. To refine the learning community model based on the research findings.	
Pilot case study duration	Case: 15 months in total Pilot study: 10 months	January 2010 - Apr 2011 January 2010 - Oct 2010 (10 months intensive and returning over the year long period)
Case selection	The site: An Evolving Learning Community (ELC) comprising a majority of micro-tourism owner/managers. Established by	

process	former learning network (FLN) members. The case: The evolution of individual learning within the ELC. The unit of analysis: Individual ELC learners. The sample: 55 individual ELC learners. Context: Tourism and business environment.	
Case access	Full access negotiated with key ELC members.	January 2010
	Initial discussion with case participants to establish researcher/ELC member rapport.	March 2010
Research instrument	Researcher as the primary research instrument in the application of research methods.	
Research techniques	1. Longitudinal observation at regular intervals; 2. Semi-structured interviews with members of group B participating in the research (guided by an interview protocol); 3. ELC group email communication and updates; 4. Reflective diary (researcher); 5. Internal documentary evidence.	
Data management	Audit trail of data collection methods and process, including control of the research instrument's influence on the studied community.	
Case report	Presentation of key findings to ELC group. Written formal case report to be presented to Fáilte Ireland with agreements from the ELC group.	

Adapted from: Yin (2009)

C.2 Pilot study data collection activities

The data collection activities utilised for the pilot study are tabulated below in table C.2.

Table C.2: Pilot study data collection activities

Technique	Timeline	Technique protocol
Observation	Jan 2010- Oct 2010 10 month pilot	See pilot study observation schedule (Table C.3)
Literature review	On-going process completed in tandem with the pilot study and reviewed upon completion of research.	2009-2011
In-depth interviews/ informal conversations	Every quarter: 1. FLN 2. OELCM 3. Non - ELCM	See pilot study interview schedule (Table C.5)
Reflective diary	Researcher's reflective diary.	2008-2011
Internal document review	Complete review during pilot case. On-going review of ELC communications throughout pilot and validation cases.	On-going
Industry review	Review in 2009 with subsequent review in 2011.	2009/ 2011

C.2.1   Pilot study observation schedule

The importance of studying the community over time and in situ has been outlined in the literature review. Initially, the case duration was set for twelve months but was extended to fifteen months to study the impact of 'the crisis'. A pre-agreed schedule of site visits was agreed (see table below) and likely timescales were discussed.

Table C.3: Pilot study observation schedule

Pilot sub-group B	Activity
Jan 2010	- Introductory visit - Interview with P1
March 2nd/ 3rd 2010	- ELC meeting 1 - Sub-committee (B) meeting 1 - Interview P1 - Informal discussions with various ELC members
March 15th/ 16th 2010	- ELC meeting 2 - Sub-committee (B) meeting 2 - Group interview P1 & P2 - Informal discussions with various ELC members
April 9th/ 10th 2010	- Festival 1: observed event & interactions - Informal discussions with P1 - Informal discussions with OELCM - Informal discussions with non-ELC members
September 1st/ 2nd 2010	- ELC meeting 3 - Informal discussion with P2 & P3 - Informal discussions with OELCM
September 8th 2010	- ELC meeting 4 - Sub-committee (B) meeting 3 - Informal discussions with OELCM & P4
October 3rd / 4th 2010	- Festival 2: observed event & interactions - Informal discussions with P2, P3 & OELCM

An observation guide was developed as a guideline for the researcher. It was revised on an on-going basis, as the researcher's knowledge developed and as the learning community evolved.

Table C.4: Observation guide

Individual Criteria	Individual (Behaviours)
Depth of involvement Opportunities to set goals/ refine practice Negotiation & differences in interpretation Motivation/ desire to participate Requirements from practice Willingness to share knowledge	
Psychological contract Discussions around expectations Inequities in effort and commitment Sense of community	
Learning broker Enabling engagement Enabling reflection Guiding pro-active behaviour Identifying learning opportunities Competence shortfall Stimulate buy-in for external learning relationships Managing conflicting interests Management and maintenance of the ELC	
Learning relationships Evidence of a shared discourse reflecting a common perspective Evidence of trust & asset exchange	

External: Resources/Conflicts/Pressures	
Learning development Ability to leverage resources within the group Ability to access the appropriateness of actions Extent of reflection / action bias Re-generation	
Learning strategies Evidence of a learning agenda Identification of learning opportunities Facilitate learning opportunities Managing conflicting interests Guiding proactive behaviour	
Learning membership & identity Level of participation- Current- movement An awareness of own knowledge, role and contribution An awareness of the knowledge, role and contribution of others Inclusion/ Exclusion	
Learning symbols Existence & creation of LS	
Learning Resources (I/G) Access to learning resources Resource constraints	
Learning support Level & sophistication	
Histories of Learning	
Individual lifestyle factors	
Local manoeuvring	
Sub-unit similarities / differences	
Tourism features	

C.2.2   ELC communications

The vast majority of ELC meetings were held in a participant's hotel and much like Wenger (1998) reported 'coffee break' reflections provided valuable additional insights in relation to the learning dynamic in the ELC, as members continued to discuss ELC issues long after the meetings had concluded. These informal conversations between case participants and the researcher were incorporated into the observation notes and the researcher's reflective diary.

Emails and meeting minutes provided detailed summaries of ELC meeting interactions, agenda items, outcomes and responsibilities. This detail provided a level of comfort, allowing the researcher greater time to observe important learner interactions and developments.

C.2.3 In-depth individual interviews

In-depth interviews were carried out with ELC members at pre-defined intervals throughout the pilot research study as detailed above in the pilot observation schedule (table: C.3).

Table C.5: Pilot study interview schedule

Date	Interview schedule
Jan 2010	Interview 1- P1
Mar 2010	Interview 2- P1
Mar 2010	- Interview 3- P1 - Interview 1- P2
Apr 2010	Informal discussions P1; P2 & OELCM
Sept 2010	Informal discussion with ELC & OELCM
• Oct 3rd & 4th 2010	• Festival 2: observed event & interactions

	• Informal discussion with P2, P3 & OELCM
Oct 19th 2010 **Oct 20th 2010**	• Informal discussions with P1, P2, P3 & OELCM • Interview P3
Nov 2011	Final meeting report to: ELC sample

C.2.4 The interview protocol

The interview protocol was based on the themes emerging from the literature review (Table 4.3, p. 85); it was used as a guideline with other templates and revised on an on-going basis, as the researcher's knowledge developed and as the learning community evolved. Each interview lasted approximately one hour. The purpose of the interview was to capture a diverse range of views on the key themes based on the literature review while still leaving the structure open enough to explore emerging themes as they arose.

C.2.5 Documentary review

A review of in-house documentation included templates, project plans, funding application and brochures.

C.2.6 Researcher reflective diary

The researcher maintained a reflective diary for the duration of the research in addition to the non-reflective observation notes taken on site. The diary was updated following each case site visit.

Appendix D: Validation study research protocol

D1. Introduction

The validation cases were ELC sub-groups identified fulfilling the following criteria:

- A sub-group operating under the ELC umbrella
- FLNM & OELCM representing different learner identities and histories of learning

D.2 Validation Case Research Protocol

The research protocol focused on what questions to study, what data were relevant for collection and how to analyse the findings.

Table D.1: Validation case research protocol

Activity	Description	Timeline
Method	Two concurrent interpretive cases	
Validation case duration	• Case A • Case C	Sept 2010- Apr 2011 (8 months concurrent)
Case selection process	<u>The site:</u> An Evolving Learning Community (ELC) comprising a majority of micro-tourism owner/managers. Established by former learning network (FLN) members. <u>The case:</u> The evolution of individual learning within the ELC. <u>The unit of analysis:</u> Individual ELC learners. <u>The sample:</u> 55 individual ELC learners. <u>Context:</u> Tourism and business environment.	
Case access	Full access negotiated with key ELC members.	January 2010

	Initial discussion with group A & C members to establish researcher/ELC member rapport.	March 2010
Research instrument	Researcher as the primary research instrument in the application of research methods.	
Research techniques	Model validation via two concurrent post-pilot cases incorporating: 1. Longitudinal observation at regular intervals; 2. Semi-structured interviews with members of sub-groups A & C participating in the research (guided by an interview protocol); 3. ELC group email communication and updates; 4. Reflective diary (researcher); 5. Internal documentary evidence.	
Data management	Audit trail of data collection methods and process, including control of the research instrument's influence on the studied community.	
Case report	Presentation of key findings to ELC group. Written formal case report to be presented to Fáilte Ireland with agreement from the ELC group	Aug 2011

Adapted from: Yin (2009)

D.3 Validation case study data collection activities

The data collection activities utilised for the validation studies are tabulated below in table D.2.

Table D.2: Validating case data collection activities

Technique	Timeline	Technique protocol
Observation	1. Group A 2. Group C Sept 2010- Apr 2011 (8 months concurrent)	See validation study observation schedule (table)
Literature review	On-going process completed in tandem with the pilot study & reviewed upon completion of research.	2009-2011
In-depth interviews/ informal conversations	Every quarter: 1. FLN 2. OELCM 3. Non - ELCM	See validation study interview schedule (Table D4)
Reflective diary maintenance	Researcher's reflective diary.	2008-2011
Internal document review	Complete review during pilot case. On-going review of ELC communications throughout pilot and validation cases.	On-going
Industry review	Review in 2009 with subsequent review in 2011.	2009 - 2011

D.3.1 Observation schedule

The importance of studying the community over time and in situ has been outlined in the literature review. Initially, the case duration was set for twelve months but was

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extended to fifteen months to study the impact of 'the crisis'. A pre-agreed schedule of site visits was agreed (see table D.3 below) and likely timescales were discussed.

Table D.3: Validation case observation schedule

Validation sub-groups A and C	Description
April 9th/ 10th 2010	• Festival 1: observed event & interactions • Informal discussions with OELCM • Informal discussions with non-ELC members
September 1st/ 2nd 2010	• ELC meeting 3 • Informal discussion with P4, P5, P6, P9 & OELCM
September 8th 2010	• ELC meeting 4 • Community meeting 1 • Informal discussions with OELCM
October 3rd / 4th 2010	• Festival 2: observed event & interactions
October 19th / 20th 2010	• AGM • Individual interviews (P4, P5, P6, P9) • Informal discussions with OELCM
March 2011	• Clarification interviews with P8 & P9 (telephone)

D.3.2   ELC communications

As time passed, and the researcher became increasingly familiar to the ELC members, the 'coffee break' reflections and informal conversations revealed greater insights in relation to the learning dynamic in the ELC. Members continued to discuss ELC issues long after ELC meetings had concluded. These informal conversations between case

participants and the researcher were incorporated into the observation notes and the researcher's reflective diary.

Emails and meeting minutes continued to provide detailed summaries of ELC meeting interactions, agenda items, outcomes and responsibilities. In particular, communication activity increased during and shortly after the crisis.

D.3.3 In-depth individual interviews

In-depth interviews were carried out with validation members at pre-defined intervals throughout the research study as detailed below in the interview schedule (table: D.4).

Table D.4: Validation case interview schedule

Date	Interview schedule
Apr 2010	Informal discussions with P9, P4, P5, P6 Informal discussions with OELCM & non-ELCM
Sept 2010	Informal discussions with ELC & OELCM
Oct 3rd 2010	Informal discussions with P3
Oct 19th 2010	Interview P9, P4, P5, P6 Informal discussions with P1, P2, P3 & OELCM
Oct 20th	Interview P3
Mar 2011	Final clarification interviews P9, P7 & P8
Nov 2011	Final meeting report to: ELC sample

D.3.3.1: The interview protocol

The interview protocol was based on the themes emerging from the literature review; it was used as a guideline with other templates and revised on an on-going basis, as the researcher's knowledge developed and as the learning community evolved. Each

interview lasted approximately one hour. The purpose of the interview was to capture a diverse range of views on the key themes based on the literature review while still leaving the structure open enough to explore emerging themes as they arose.

D.3.4   Documentary review

A review of in-house documentation included templates, project plans, funding application and brochures.

D.3.5   Researcher reflective diary

The researcher maintained a reflective diary for the duration of the research in addition to the non-reflective observation notes taken on site. The diary was updated following each case site visit.

Appendix E: Communication

Good afternoon ███████,

███

You may remember when you started the ██████ programme in 2006 I was beginning my Masters study based on learning in the network, which I have now completed. As a result of the research findings some changes were made to the TLN programme to further support and enhance the learning of participants.

I have been keeping up to date with the progress of some of our former participants, and groups such as █ have inspired me to explore learning in groups that have evolved from the ████████████████████████████ for my PhD study. I am hoping that you would be willing to assist me in my research and that this study will be mutually beneficial for us both.

I have discussed the study with ██████████████ and informed ███████ and ██████████ of Fáilte Ireland, each of whom are excited about the research and I have also gained support from Waterford Institute of Technology to proceed with the study.

Obviously I am aware that you would need further detail about the research project. I will follow up with a phone call during the week regarding this request and I would be delighted to give you a brief outline of what the research would entail. If you would email me with a day and time that would be convenient for you to have a chat about the research, I can speak to you in further detail.

All the best,

Leana

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Appendix F: Coding structure

Each of the case sub-groups were coded as follows: pilot group A and validation cases B and C. Each participant was assigned a numerical code. Table E1 below outlines the case participant codes for the main research sample (P1-P9) and their respective sub-group (UOO) code.

Table E1: Research participants

Participant Code	FLN Member	Sub group
1.	Y	B
2.	Y	B
3.	N	B
4.	Y	A
5.	Y	A
6.	N	A
7.	Y	C
8.	Y	C
9.	N	C
10-55.	Vast majority were non-FLN members (40+)	Vast majority did not have a formal role on the ELC sub-committees (35+)

Appendix G: NVivo research theme development

Free Nodes

	Name		S	H	C	C	N	N
○	Boundaries							
○	External impulses							
○	histories of learning							
○	lifestyle factors							
○	local manoeuvering							
○	power							
○	RBV influence on practice							
○	Regulatory pressures							
○	Rural tourism features							
○	sub-unit similarities & differences							
○	The Australian journalist (Richard) had							
○	The way things are done							

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Tree Nodes

Name

- Depth of Involvement
    - Individual level of skill and ability
    - motivation for involvement
    - Negotation & differences in interpretation
    - Opportunity to refine practice
    - reflection on practice
    - requirements from practice
    - sense of belonging
    - willingness to share individual know & prev experience
- learning broker role
    - competence shortfall
    - enabling engagement
    - enabling reflection
    - encouragement
    - guiding pro-active behaviour
    - id learning opportunities
    - identifying and managing activities, tasks and roles
    - influence on practice
    - management of external learning relationships
    - managing conflicting interests
    - managing expectations
    - new members
    - promotion of the group
- learning development
- learning devt
    - ability to assess the appropriateness of actions
    - ability to leverge resources for learning
    - action bias
    - aware of know skills limitations
    - extent of reflection
    - movement towards the centre of practice
    - re generation
    - showing the ropes
- Learning membership & ID
    - Awareness of own knowledge, role & contrib
    - Awareness of role knowledge & contrib of others
    - external face
    - Inclusion & Exclusion
    - level of participaion
    - movement
    - shared meaning
- Learning relationships
    - conflict

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Tree Nodes

Name
dependency on the collective
evidence of trust and resource exchange
− external realtionships
conflicts
Information flow and activity
resources
− Psychological contract
expectations
inequities in effort and commitment
sense of community responsibility
shared meaning and mutual engagement
shared repetoire of resources
− learning resources
collective bargaining power
external learning resources
financial resources
resource constraints
− Learning strategies
Evidence of a learning agenda
facilitate learning
ID of learning opportunities
managing conflicting interests
mapping knowledge and skills
orchestration of pro active behaviour
− Learning symbols
Existence and creation of symbols

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Appendix H: Reflections on using NVivo

During this research the author used QSR NVivo 8 in the data management and analysis process. The advantages of using NVivo as a data analysis and management tool include:

- A wide range of source material can be imported, coded and tagged with comments and observations;

- Having created nodes (themes) and initially coding each data source, observations or comments permit the researcher to map out the concepts and the relationships between them;

- In NVivo, each theme can be represented as a node, with sub-nodes forming a hierarchy. The software also permits the researcher to develop 'free nodes' until data analysis reveals how these free standing themes relate to other themes in the research.

- Researcher observations or interpretations can be linked to developing themes through the memo function; this function of the software permits the researcher to see all related sources together but also to step back into each individual source to check the wider context of the data;

- NVivo offers visual as well as textual ways to present data;

- As themes developed and changed frequently over time the importance of maintaining clear node summaries that provide an outline of what the theme is about and memos to remind the researcher how the themes develop over time is good practice;

- NVivo allows the researcher to ensure that the theoretical ideas which have emerged in the coding process can be systematically evidenced in the data. It is easy to see the importance of individual nodes and sub-nodes.

The advantages of using NVivo data analysis software outweighed the disadvantages in this research study, however among disadvantages to note are:

- During the latter phases of data analysis, it became more complex to crystalise the data and having coded all the relevant data in to each node to the point of saturation, the researcher had to pull the content back out into a Microsoft word

document to refine and write up the findings. For example, the spell check function does not work in NVivo memos;

- Substantial training is essential to understanding the software, even with this training it is a steep learning curve;

- The disadvantages of using NVivo include the length of time it takes to set up the nodes, input and code the data;

- Because the NVivo programme is live node summary report must be saved or printed before changing the nodes themselves, moving sub-nodes from one node to another or changing the hierarchical structure of nodes. Based on the researcher's experience this is likely to happen frequently, and printing the node summary report at regular intervals as the research study develops is time consuming. The importance of maintaining a record of theme development over time can be easily overlooked.