Project learning relationships and situated learning: defensive deflection and protective veneers

Andrew J. Sense

School of Management and Marketing,
University of Wollongong,
Wollongong, NSW 2522, Australia
Fax: +61-2-42-272-785
E-mail: andrew_sense@uow.edu.au

Abstract: This paper contributes to better understanding the dynamics of practically supporting the knowledge creation processes within a project management setting. Based on a longitudinal participative action research study of the dynamics of situated learning in a project case study involving organisational change, this paper describes and theorises about how the ‘learning relationships’ between project team participants significantly impact situated learning activity within a project team setting. As observed in the case study and then argued in this paper, through project team participants systematically and publicly exploring and communally reflecting on this sociological element (amongst others identified in this study), they aid their situated learning processes and incidentally, help develop their competency in ‘learning how to learn’.

Keywords: project situated learning; learning relationships; sociological elements.


Biographical notes: Andrew J. Sense is a Senior Lecturer at the School of Management and Marketing, University of Wollongong, Australia. In addition to being responsible for an extensive teaching portfolio of management subjects (primarily involving project, operations, quality and innovation management), he researches and publishes in the fields of project management, supply chain management, organisational learning, innovation and change management and research methodology. He also possesses senior managerial manufacturing and project management experience of 18 years in Australian manufacturing industry where he led major organisational change initiatives. His recently completed research in understanding the dynamics of situated learning in the project based environment has received awards for excellence from Macquarie University Australia and from an industry professional association representing professional project managers in Australia. Currently, he is developing a book on cultivating learning within projects.
1 Introduction

Project participants’ ‘interrelating’ involves them in learning processes of sense-making, observations, conversations and dialogue within a temporal project team practice. The explicit and implicit social relationships between ‘interrelating’ people form the conduits upon which these various types of learning processes are enabled. For example, Baker (2002, p.166) asserts that, “At the heart of conversational learning is social, relational learning among people who each have experiences and ideas that become vital resources for new possibilities yet to be discovered”. Concomitant to those perspectives is the recognition of the importance of building relationships to facilitate such learning (Bryans and Smith, 2000, pp.228–235).

A number of authors in the project management field (For examples, see Boddy, 2002, pp.135–156; Briner et al., 1996, pp.114–116; Gido and Clements, 2003, pp.324–335; Frame, 1995, pp.53–82, 1999, p.8; Keeling, 2000, pp.107–110; Pinto, 1998, pp.27–42; Pinto and Millet, 1999, pp.119–133; Posner and Kouzes, 1998, pp.252–253; Verma, 1995, p.11) also stress the importance of building effective formal and informal working relationships in projects, because people in project teams necessarily engage multiple interested stakeholders at multiple levels (even without formal authority) to effectively manage a project. For example, Posner and Kouzes (1998, pp.252–253) suggest that the most important relationships for learning in projects involve mentors, immediate supervisors and one’s peers, that is, stressing both the importance of having effective working relationships and the learning value gained from the more immediate and situated working relationships one has with colleagues. Briner et al. (1996, pp.114–116) emphasise the value in consciously building informal networks to help manage the external project team image and to harness the resources and support needed to deliver a project. Some researchers have specifically identified that the establishment and fostering of these informal learning relationships most significantly aids project learning activity. For example, in a study of learning across projects by Keegan and Turner (2001, pp.92–96), their respondents claimed that the informal networks within their companies were the most important conduit for transferring learning between individuals and project teams. Those respondents also posited that their informal networks required deliberate attention and nurturing to ensure and to enhance the strengthening and the speed of their learning and development processes.

Whether it is formal or informal, the interaction between people is essential in knowledge creation, in knowledge diffusion and in providing a powerful avenue for ‘tacit’ knowledge to be socialised and articulated – as espoused for example, in the work of Nonaka and Takeuchi (1995). Smith (2001, pp.311–321) claims that such ‘tacit’ knowledge exchange is reliant upon relationships which are open, friendly, unstructured and that allow for spontaneous sharing of knowledge. To achieve those types of relationships where both tacit and explicit knowledge is readily shared and new knowledge created, requires as Swan et al. (1999, pp.271–273) suggest, “…an investment in interpersonal interrelationship building, so that those involved can make sense of and envisage the broader goals of the system”. This opportunity to access and share tacit knowledge residing within participants in a project team provides a further important stimulus to better understand and build the learning relationships between them.
The following reflective quotation from a participant involved in the study which underpins this paper, illustrates the complexities involved in seeking to better understand and build the learning relationships between project participants:

“I think our team isn’t comfortable with silence where they can think about how things are impacting upon them or ask, “What’s my learning from this?” What actually often happens is a reflection will be made about a certain relationship dynamic and one of the guys will say, “that happens in the other project team and you can see it in the example of blah, blah, blah”. They take the energy away from the opportunity to improve their own relationships by looking at the issue in something that’s not attached to them personally. I think they can really move this project and their learning forward if they can actually spend time thinking about, “how does that impact on me?” … “What does that mean for me personally?” When I can actually hear their conversations using words like, “for me”, or “in my experience”, or “honestly in my opinion” … then when that happens that will be a real milestone.” (Project team participant)

As well as serving as an illustration of some of the learning activities of the project team involved in this study, this quotation highlights three important points. Firstly, this participant recognised defensive behaviour in her colleagues in the project team when they confronted issues about their own learning relationships. Secondly, these comments indicate that the project team participants were exploring some rather difficult socio-cultural issues around their learning. Thirdly, this exploration through their socio-cultural milieu during the course of their team meetings included deep personal reflections on their team learning processes and on their own learning behaviours. Coupled to the broader arguments concerning the importance of building project learning relationships, these reflections serve as a catalyst to explore and speculate upon how relationships between project team participants might impact their situated learning activities and on how those participants might collectively and constructively deal with these complex issues. In this study, these ‘learning relationships’ are defined as, “The relationship one has with another person/s from which one acquires or imparts knowledge or skill to increase one’s capacity to take effective project action” (Sense, 2005, p.249).

Based upon the project case in which these issues were explored, this paper provides an empirical insight into how the ‘learning relationships’ between project participants can constrain or support situated learning in a project team setting. Thereby, this paper makes a contribution to better understanding the dilemmas of practically supporting intra-project knowledge creation and sharing and also addresses a gap in knowledge in the project management and organisational learning literatures about the dynamics of situated learning in project contexts. Specifically, this paper identifies and discusses two conditioners of participants’ learning relationships and argues that project participants must directly and communally engage with this ‘learning relationships’ element if they seek to enhance their participation, interaction and learning exchanges – thereby stimulating their situated learning processes within a project. En-route to those outcomes, the following section of this paper outlines the theoretical framework of this study and the section that follows then describes the research methodology employed and the study context. The next section of this paper then weaves together relevant theory and illustrative empirical examples from the case study to elaborate upon how issues within the project participants’ ‘learning relationships’ impacted their situated learning activities.
2 The theoretical framework

An article by Sense (2003), which expounded the importance of developing a deep understanding of the learning phenomena within projects, also offered a new conception of a project team from a learning perspective, which took account of this learning relationship dynamic. That conception was built upon situated learning theory and its construct of a ‘community of practice’ (Brown and Duguid, 1991; Lave and Wenger, 1991; Saint-Onge and Wallace, 2002; Wenger, 1998; Wenger et al., 2002) wherein, the context and its myriad sociological aspects mediate the cognitive learning activities of an individual and are therefore an integral part of the learning or knowledge creation process (Antonacopoulou, 1997, p.6; Gherardi and Nicolini, 2000). The situated dimension of learning is concerned with the practical and social aspects of learning within a context and a ‘community of practice’ involves a group of people who share a concern, a set of problems or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis (Wenger et al., 2002, pp.4–5). As Wenger et al. (2002, pp.4–5) note, “Communities of practice are everywhere … we belong to a number of them at work, at school and in our hobbies” and they make knowledge an integral part of the day-to-day activities and interactions where community members serve as a living repository for that community knowledge.

Situated learning theory presumes that most learning occurs on the job in culturally embedded ways, and it therefore evolves through the participation and interaction of people and their collective sense-making activities as they develop their competencies and construct their identities to function effectively within a community or domain of practice (Brown and Duguid, 1991; Cook and Yanow, 1993; Dixon, 1999, pp.43–62; Gherardi, 1999, p.112; Gherardi and Nicolini, 2000; Lave and Wenger, 1991; Wenger, 1998; Wenger et al., 2002). Also, this situated dimension of learning always frames the cognitive dimension or as Gherardi et al. (1998, p. 274) state, “cognitive and practical activity can thus be pursued only within this world, and through this social and cultural network”. By implication, attending to the sociological aspects of a situated learning context is important in positively assisting the entire learning process of individuals. Therefore, this situated perspective encourages us to understand project learning and behaviours and actions through the experiences and interactions of project participants in which individuals make sense of their project activities (Schwandt, 1994, p.118; Thomas, 2000, pp.25 and 42). Thus, the ‘reality of learning’ in a project team environment can be considered constructed, maintained and reproduced through human practices within the project social context.

Consequently, this new conception of a project team from a learning perspective (Sense, 2003) posited that project teams are not just groupings of independent persons operating and learning independently of each other or independently of external influences. Instead, project teams are social constructs that involve participants in multifarious forms and levels of interaction and participation with each other while simultaneously being members of multiple ‘communities of practice’ external to the project team setting. In that way, a project team represents an embryonic form of a new ‘community of practice’ (Sense, 2003). Participants’ membership of these other multiple ‘communities of practice’, means that these ‘communities of practice’ collide or abut each other within the project team setting and this is where major learning and negotiation opportunities emerge. At these points of abutment or engagement, situated
learning can be impeded or supported by sociological elements within the project milieu. This paper elaborates upon one sociological element impacting project situated learning activity, which is part of a group of five such elements that have been identified through the work of this study. This sociological element, that is, ‘learning relationships’, is interpersonal in character and either assists or impedes the learning exchanges or creation to occur across these project participants’ multiple ‘communities of practice’ boundaries within a project setting. In that way, ‘learning relationships’ within a project setting can be considered primary moderators of project participants’ situated learning behaviour and therefore require deliberate and systematic practitioner attention if one seeks to improve project situated learning activity.

3 The research method and study context

Underpinning the findings presented in this paper is a qualitative and longitudinal participative action research study of project-based learning, which engaged a case involving an active project team pursuing an organisational change project. An action research methodology has a simultaneous focus on developing practical social change and in developing and refining theory. It also targets both individual and group levels to prompt such social change and has an expansive focus on individual learning. Participative action research (as compared to other forms of action research) has a predominant emphasis on genuinely involving and researching with the participants of a community (as co-researchers) and where reflection and continuous learning is an explicit collective activity. This methodology presented a number of advantages for investigating learning in this case study context. It provided participants in this case study multiple opportunities to become self-critical, to learn, to ‘learn how to learn’ and to develop ownership and empowerment of the research process, which helped further fuel the inquiry activity. It also provided the opportunity for them to safely (relative to the organisational cultural condition), collaboratively and honestly explore learning in their project, so that valuable individual tacit knowledge was exposed and shared. Consequently, this participative action research methodology employed, provided a broader (as in number of participant investigators) and deeper (as in the cooperative opportunity to source rich data) insight into the real sociological influences impacting learning in this project team case. For a more detailed discussion of the participative action research methodology employed in this case, see Badham and Sense (2001) and Sense (2005). Empirical data was accumulated over 18 months through undertaking multiple observations of, and through participation in, project team meetings and reflection sessions; serial semi-structured interviews and feedback sessions with the project team participants; serial ‘learning workshops’ facilitation, and; documentation reviews.

The study was conducted in a heavy industrial engineering operation in Australia that processes coal into coke for use in the local blast furnace or for export. The continuous operation involves approximately 400 employees and is a relatively large capital intensive and people intensive operation within the integrated steelmaking operations on the site. In June 1998, a new plant manager transferred to the plant with strong workplace culture change credentials from his work at two other plants within the same company. With the recognition that there was a charter for change developed within the broader organisation, the new manager set about to initiate processes to re-design the
organisation of the plant. That goal was pursued in a context of competition from cheap overseas producers and alternative technologies, pressures from the community and the government to dramatically reduce environmental emissions, and a need to involve a workforce that had traditionally held a low self-image and a low trust in management.

Within the operation, the primary method engaged by the plant manager to establish sustainable change throughout the plant had been the creation of a number of ‘learning forums’ operating at senior management, middle management and shop-floor levels, as well as cutting across those levels. These forums had been developed to work within the vision, mission and values that had been more or less imposed by the new plant manager and senior management in the company. However, the forums had a purposeful and strong emphasis on ongoing individual and organisational learning as a means to promote, consolidate and sustain change. One of these forums or project teams, which became the project case study, was the ‘Cokemaking Leadership Team’ within the plant. This team had a brief to redesign and integrate their roles in alignment with the new organisational vision and values. Their explicit aims for this complex organisational change project were to: redefine their roles and relationships; practice new leadership skills, and; learn and to ‘learn how to learn’ throughout the project process. This project team initially consisted of three core senior manufacturing management personnel (later expanding to 15 members). The learning behaviours and activities observed and experienced by these three core members of this project team (i.e. Ken, Ted and Anton) provide the rich empirical data supporting the findings from this study.

4 How did the learning relationships exhibited in this project case constrain or support situated learning?

The learning relationships impact on the situated learning activity of project participants involved in this study, is best addressed through an elaboration on the two empirically derived ‘conditioners’ of those relationships. These ‘conditioners’ either challenged and changed or reinforced the participants’ current learning relationships within the project and consequently, were primal influences on the observed learning behaviours of the participants. These conditioners involve:

- attitudes to public exposure and public scrutiny of perceived personal matters and
- preparedness to explore one’s learning relationships with others outside of the existing relationship frameworks and viewing relationship problems as major learning opportunities.

As evidenced in the discussion to follow, a learning relationship conditioner that tended to constrain situated learning processes involved the project team participants’ not wanting one’s performances/failings/beliefs/fears/weaknesses to be exposed to one’s peer group or oneself for public scrutiny. This conditioner resulted in the project team participants exhibiting ‘defensive deflection’ onto other ‘victims’ and in shoring up their own protective veneers (i.e. applying strategies to avoid such discussions) in case of future attack. In over 36 project-team meeting sessions and during semi-structured interviews or learning workshop activities, these situations were observed at every meeting event. That being, at those events, at least one and sometimes more of the participants would demonstrate some form of defensive behaviour.
In contrast, a ‘learning relationship’ conditioner which tended to aid situated learning between the project participants, involved the team’s preparedness to actively explore new relationship frameworks contrary to existing models and in so doing, they viewed relationship problems not as problems to be quickly solved but rather, exploratory learning opportunities. Henceforth, this conditioner offered challenges to, rather than reinforcement of current relationship frameworks that limited new learning potential, and encouraged different attitudes and approaches towards coaching and mentoring of colleagues.

4.1 Attitudes to public exposure and public scrutiny of perceived personal matters

At first glance, one might question the necessity to publicly expose and scrutinise aspects of one’s behaviour in a project team, particularly when the usual focus in a project team is primarily concerned with completing a major task within time constraints. However, if project participants begin to value ‘learning and creating’ as much as ‘task’ completion within project contexts then they will appreciate the value in exploring the deeper dimensions of their individual and collective behaviours (Raelin, 2000, p.78). Such an appreciation and acceptance of the value of learning in projects provides the overarching internal stimulus for participants to ‘want’ to build their learning relationships and explore their behaviours. Any exploration of project participants’ learning behaviours involves them in providing and accepting positive and negative feedback, dealing with internal and external politics, negotiating with others and publicly testing individuals’ espoused values and beliefs (Raelin, 2000, p.122). These processes involve confrontation with defensive routines, which has parallels at the organisational learning level.

At the organisational level, Argyris (1990, pp.25–44) states that his Model 1 governing values (i.e. unilateral control, to win and not lose, to suppress negative feelings and a focus on action strategies) lead to organisational routines involving deflecting or avoiding embarrassment or threat, wherein, learning opportunities are stifled. For example, a team member may deflect, disengage or fail to initiate team discussion on issues where they have failed to complete their designated project task or when they feel less competent or confident about a project topic and do not wish to compromise their perception of their reputation with colleagues in the organisation. Organisational defensive routines are therefore anti-learning, overprotective and self-sealing. Failure to discuss these defensive routines means they will continue to proliferate and when they are discussed, the individuals involved may get in trouble (Argyris, 1990, p.30). The result being, that the defensive routines are protected and reinforced by the people who prefer they do not exist. This protection is covert and undiscussable and these defensive routines force people to take actions to achieve political and task goals via circuitous relational routes rather than directly dealing with the issue and people concerned – which in turn, reinforces or ‘shores up’ the defensive routines which caused the situation in the first place (Argyris, 1990, pp.30–34). Organisational defensive routines make it highly likely that individuals and groups will not detect and correct errors that are embarrassing and threatening because the fundamental rules are to bypass the errors and act as if they are not being done, and, make the bypass undiscussable, and make its undiscussability, undiscussable. Argyris (1990, p.43) further suggests that attempting to engage these defensive routines for
reflection and to reduce them only activates the defensive routines and strengthens them. Nevertheless, in such a situation can participants afford to retreat from this challenge? As exemplified in this study, participants really have no choice but to systematically confront these defensive routines otherwise they remain locked into a pattern of systemic ignorance, limited change and limited learning. In that sense, they need to be cognisant of the initial responses or challenges to reflection within such defensive routines, and continue to ‘push’ the issues, wherein, they test their own endurance and perseverance in pursuit of learning. Therefore, at the level of the project team, not to deliberately confront these defensive routines only perpetuates the existing conundrum and in the project team of this study, would have defeated the very goal of achieving significant learning and organisational change. These confrontational dilemmas are illustrated by Ken (from the project team case) when he commented,

“… So getting some of those ‘undiscussables’ out is really where the barrier is, and I suppose it’s been quite a deliberate exercise to get to know each other a bit better and become more confident to share and be more confident to know how to share some of these ‘undiscussable’ things.”

In the project team involved in this study, confronting difficult relationship issues and defensive routines was therefore a fundamental activity of the project process. Learning within this project team situation was reliant upon the participants’ willingness to admit mistakes or deficiencies in their actions, to engage conversation about those issues and subject themselves and their experiences to the constructive criticism of their peers. Yet, as Raelin (2001, pp.17 and 24) noted, not all people in all settings have such a psychological (and organisational) security to undertake such reflective practice, since such public reflection would place participants in a ‘vulnerable state’. In highlighting this hesitancy to exposing one’s own deficiencies or vulnerabilities, one participant (Anton) during the first research cycle offered,

“I am pushing myself outside my familiar comfort zone [to discuss my deficiencies] – and I am trying not to jump off the cliff without a parachute. Moving from my ‘old’ job to my ‘new’ job [with its expectations] is hard.”
and, “We seem to have, for whatever reason, shied away from actually looking at our roles and perhaps thinking about how could we do things differently.”

Such an inwardly focused communal discussion on their roles might mean the possible exposure of one’s own deficiencies or perceived weaknesses – despite the opportunity for learning. To avoid that risk of exposure (later acknowledged by the participants), the participants practiced a process of what the researcher termed, ‘defensive deflection’. This term encapsulates both Argyris’s (1990, 1993, 1999) extensive commentary on defensive reasoning and defensive routines and the researcher’s observations of these project participants – which revealed that they did more than just seek to avoid the examination of their own behaviours and the testing of their mental assumptions and conclusions drawn (Argyris, 1999, p.232). These participants also regularly deflected their discussions/reflections on difficult relational issues onto others or other groups, when they did not wish to evaluate themselves and their own learning actions/behaviours. Therefore, this term of ‘defensive deflection’ more eloquently reflects the observed defensive behaviour experiences of the participants in the project team examined in this study.

As part of their individual interview and feedback sessions and also during the feedback sessions with the full project team, the core participants in this study were introduced to this ‘defensive deflection’ term. They seemed to readily comprehend
and accept that this was a significant issue for them in their learning activities. Ken surmised that he felt defensive deflection was culturally entrenched in the organisation by stating,

“Defensive deflection is a behaviour that exists fairly deeply and is probably largely unconscious I suppose, whilst I am working within my tangible comfort zone. One general observation that has been made about the three of us and the Cokemaking Leadership Team too … is around avoiding tough discussions [particularly around non-rational issues] … one of the avoidance mechanisms is often that deflection … I suppose that’s a behaviour which comes back at us in other parts of the organization … for example, We’re the best shift … its the maintenance people and the other shifts that muck us up.”

At the organisational level, Argyris (1990, p.34) also noted this process where individuals learn to distance themselves from feeling responsible for creating defensive patterns – it becomes the other people who are at fault. In avoiding discussion of the project team’s own relationship issues, Ted offered his observations of another project team’s barriers to their learning relationships, by suggesting that, “They should be in the plywood business given the amount of veneer abundant in the working party process’. The implication being that the team he observed had layers upon layers of barriers to learning within their relationships. With this comment, he momentarily deflected the attention of his peers in this project team onto another group’s relationship issues, which prompted their active dialogue on what were their perceptions of that other project team within the organisational change program. All these avoidance actions are in alignment with what Argyris (1999, p.130) describes as how professionals avoid learning, that is, professionals use their criticisms of others to protect themselves from the potential embarrassment of having to admit to their responsibilities in the less than perfect outcomes achieved. Ken noted in one of the very first ‘learning workshop’ sessions, “Defensive deflection is probably one of the strategies we will all use. As you have discovered, purposeful deflection is one of our strong points”. At that time, Ken’s comment strongly reflected his feeling that the team still did not have robust learning relationships in which they felt confident to freely exchange views and to publicly reflect on their difficult relationship issues.

Furthermore, the willingness and opportunities for participants to ‘expose themselves’ to their peer group and to explore new relationship frameworks, was also affected by their heavy involvement in, and responsibilities for activities of the broader organisational change program and daily operational activities. Consequently, during the earlier activities of the project team, the participants’ application to building their learning relationships was a more responsive and opportunistic activity rather than a systematic and planned action. As Ted noted, “We were trying to do things differently in developing the learning relationships but it was done by the ‘seat of the pants’ rather than by a cunning plan with everything falling into place”. Some commentators might suggest that taking such an opportunistic approach to developing their learning relationships is perfectly satisfactory. However, a ‘seat of the pants’ approach fails to adequately address or create the conditions necessary for optimising learning and learning development within any specific project context. In short, opportunistic responses are useful but should be embedded within a strategic and purposeful approach to learning. Consistent with Ted’s comments above and reflecting participants’ ‘other responsibilities’, while also illustrating their defensive deflection, is a remark made by Anton during an interview session,
“I would have to say that more recently we haven’t done a lot of learning together and I suppose that is probably because there’s been a fair bit of transactional [operational] type stuff that we have been working on, … therefore, we really haven’t gone back and talked about ourselves, it’s more been about other groups and getting things done.”

In the view of these participants, particularly in the early stages of this study, attending to issues in the organisational environment, seemed to take some priority over purposefully and systematically attending to the processes concerned with developing their learning relationships – despite the explicit project goal of redefining their relationships. Hence, despite these organisational environment conditions encouraging these project participants to personally and recurrently engage with each other, these organisational environment commitments actually helped limit the occasions for project participants’ to attend to their learning relationship development processes and provided avenues or targets for individuals to more readily ‘defensively deflect’.

In contrast however, and potentially aiding their learning relationship development, was the participants’ collective view that they felt this organisational environment and their project was disorderly, threatening to them professionally and personally and difficult to analyse and plan for. Partly in response to those perceptions and coupled to other stimuli, they appeared to strongly prefer to exchange project information through personal contact rather than through codified media such as e-mails, phone calls or paperwork. Their actions seemed to mirror a proposition by Daft and Weick (1984, p.290) that if one’s perceived external environment is less analysable, the greater the tendency for managers to use external information gained from personal contact with other managers. This perceived condition of the organisational environment simply encouraged these project participants to personally engage with each other and therefore, helped establish recurrent opportunities for them to collaboratively expose and scrutinise their behaviours and modify their learning relationships.

Given all those issues outlined above, the project team participants in this case took many project meeting sessions to progressively recognise, reflect upon and move steadily away from this avoidance approach towards constantly addressing aspects of their own learning relationships. For example, half way through the project Ken expressed his concern on this matter by stating,

“I can walk around the room and still see individuals who look like there’s something going on, but even when you challenge them, it is very difficult to get out what seems to be an honest and complete response … and that’s probably still impeding learning progress.”

Anton rationalised his actions in this respect by suggesting,

“I generally tend to operate in a very rational way. However, I think I am able to actually get into the non-rational issues more now than I used to and we’re going to have to spend a lot more time in the non-rational area talking about how people are feeling about things and what are the individual jobs that they’d like … I suppose I’ve seen the group move closer together but I can also see that we’ve got a fair bit more of that to do before we decide what the Cokemaking Leadership Team looks like and how it operates in the future.”

The project sponsor would likely have concurred with Anton’s last reflection and in one project team session, asked the team what it would take to get them to emotionally engage with their workforce. He then expressed that he felt,
“There is a fantasy world out there about what our physical world will look like but what is of interest to me is how people behave emotionally, … How do you build trust without the emotional connections with people?”

His comments reflected his relentless crusade to motivate these participants to focus their energies on developing their immediate peer group relationships and also improve their relationships with other parties throughout the broader Coal and Coke organisation. His comments also further illustrate the level and intensity of the conversations conducted between the participants in this project team around this learning relationships element.

4.2 Preparedness to explore one’s learning relationships with others outside of the existing relationship frameworks

The exploration of, and challenge to existing relationship frameworks, was a strategy that the project team in this study very actively pursued, since they sought to develop their relationships to a new level of trust, openness and emotional engagement. Their actions mirrored Argyris and Schön’s (1978) Model II type approach to organisational learning, wherein, existing mental models and governing variables are challenged. In that process, double loop learning results from individuals confronting their basic assumptions behind their views of others (often involving difficult and sensitive matters) and inviting public confrontation and exploration of their assumptions (Argyris and Schön, 1978, pp.130–141 and 60–65; Schön, 1987, pp.258–259). Double-loop learning assists new knowledge creation and discovery, aids the development of skills in ‘learning how to learn’ and to develop ways for people to behave differently within their learning contexts (Argyris and Schön, 1978, p.140). Although not explicitly referred to by participants during the study, the participants were aware of this ‘theory of action’ through their previous attendance at company run leadership development courses. During the initial stages of the project, the project sponsor had raised this theory in his discussions with the project team – seemingly to serve as a provocative learning action. One example comment (of many) which reflect such dialogue in one of the project team meetings involved, “When you went to leadership training… what defined a Model 1 and a Model II world… and what have you done to move toward a Model II world?”

As part of exploring their relationships during the study, Ken, Ted and Anton were asked to comment on the challenges they faced in changing their traditional relationships. Their responses were multifaceted. For example, Anton indicated that the traditional physical and socio-cultural demarcation between different plant operations presented a difficult relationship development challenge, but stated,

“How we have to change that barrier so that we start to work across the batteries and I think that’s what I’m trying to do with Ted … [...] … I suppose some of the conversations that we have together in the project team is pushing us down a few different tracks, that is making us rethink perhaps our beliefs as to what relationships are possible.”

Ken emphasised the ‘internal’ struggle he felt they all possessed about this relationship issue, by suggesting that,

“we are all struggling around what does this change really mean. We are all struggling to come up with non traditional, non hierarchical responses as to how we should work and learn together … our task is to make these things explicit and build our relationships and understand what the relationships need to be and to manage the egos around it.”
Ted articulated a list of issues, which he considered were restraining people from changing their ‘traditional’ relationships. These involved: the uncertainty present in the organisational, business and project environments resulting in people persisting with the ‘devil you know’ syndrome; a lack of courage and knowledge within the participants to pursue change of this nature; long serving employees on the project team [most having served more than 15 years in this one organisation] where their current relationships were forged by their past culture experiences, which were well known and understood, and; not clearly seeing ‘what’s in it for them’ through their participation in the change process and questioning whether their efforts would be valued. At that time, Ted subsequently concluded that changes to their relationships and to their collective learning activity were dependent upon the individuals being self-motivated and committed enough to drive it.

Also, at the start of this project some learning relationships were considered more relevant than others. For example, Ken commented that,

“Our learning relationship barriers involve hierarchy. The guy who sees a problem is still not prepared to share it upwards. We need to learn from the guys doing the jobs, be prepared to listen to the guys and to seek out and value the comments when we get them, even though it may not be immediately valuable [as Ken might perceive it].”

This comment reflected the intertwining of perceived authority with the learning relationships that these participants had with other people and implied that their authority (or at least perceptions of it) had flavoured peoples’ attitudes and approaches towards sharing information with them. Ted suggested that they (the project participants)

“… only value input from the right source. We need to seek out people throughout all the hierarchy, whether it comes from the right or wrong place. In our culture we look for the answers only in certain areas. Listening to all is the key to the [learning] system working.”

Ted’s comment indicated that some relationships were perceived by the project participants as more valuable for learning than others, and those ‘others’ seen as more obligatory – attracting less focus or just ignored. However, all these comments also reflect that these participants increasingly and genuinely acknowledged important socio-cultural influences on how they perceived and valued their relationships and that they considered there were positive learning outcomes to be realised through them proactively altering those existing relationships.

Immersed in this complex socio-cultural milieu, Ken (for example) actively sought to reduce what were current barriers to learning in his relationships with other people external to the project team and across the traditional work silos. This primarily involved him in informal activities consisting of conversations with people, seeking and offering advice and positing questions about operational and change process issues. Within that context, those actions effectively constituted new approaches to coaching and mentoring of section employees. Ken indicated that during those exchanges, he was trying to talk up the notion of the Cokemaking Leadership Team [the project team], since

“One of the characteristics about our traditional culture around here is a lack of trust and that extends very much to a lack of trust of what goes on behind closed doors or assumed closed doors.”
In this dialogue Ken was suggesting that he was conscious of influencing perceptions of the Cokemaking Leadership Team in the rest of the organisation, since he considered this cultural ‘lack of trust’ may have inhibited the development of the organisation and of the project team activities. In performing these actions, he repeatedly confronted and challenged a governing value of cultural mistrust between different groups in the organisation. Ken espoused his belief in trying to work together on the basis that if they shared relevant information and a common set of principles with a team then the team will come up with the right answers. As he indicated, “We don’t have to dictate the way that everything’s to work. It’s quite counter productive and maintains the old culture if we were to do that”. He suggested his own extensive informal efforts (and those of his colleagues) in reducing the relationship barriers were quite significant given the cultural history of the site. As well as helping to build relationships between people across the organisation, Ken’s interventions also helped to progressively ‘chip away’ at the cultural ‘authority’ issues for learning imposed by his own previous hierarchical position.

The following vignette provides an example of Ken, Ted and Anton’s informal efforts in coaching and mentoring each other. This appeared to be radically different to how they would have traditionally mentored each other prior to the project team forming, that is, it would not necessarily have happened! It also illustrates them expressly grappling with their own relationship issues and those they have with other employees external to the immediate project team, but involved in the broader change process. These actions incidentally, were in accordance with their stated project goals of redefining their relationships and practicing new leadership skills.

One morning at work, Anton sought Ken and Ted’s advice on an important operational and relationship problem he was having with a number of key employees in his area of responsibility (i.e. the numbers 4, 5 and 6 coke batteries). This problem involved the employees’ current work behaviours not being seen as aligning with the needs of the current or future operation, and Anton aggressively seeking to change those employees’ work behaviours. Anton, Ken, and Ted talked expansively through what exactly were the issues that Anton needed to address and how he might keep attacking the assumptions that sat behind the employees’ demonstrated behaviours. As a team, they appeared to both try to help solve the problem Anton presented, but also, to challenge and explore what were the critical underpinning aspects of Anton’s relational conflict with the employee group – thereby not simply focus on the exhibited behaviours of the employees and presenting problem. Notably too, their dialogue included much about Anton’s own behaviour with the group. After the event, Ted reflected positively on this mentoring episode, by stating,

“So that event was good as a joint learning experience … we actually sat down and said how do we actually break the psychological barrier exhibited in the issue and better understand how we reward people, and, we questioned how we get into peoples heads to better understand them. This activity was an attempt to draw upon our collective experiences and to learn from each other …. It was a comforting thing for Anton to try, and for us to be the sounding boards.”

While at the time of this one particular event it may not have been readily apparent to the participants, through their communal and critical reflection actions on that occasion, they were also helping to develop their abilities in ‘learning how to learn’. That is, their actions were helping develop their individual and team understanding of their own
A.J. Sense

approaches and biases to learning opportunities or problem situations. This increased awareness and understanding aided them in configuring their situations or actions to become more effective and more purposeful learners in later events or situations. Through helping to reduce their fear of sharing information and their concerns with each other and also exposing and sharing their tacit knowledge, these types of occasions provided further opportunities for the participants to jointly challenge, better understand and steadily build their own learning relationship frameworks. This example (amongst others) of project participants conducting an ‘operational-focused’ discussion first, which then led onto critical reflections about their learning behaviours, was a general circumstance shaped by a number of considerations pertaining to the situational context of the project case. The demonstrable activities pursued by this project team in attempting to build their relationships, suggested that they progressively came to view their relationship problems as major learning opportunities – rather than viewing them as problems to be quickly isolated and solved or bypassed and not discussed (Argyris, 1990, p.43).

As a brief example of treating a perceived relationship problem as a learning opportunity during the middle of this study, Ken reflected that,

“One of the things that can create learning barriers is where you get individuals not actively participating [in team meetings] ... Whether they are taking it in and reflecting internally or whether they are just switched off and thinking about something else ... The internalizing creates a barrier where the collective wisdom is not getting shared. Often guys who are sitting there internalizing have got a good point of view, a valid point of view [in his opinion], one that will carry a discussion somewhere else and to someplace valuable, and, they’re not sharing it and the group is being denied some wisdom.”

These comments may reflect a cognitive style issue, but also reflect that Ken perceived there were learning difficulties between project team participants, which may be rooted in their relationships. That being, people did not seem to freely and actively participate in the meeting sessions. When asked if he felt that situation was happening a lot in the team, he replied, “Oh yes. At any time we’ve probably got 50% active participation”. When challenged on what he does to change that situation, he responded by saying,

“I have no easy answer on that. I’m starting to challenge them more. If somebody is disengaged I’ll sometimes try a question that asks how they are feeling? Where they are up to? Or, whatever seems appropriate in the context. So I’m probably doing those more … doing them enough is another thing and if I’m going flat out [actively participating himself] then I’m not taking notice of that anyway.”

Rather than ignore or reject these ‘disengagement’ or ‘non-participation’ situations in the project study, Ken increasingly demonstrated his preparedness to challenge and change these situations by pursuing the other participants for their opinions and ideas. In doing so, across multiple project events, he undertook many actions that frequently energised participants to interact more and through their new interactions (both verbal and reflective in character) they learnt and better contributed to the situated learning activities of the team.

In sum, despite having been provided an opportunity to systematically improve their learning relationships and to learn, the participants in this case study project team demonstrated an initial regressive attitude toward public exposure and scrutiny of their personal concerns regarding project matters or on matters concerning their own project
performance. This was revealed in their deployment of defensive routines to avoid discussion of their difficult relationship and project issues. These defensive processes tended to restrict knowledge exchanges and situated learning activity between participants and it took many meeting sessions for participants to progressively and openly acknowledge their defensive actions and to re-direct their attention onto issues regarding building their own learning relationships. Over time however, since learning and building their relationships were established as core aspects of the project team activity and through their open and communal reflection on these issues, the participants were increasingly prepared to and did positively explore and implement alternative relationships. They came to view existing relationship issues as significant learning opportunities – a situation punctuated by a comment from Ken when he stated, “our task is to make these things explicit and build our relationships and to understand what our relationships need to be and to manage the egos around it”. Over the full project cycle, their communal learning actions in addressing this sociological element, reduced their defensive behaviours and altered their approaches to the mentoring and coaching of each other and people external to the immediate project team. Incidentally, these purposeful and systematic learning actions also progressively helped develop their abilities in ‘learning how to learn’.

5 Conclusion

This paper has presented an empirical insight into the social world of project management learning and an argument that within a project context, the ‘learning relationships’ between project team participants constitute a powerful sociological influence on situated learning activity – and therefore require deliberate managerial attention. From this case study, two empirically derived conditioners of participants’ ‘learning relationships’ were identified and elaborated upon. These involved, ‘attitudes to public exposure and public scrutiny of personal matters’ and ‘preparedness to explore one’s learning relationships with others outside of the existing relationship frameworks and viewing relationship problems as major learning opportunities’. As illustrated in the case study examined and as difficult as it may be for a practitioner audience to engage with at a personal or professional level while undertaking a project, this paper also argues that the public exposition and communal reflection on a project team’s ‘learning relationships’ (and the conditioners therein) is essential in aiding the development of strategies and actions to overcome relationship barriers and to promote situated learning in a project team. Taking such systematic learning actions offers a practical (albeit potentially difficult) avenue to ‘practice’ learning within a project while also incidentally aiding the development of project practitioners’ skills in ‘learning-how-to-learn’. These findings, relating to stimulating situated learning and learning relationship development as presented in this paper, may also serve as a starting point to focus project practitioners and researchers on the pragmatic and complex sociological issues involved in learning and knowledge management within a project setting. More generally, they may also stimulate debate about the importance of organisational change participants systematically exposing and communally attending to their ‘learning relationships’ issues so as to promote their learning and positively progress their change initiatives.
References


