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Author(s)	Hashiguchi, Michiyo
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A Case Study of a 'Learning Organisation' in the Voluntary Sector

Michiyo HASHIGUCHI*

Abstract

The purpose of the study was to evaluate the Swarthmore Education Centre in terms of its performance as a 'Learning Organisation', by drawing on the literature to create a model of a learning organisation, and comparing this model with the available data about the Centre. The model that was developed consisted of eleven elements. Case study methodology was used to collect data, and the data collection methods used included ethnography, a questionnaire survey, in-depth and semi-structured interviews, and the analysis of primary and secondary data. The findings are as follows. First, many issues about learning organisations that are discussed in the literature are not really relevant to a small organisation in the voluntary sector. Second, the concept of learning organisation has been applied more consistently in the private sector, where there has been a tendency to equate learning with training. Third, this research identified different approaches to learning organisations from sector to sector: the private and a part of the public sector uses a learning organisation framework which is 'top-down', but, like part of the public sector and much of the voluntary sector, the Centre is 'bottom-up' and has become a learning organisation without an Human Resourse Management (HRM) department.

* PhD candidate at the Osaka School of International Public Policy, Osaka University.

Introduction

This paper presents a case study of a voluntary sector organisation, the Swarthmore Education Centre. The purpose of the study was to evaluate the Centre in terms of its performance as a 'Learning Organisation', by drawing on the literature to create a model of a learning organisation, and comparing this model with the available data about the Centre. The model that was developed consisted of eleven elements. Case study methodology was used to collect data, and the data collection methods used included ethnography, a questionnaire survey, in-depth and semi-structured interviews, and the analysis of primary and secondary data.

Keep and Rainbird（2000）argue that the development of learning organisations is a necessary strategy for coping with the rapid changes that are occurring, and that learning can give an organisation a competitive advantage. They then go on to place the responsibility for developing a learning organisation, thereby making the concept into one which drives change from the top down. However, a study of the literature on learning organisations in the UK shows that this model is derived from a small number of successful learning organisations, mostly leading companies from the private sector, such as Rover Group, and the National Health Service, which is a very large organisation in the public sector, all of which possess sophisticated HR and training practices. The current debate about learning organisations and the related issues are, therefore, based on models drawn from a very limited range of organisations.

The background to the debate on learning organisations raises two very important questions: Are the current issues surrounding the application of the concept of a learning organisation likely to be the same in the voluntary sector? Can the concept of a learning organisation only be implemented in a large organisation with an HRM department? In order to answer these questions, the present study examines the concept of a learning organisation through a case in the voluntary sector.

In the first place a review of the literature was conducted, to develop a model of a learning organisation which would be appropriate to use as a standard of comparison for the voluntary sector. A model was developed and adapted, drawing upon the work of Marquardt and Reynolds（1994）. This model presents eleven elements which are seen as being essential facets of a learning organisation. This model was then used to construct a 'learning organisation strength chart' for the case study organisation. The prescriptions implied in the learning organisation strength chart could then be compared with the ethnographic data from the case study organisation in order to form a judgement as to whether the use of the concept of learning organisation produced valuable insights into the operation of the case study organisation. This process then makes it possible to come to tentative conclusions in relation to the research questions: Can the concept of learning organisation be usefully employed in developing insights into the operation of a small organisation in the voluntary sector? The final section of the paper summarises the main points of this research.

The Case Study Organisation

The present study focuses on the operation of Swarthmore Education Centre. Swarthmore Education Centre is an independent, not-for-profit organisation, committed to the development of educational programmes that promote lifelong education. It therefore seems a likely candidate to be a learning organisation. In addition, it is representative of the voluntary sector in Leeds, a large industrial city in the north of England where it is located. Moreover, and most importantly, the centre has not changed its vision since 1909.

Since the purpose of the Centre's business is to meet community education needs as a lifelong learning centre rather than making a profit, the Centre has two main funders: Leeds City Council (LCC) and the Learning Skills Council (LSC). Traditionally, the Centre runs its own courses for leisure purposes, while its main funders tend to support vocational programmes that focus on the learning of basic skills. Some idea of the activities of the Centre can be gained from the fact that, in the academic year 2003/4, 2,856 people enrolled for courses, of whom 1,143 (40%) enrolled on courses supported by the Centre itself, 1,019 (36%) enrolled on courses supported by the LSC and 694 (24%) on courses supported by the LCC.

These figures make it clear that the Centre has strong links with local government (LCC being the local government for Leeds), but it also has a network with umbrella agencies which support voluntary organisations in Leeds. The Director of Swarthmore Education Centre is the chair of the Learning Forum, as well as a member of the Leeds Learning Partnership Board. Active participation in these groups shows that the Centre is seen as one of the leaders of the Leeds voluntary sector.

The Centre has been open to learners since it was founded by the Society of Friends in 1909, and succeeding generations of learners have benefited from its programmes. But a learning organisation is not only defined in terms of its external relationships; it also has certain internal features as a workplace. In order to investigate and analyse the extent to which Swarthmore Education Centre has become a learning organisation, the concept of a learning organisation and the voluntary sector are examined to clarify the terms used in this research.

Literature Review

In the first place, the literature survey focused on the concept of a 'learning organisation'. The related issues will be identified from studies that have been conducted. Numerous attempts have been made by scholars to describe a learning organisation, especially during the 1990s. The foundations of learning organisations have been introduced in several ways, but the most widely used definition of a learning organisation is Senge's (1990: 3) description: 'Organisations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of

thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together'. Many scholars have used this definition as a basis for their study, and for this reason Senge's definition is adopted for the present study.

While Senge's definition is a useful starting point for conceptual analysis, it is not very specific. For this reason, a number of scholars have developed frameworks that identify specific features of learning organisations that are more useful for practical implementation or evaluation studies.

Keep and Rainbird (2000) emphasised three difficulties in studying learning organisations in practice. The first difficulty is that the idea of a learning organisation emphasises the importance of learning at an individual and societal level at the same time (Ashton and Felstead, 2001). In fact, as Cully *et al.* (1999) have shown, inequality in training opportunities mean that those who are in managerial positions, men, young people and full-time workers have more opportunities than those in non-managerial positions, women, older workers and part-time workers. So evaluating a learning organisation in terms of who learns what is very difficult. The second difficulty is that, because learning organisations have mainly been studied in the private sector, the concept is often related to the product market in terms of power relations in the workplace (Ashton and Felstead, 2001).

Figure 1: The Complete Learning Organisation

Model—The Compleat Learning Organization
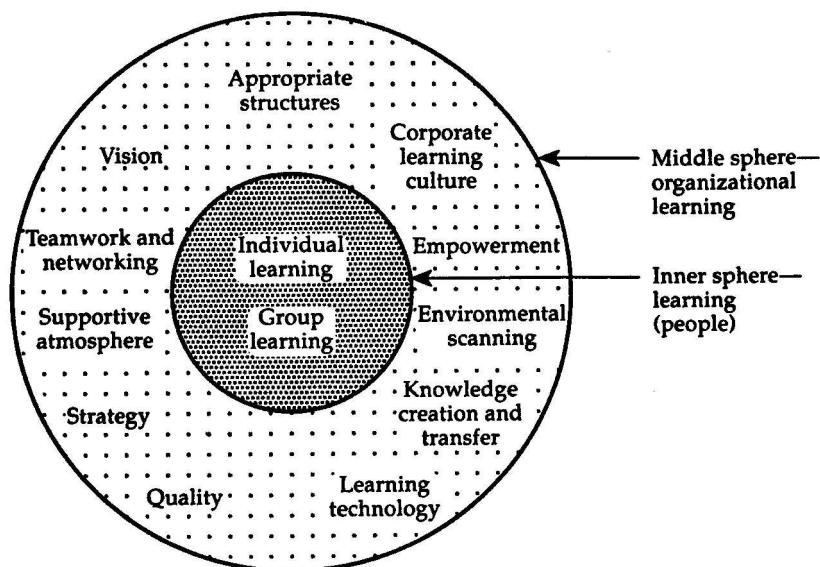
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Source: Adapted from Marquardt and Reynolds (1994)

For example, management in the UK is traditionally top down, and management, therefore, see employees, and employee development, as a cost. As a result, they pay little regard to the learning organisation's 'communitarian vision'. Lastly, the infrastructure to promote training and development in the UK is weak（Ashton and Felstead, 2001）.

To overcome these difficulties, I adopted a framework developed by Marquardt and Reynolds （1994）. The learning organisation's features, as described by Marquardt and Reynolds （1994）, consisted of 26 items. However, this was too complicated, and it appeared that some of the elements were unnecessary. I therefore adopted a simplified framework with 11 elements. The adapted model of Marquardt and Reynolds is illustrated in Figure 1.

Using the 11 elements, as illustrated in the figure, a 'learning organisation strength chart' can be drawn up, in which the performance of the organisation under review is evaluated on each of the 11 items.

Method

Investigating the strengths of a learning organisation requires qualitative research. Although a case study has weaknesses in relation to transparency and generalisation, it can answers 'why' and 'how' questions which address details of the learning organisation's characteristics. Risk of bias can, to some extent, be overcome by collecting evidence from a variety of sources and cross referencing observations. Sources of data can include participant testimony gathered through questionnaires or interview, together with ethnographic observation. Ethnography involves direct observation of respondents in context, and it enables the researcher to interact with both respondents and the setting – to link values and behaviour in their natural settings（Strauss and Whitfield, 1998）.

In order to conduct this case study, I joined the Swarthmore Education Centre as a volunteer from September 2003 to July 2004 to support disabled and elderly learners. Also, I became one of the Council members from March 2004 to December 2005. By developing appropriate relationships with people in the Centre, the trustees and the Director gave permission for me to conduct a formal case study.

As a preliminary to conducting interviews, a questionnaire survey was conducted. The 30 respondents were selected randomly on a first-come-first-served basis（100% response rate）. The following in-depth and semi-structured interviews included 5 managerial staff members, 3 non-managerial staff members, the chair of the Council, and the Director. The average time for each interview was 19 minutes per person, and all interviews were tape recorded and transcribed for analysis. Also, ethnographic data was collected by taking both a covert and an overt role during the main meetings. The 11 learning organisation elements were examined using the above research methods, to see how the Centre actually works.

Findings

In the following sections, each of the 11 elements is considered in turn. Data was gathered from the questionnaire survey, the interviews, the ethnographic observations and from documentation in the Centre including self-reports, policies and strategies that relate to the 11 elements. Swarthmore Education Centre is evaluated according to its performance on each of the 11 elements.

1. Appropriate Structures

Marquardt and Reynolds (1994:31) state that appropriate structures 'include a flat, streamlined, holistic structure'. People who work in Swarthmore Education Centre total 95 full-time and part-time paid staff, together with 50 non-paid staff. All the staff belong to departmental teams. Apart from the teams, there are cross-sectional working groups with three layers of business administration in a hierarchical structure. The upper layer consists of 15 trustees, including two representatives from the Society of Friends. The middle layer, called the management team, consists of the Director and the six line managers. The Director is trying to empower the line managers by incorporating them into the management team, which helps to shorten the time for decision making. The lower layer includes supervisors, core staff, tutors, and volunteers.

The basic role of the upper layer is to discuss and approve business agendas for the Centre, including finance and policies. These are discussed and approved at the Council meeting which is held once in a month. Meanwhile, the middle layer is in charge of the operational level of work, including decision making. The lower layer works towards the goals of the different teams under the supervision of the line managers. It is not written down, but the trustees (upper layer) and the management team (middle layer) have built an equal partnership to maximise the business output. For these reasons, Swarthmore Education Centre can claim to have a structure which is fit for local business conditions.

2. Quality

Marquardt and Reynolds (1994:32) explain that, 'Quality is the commitment to continuous improvement'. First, Swarthmore Education Centre has a three year strategic plan, which states that the Centre encourages staff to participate in training. For example, they plan to require new tutors to have National Vocational Qualifications (NVQ) Level 2 or equivalent qualifications, as well as encouraging existing tutors who do not have the qualification to get it. Second, the Centre conducted a customer satisfaction survey in the spring of 2005 for the purpose of quality assurance. The questions were focused on user satisfaction in relation to the reception area, coffee bar, and facilities. The Centre ensures the results are fed back to workers so that they can provide better services. Third, the Centre accepts inspections from local government and external organisations, as well as receiving a number of consultants. These measures are designed to ensure that the business runs appropriately. Fourth, the Centre was nominated for IiP (Investors in People). From these reasons, the Centre can be seen to have appropriate quality with proof of national standards.

3. Environmental Scanning

Marquardt and Reynolds (1994:31) indicate that environmental scanning 'is a description of comprehensive and considered scanning of the environment...economic, political, social data that will benefit the organisation are the product of this effort'. First, Swarthmore Education Centre is located in an area which is among the ten per cent most deprived regions in the country. The Centre regularly gathers statistical data about its area from external institutions, and uses this to inform strategy in order to find potential learning groups. An example of this is a project to engage with Asian groups to encourage using IT. The target learners were those who had either never been in a learning environment or had been out of learning for a long period of time in the local Asian community. The purpose of this project was not only empowerment of a beneficiary group, but also motivating the project workers who belong to the community through the project.

Another example was a situation where a community group was looking for a space for community gatherings. The chair of Council asked the Director for any possibilities, and it was decided that one of the rooms in the Centre should be refurbished for use as a multi-purpose community room, using financial support from LCC. The Centre benefited from the refurbished 'Elain Heaton Room' by taking community needs seriously.

The above examples illustrate the way in which the Centre has gained strength from a process of environmental scanning.

4. Strategy

Marquardt and Reynolds (1994:32) state that 'this element comprises conscious and deliberate planning from leadership and key structures within the organisation to make learning, in its broadest sense, a 'prime business' of the organisation in which learning is seen as a principal driver'. The relationships between Swarthmore Education Centre and its main funders, the LCC and LSC, influence staff training and development. The Centre has traditionally focused on promoting learning for people in the community. However, the government began to prioritise workforce development together with the areas of community education that had been the focus of the Centre's work. The Centre then took a strategic decision to invest in staff training and development, to adopt a staff development policy and to seek IiP recognition, so that it could take advantage of this new strategic direction, and the related funding. One of the line managers observed in the interview that, 'The government priorities are really getting people involved in work... the Centre aims to inspire learning, so we have to fit in some of what the government want us to do... we have to make sure that we can maximise the funding'.

Each year the Centre holds three year strategic planning meetings, or 'Away Days', to discuss planning, including funding matters. The participants are the 11 trustees, 5 line managers, 1 supervisor, the Director, and the chair of Council. I observed one meeting with an external facilitator. The meeting was concluded with an agreement that included a number of points, specifically to im-

prove transparency over finance and income, and to seek a management report on the needs for Council and staff joint cooperation. Immediately after the meeting, the Director started to issue a monthly newsletter to disseminate the Council management report to staff. From the arrangement of the 'Away Day' meetings and the response of issuing the newsletter, the leadership of the Centre can be seen to be responding in a strategic way. The Centre is highly reliable, meeting the definition of this element of strategy.

5. Vision

Marquardt and Reynolds (1994:32) state that vision 'includes the mission, values, and beliefs of the organisation'. First, the ethos of the organisation, as reflected in the mission statement, has not changed since Swarthmore Education Centre was established. Also, the Centre retains two members of Council from the Society of Friends, who were the founders of Swarthmore. Second, Swarthmore Education Centre is a formally registered charity, and consequently accorded protection from taxation by the UK Charity Commission. While charities need to fulfil a common set of purposes such as 'benefit to the community', they can choose from a number of legal forms (Anheier and Salamon, 1994). Swarthmore Education Centre is a company limited by guarantee; its membership, general meetings, voting, and management committee are in conformity with the required regulations. The vision of the Centre is, therefore, supported by regulation. Third, in the interviews, the chair of Council made the point that the Centre has not changed fundamentally, although it has obviously made adjustments to changes that have taken place over time. She has known the Centre for forty-years as a resident, a learner, and as the chair of Council. The Centre has maintained the same vision for about a century by sharing it, not only with staff in the organisation, but also with people in the community.

6. Corporate Learning Culture

Marquardt and Reynolds (1994:31) state that 'Corporate Learning Culture' is 'where learning is highly valued, where risks are encouraged and rewarded, and all have responsibility for their own learning and the learning of others'. Swarthmore Education Centre makes a commitment to allow all staff to develop skills, improve performance, and reach their potential in its 'Staff Training and Development Policy'. The policy includes details of the line managers' responsibilities for supporting their own staff, and all staff will have equal access to training. However, the results of the questionnaire survey showed that fourteen respondents disagreed to the view that, 'I need paid training in addition to health and safety training'. From the interviews, it could be concluded that almost all the managerial and non-managerial staff had already joined the on-site training which the Centre provides. One of the staff mentioned that when his line manager informed him about the availability of training opportunities, he declined the offer. He explained that having the chance to attend a class on stained glass, which was not offered by the Centre, helped him more in learning about techniques involved in his job. Since the new challenge has just started, the Director noted that Centre is endeavouring to change the culture so that people see training as important and crucial because, 'There is so much change going on in the world, and it is going on by learning and teach-

ing'. For this reason the Centre is actively offering training opportunities to all staff, particularly since it has achieved IiP. However, there may not be a great need for training in the Centre, judging from the responses to the questionnaire survey and the interviews. Therefore, the situation includes negative indications, in spite of the fact that the Director is positive about changing the culture so that people see training as important.

7. Supportive Atmosphere

Marquardt and Reynolds (1994:67) mention that 'learning organisation concerns not only organisational productivity and profits but also the quality of the employees' working lives'. First, all activities at Swarthmore Education Centre are ruled by the Equal Opportunities Policy, including the service provision, employment practices, executive council structure, membership and meetings, volunteer recruitment and selection, and partnership working. Indeed, I represented an ethnic minority, but received free training opportunities in the 'Introduction to Volunteering Course' and 'Emergency Aid at Work'. This can be counted as evidence that the Centre supports development of the full range of human potential towards the staff, whether paid or unpaid, within the remit of the Equal Opportunities Policy. Second, the Centre provides services to the learners, including a free, confidential counselling service, on-site childcare and learning support. These seem to influence the workplace. In the interviews, one of the managerial staff commented that the Grade II listed building which houses the Centre enhances the supportive atmosphere and 'it feels just like home'. Third, their working style is democratic, because the staff are able to have two different jobs if they want. For example, while some tutors teach two or three different courses, the majority of other tutors are teaching one course. Whereas one part-time core staff member works as an administrative assistant and tutor, one full-time core staff member works as a line manager and a tutor. The Centre does not force them to do this; the working patterns arise naturally from the pattern of their working lives. For these reasons, the Centre is concerned not only with the outcome of organisational performance, but also with the quality of its employees' working lives.

8. Teamwork and Networking

Marquardt and Reynolds (1994:68) explain that 'effective learning organisations know the importance of working in teams to maximize knowledge and resources'. Swarthmore Education Centre is committed to teamwork. The Centre is organised in 8 departmental teams: Finance and Services, Art, Counselling and Personnel Development, Information and Communication Technology (ICT), Skills for Life, Management Information Systems, Centre Administration and Advice and Guidance. There are also three cross-sectional working groups. One of the working groups is called the management team and consists of six line managers and the Director, who look after all business matters including personnel at the workplace level. They hold weekly meetings to discuss workplace-related matters. Meanwhile, the Health and Safety Committee consists of a few members of the Council, the Director, the senior caretakers, assistant caretakers, and art technicians. They meet once a month to ensure the staff, management, building, and facilities are properly working in accordance with the Health and Safety policy.

The Centre has strong connections with external bodies, including those with other voluntary organisations, community groups, and local government. They hold regular meetings with community education staff from the main colleges and universities in Leeds to ensure a collaborative and strategic approach to local provision, as well as meetings sponsored by the local inter-agency network. For these reasons, team work and networking at the Centre has a substance that maximizes knowledge and resources.

9. Empowerment

Marquardt and Reynolds（1994:31）state that the element of empowerment includes both capacity and power. 'Empowerment is given as close as possible to the point of interaction with the customer or client. Empowerment permits learning to happen through responsibility'. In the interviews, one of the tutors stated that Swarthmore Education Centre provides opportunities for staff to learn by themselves. According to the tutor's explanation, the whole area of young adult education, including engaging young people with issues, is challenging. The Centre's community project targets young adults aged fourteen to sixteen who have been excluded from school. In order to deal with these young adults effectively, the tutor, along with her colleagues and line manager, are taking offsite training. The tutor described that training as very useful for predicting reactions. However, because the training focused mainly on certain school situations, they had to figure out day-to-day solutions in a completely different environment: 'Everybody realised how challenging it is, including the line managers'.

On the other hand, one of the core members of staff, who interacts often with the learners says that she feels empowered by the line manager because she, 'Quite often lets me decide what to do all the time – in that respect, it is quite good.'

In addition, the Director stressed the positive view of empowerment in the Centre, stating that, 'If staff are empowered, they are more prone to be supportive and active within the organisation'. From the above examples of existence of empowered staff, and the Director's positive view, the Centre certainly seems to have a focus on empowering staff.

10. Knowledge Creation and Transfer

Marquardt and Reynolds（1994:32）indicate that 'in organisations that transfer information best, knowledge is gathered, coded, stored, and disseminated quickly and seamlessly across functions, levels, borders, and cultures.' A formal method of the knowledge creation and transfer can be seen from the processes set out in the 'Employee Handbook' and the 'Centre Handbook'. The drafts of these documents were prepared and discussed by the management team, and each policy was approved at the Council meeting.

In the interviews, the Director commented that, 'All suggestions came from staff and then went to the Swarthmore Council'. In addition, the Centre plans to reinforce knowledge creation and infor-

mation through the Management Information Systems (MIS) in the strategic plan.

One of the line managers noted that she motivates staff by circulating as much information as possible, and by setting informal meetings to complement formal meetings. Indeed, all staff who were interviewed admitted that, whenever they have a question they go and see their line manager informally. However, it seems that in some cases, the informal structures are not working effectively. For instance, two staff mentioned that the transfer of information should be done in a more formal manner when the information is important, because an informal transfer often confuses them. At the same time, one of the managerial staff indicated that because the line managers are extremely busy, feedback is often not forthcoming and even the annual job review had not been performed at the time of interview. On the other hand, one of the members of staff remarked that, while discussing increasing communication with the line manager was good, things have not changed.

From the above evidence, although it depends on the line managers to some extent, there seems to be a lack of feedback, information circulation and intra-sectional collaboration at the Centre.

11. Learning Technology

Marquardt and Reynolds (1994:32) state that, 'Learning technology specifically includes information technology, which increases information collection, analysis and distribution, and knowledge and skill development'. Swarthmore Education Centre provides computers to staff for data collection, analysis, and distribution. Also, staff can use IT equipment such as laptop computers, digital cameras, digital video cameras, printers, scanners, and digital projectors as well as the self-help learning materials, provided on a small selection of CD-ROMs. The Centre places an emphasis on staff training, particularly in Health and Safety, and made a special effort in Internet training in 2005. The newsletter shows a few photos of members of the Health and Safety Committee participating in the training.

At the same time, the newsletter also carried information about the Centre adopting a new project using IT Skill called E-Skill passport and ITQ, which is offered by the National Institute for Adult and Continuing Education in England and Wales (NIACE) . This is a new IT qualification and is a form of NVQ training. 12 Centre staff had taken the E-Skill passport, which is an online tool to self-assess individual current IT levels across a range of topics. In addition, the newsletter mentioned that the Director and one of the line managers planned to join an IT training programme offered by NIACE.

For these reasons, the Centre can be seen to have learning technology including computers and self-learning materials, which the staff can easily access. Also, not only the 12 staff, but also the senior management, plans to participate in IT-related training. Therefore, the Centre has strengths in learning technology.

Summary of the Results

Having reviewed the eleven elements separately, we can now summarise them, as shown in Table 1. The ticked boxes indicate unambiguous strengths; if there was any suggestion of a negative response, that aspect cannot be seen fully as a strength. As a result, there are 9 strengths and 2 areas where there was some indication of negativity.

Table 1: Learning Organisation Strength Chart（☑）for Swarthmore Education Centre

Appropriate Structures	☑	Supportive Atmosphere	☑
Quality	☑	Teamwork and Networking	☑
Environmental Scanning	☑	Empowerment	☑
Strategy	☑	Knowledge Creation and Transfer	☐
Vision	☑	Learning Technology	☑
Corporate Learning Culture	☐		

Source: Adopted from Marquardt and Reynolds（1994）

The two weaknesses should, perhaps, have some explanation. Firstly, one of the core staff members mentioned at the interview that he had not taken an offered training opportunity, but had instead taken the opportunity to join a stained glass class, and had learned a useful skill, and applied it to his jobs. This is reasonable to some extent, because the skill was used in a real job situation which arose in the workplace. How should we judge this situation? Senker（2000）indicates that it is impossible to quantify work-related learning realistically and it would appear that this conclusion is inescapable. Using the case of an engineer's off-the-job training, learning from training is generally minor in relation to learning from work experience and from making mistakes, and through communication between colleagues.

Swarthmore Education Centre has traditionally focused on inspiring people in the community to learn. However, the government began to prioritise workforce development alongside the areas where the Centre had previously concentrated its effort. Thus, the Centre had moved away from its original focus and adopted a staff training and development approach, as well as IiP, to secure funding. Senker argues that success or failure in meeting the British Government's objective of investing in human capital cannot be measured in this way, as the evaluation and assessment incorporated in government programmes only assess a relatively small proportion of the employees' learning. From this point of view, training is not equal to learning. The fact that staff generally did not think that there were high levels of need for training cannot be taken as an indication that there was not a learning culture. However, overall, and when learning and training are taken together, the element of the corporate learning culture at the Centre cannot be seen as a strength.

The second area that showed some weakness was Knowledge Creation and Transfer, and those questions were raised in the results of the questionnaire survey. The aspects of sectional collaboration, feedback, information circulation and meetings were confirmed to be important issues for staff in the Centre in the interviews. For example, while most of the staff have informal meeting opportunities to meet with their line managers when necessary, a few staff commented that it is confusing when important information is transferred informally. One of the staff noted that everybody is too busy to be able to transfer information formally. Hay *et al.* (2001) argue that informal, verbal communication is typical in the voluntary sector. On the other hand, they also argue that a formal communication strategy has a positive impact on the business administration process, both internally and externally. This reasoning suggests that, at the very least, Knowledge Creation and Transfer is an area where some improvement could be achieved, and it can therefore reasonably be judged to be a weakness.

Discussion

In order to answer the research questions, the discussion focuses on three points. Firstly, HRM functions in Swarthmore Education Centre are examined. Secondly, current issues relating to learning organisations are discussed, to see whether the points raised in the literature also apply to the organisation in the case study. Thirdly, and lastly, the characteristics of the voluntary sector are discussed, to show how they relate to the Centre.

In relation to HRM issues, Cunningham (1999) points out that the voluntary sector tends to learn management 'know how' from the private sector in order to increase the service quality, and the appropriateness of adopting such HRM strategies needs to be considered. In case of Swarthmore Education Centre, there is no HRM department. The Director remarked that a separate department runs the risk of becoming isolated from the management, in addition to considerations of the possible labour costs in a small organisation. However, as has been noted above, the Centre meets the criteria suggested in the learning organisation framework. Moreover, some HRM functions are embedded in the Centre's policies and strategy. For example, the staff training and development policy is supported by the Equal Opportunities Policy. In this policy, the Centre commits to supporting individual development, takes on the staff responsibility for training needs, and clearly mentions the line manager as being in charge of training requests and feedback. Meeting the training opportunities of part-time staff is included in the three-year strategic plan. Although the Centre does not possess an HRM department, it can be seen that the functions are in place to maximise performance. Therefore, in spite of tight resources, people management in the Centre would appear to be ideal.

Moving on to the issues related to discussions about learning organisations, one of those issues is that learning organisations emphasise both individual and societal learning, and that this can produce some difficulties in setting priorities. It has also been suggested that the reality in the UK is different from the ideal, and that individual learning is given a poor second place. In Swarthmore

Education Centre there is no inequality among staff, no matter whether the member of staff concerned is managerial or non-managerial, female or male, old or young, part-time or full-time, in terms of the certain training opportunities such as health and safety at individual and societal levels. The second issue is that learning organisations do not have influence over the power relationships in the workplace. The result is that training and learning tend to reinforce and reproduce inequalities in workplace power. In the Centre there is empowerment and teamwork, and there is senior management involvement in a relatively flat management structure. The third issue is the weakness of the social infrastructure in terms of training and development. The Centre supports the priorities of the government towards staff development in the voluntary sector and maintains a good relationship with local government. The Director commented in the interview that the Centre has a training contract with LCC, and the main funding body is willing to train Centre staff on training courses. The last issue from voluntary sector is that organisations tend to be learning organisation only at the initial stages. As has been seen already, the Centre is currently a learning organisation. The Centre has not changed its vision since 1909, and adjusts itself by reviewing its strategy in order to meet the needs set by the funders. For these reasons, the current learning organisation-related issues do not seem to be directly relevant to the Centre.

Many learning organisations uses Senge's（1990:3）view that learning organisations are 'organisations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together'. Many scholars in the UK have discussed the concept of learning organisation on this basis. Keep and Rainbird agued that the basic concept provides 'training and HRM specialists with an approach for selling their wares to their senior management'（2000:175）. In contrast with this, Ashton *et al.*（1997）suggest that the concept of learning organisation is more of an obstacle for the contemporary notion of training. Moreover, Storey and Sisson（1993）argue that a learning organisation is not nearly enough, in terms of appraisal and reward systems. These criticisms of the concept of learning organisation are reasonable to some extent, although the concept guarantees neither the outcome of training nor appraisal and reward. In the case of Swarthmore Education Centre, its annual job review is not intended to make assessments for appraisal or for performance-based pay, but is solely a performance review. This fits very comfortably with the concept of a learning organisation, as it has been broadly interpreted by many scholars. However, both the learning organisation concept and the Centre's annual job review are ambiguous about learning. For example, Senge's concept does not clarify the relationship between learning and training（Jones and Hendry, 1994）; consequently, scholars have often used the concept of skill formation. The concept of a learning organisation has been examined to determine whether it could be a tool for providing lifelong learning in UK organisations or not, but the purpose of the learning organisation concept has not explored（Keep, 2000）. Gerber（1998）mentions that lifelong learning is connected with employees inside and outside their workplaces, and that the workplace should be seen as only one of the places in which people learn in their lives. Therefore, managers need to understand various types of learning of their employees. From this

point of view, managers being considerate towards their employees' leaning could be an advantage. Put another way, where there is a large distance from manager to the employees (top-down), it is not possible for managers to understand fully the employees' potential abilities which come from their various types of learning. Certainly, the concept of a learning organisation presented by Senge does not deny diversity of learning (Örtenblad, 2007).

Finally, turning to the characteristics of the UK voluntary sector (Almond and Kendall, 2000), Swarthmore Education Centre is typical of the sector in that it has a high rate of part-time, temporary workers, volunteers and the ratio of female staff is also high. In addition, the Centre is small, and its staff have a high level of general education, although it is larger than the typical voluntary sector organisation which has fewer than ten staff. Therefore, the Centre shares many characteristics with other organisations in the voluntary sector. However, this does not mean that the sector is likely to be full of learning organisations. There are two reasons for this. First and foremost, Swarthmore Education Centre is a lifelong learning centre. As Keep and Rainbird (2000) mention, the concept of a learning organisation is appropriate for an organisation that follows 'lifelong learning', and the Centre possesses this advantage of being an organisation that engages with education and training at many different levels. Secondly, there are limitations to the research methodology employed and one case cannot be generalised to cover all possible cases.

From the above discussion, four main points can be drawn together as follows. Firstly, Swarthmore Education Centre has ideal HRM functions even though it is without a specific HRM department. Secondly, after due consideration, current issues relating to learning organisations are not entirely relevant to the Centre. Thirdly, in order to explain the reasons behind the second point, the concept of a learning organisation was revisited, and it was suggested that, since the concept is ambiguous in explaining the various types of learning, it has often led to a broad interpretation of learning as equal to training. Lastly, although Swarthmore Education Centre shares some of the characteristics of organisations in the voluntary sector, the result cannot be generalised.

Conclusion

In this research, the focus was on current learning organisation-related issues for two reasons. First, these issues are based on the private sector and part of the public sector, and there has been very much less study of the voluntary sector. This made it necessary to look very closely at the issues in relation to the voluntary sector. Second, the successful learning organisation models are likely to include HRM departments, but, in order to examine whether this is a sound assumption, we need to examine whether implementing the concept of a learning organisation requires a HRM department. Based on the results of testing the hypothesis, the following points were discovered: (i) Swarthmore Education Centre HRM functions revealed that, since it integrates HRM functions into its policies and business strategies, it already has an ideal arrangement for HRM, (ii) the current issues relating to learning organisations are not relevant to Swarthmore Education Centre, and this

answers one of the research questions, （iii）it was concluded that the concept of a learning organisation is useful, but it is also ambiguous in explaining various methods of learning, including training, and （iv）by comparing the characteristics of organisations in the voluntary sector and those of Swarthmore Education Centre it was shown that there were some similarities. However, they are not enough to say that there are necessarily many more learning organisations in the sector for two reasons, namely the Centre may have the advantage of being an learning organisation by virtue of its being a lifelong learning centre, and the limitations of the research methodology mean that the results cannot be generalised.

In conducting this research, the need for a different approach from sector to sector was identified. For example, the private sector and large organisations in the public sector are 'top-down' organisations, and this has an impact on how they operationalise a learning organisation framework. But Swarthmore Education Centre is already a 'bottom-up' organisation, even before it knew what a learning organisation was.

Swarthmore Education Centre has shown itself to be a good learning organisation model. Profit-making is not the Centre's first priority, but the Centre has existed for about a century. There is no sense in which the organisation has abandoned its original ideals in order to pursue profit. The concept of learning organisation could be a framework to examine the extent to which the bottom-up nature of organisations in different sectors contributes to their performance as learning organisations.

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