

Trans-organisational learning across healthcare organisations

(Sub-theme 68)

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Background

It has been exactly 25 years since the publication of the first major scholarly article on Communities of Practice (CoPs). In a widely cited paper, Brown and Duguid (1991) introduced a new perspective on organizational learning where CoPs play a central role in developing an organization's ability to work, learn, and innovate. CoPs were understood as groups of people who learn together and from each other regularly because they genuinely care about the same real-life problems (Wenger, 1998). Since the original formation of CoPs (Lave & Wenger, 1991), this concept has sparked a new field of study where learning is portrayed as happening in practice and essentially involving an investment of identity in the social context (Currie & White, 2012; Gherardi, Nicolini, & Odella, 1998; Nicolini & Meznar, 1995; Pyrko, Dörfler, & Eden, 2016; Swan, Scarbrough, & Robertson, 2002).

Drawing on the existing literature, the objective of this paper is to clarify both the role and the nature of CoP in developing organizational learning across formal organizational boundaries in the healthcare setting. Our main argument is to demonstrate, with respect to theory and practice, that it is insufficient to claim, in line with the existing literature, that CoPs *may* cross organizational boundaries. Instead, we argue that members of productive CoPs *have to* work on opening up paths for participation for practitioners from other organizations in order to maintain a lively practice and an energetic community. In other words, members of CoPs necessarily strive to look beyond the scope of their regular communities to enrich their everyday learning with new perspectives and advance their knowledge.

However, whilst learning across organizations can benefit individuals and local communities, it can also impose a dilemma for managers who may feel that as practice-based knowledge leaks beyond traditional boundaries, managers may not be able to control what, when, and how is shared. As a result, this dilemma touches upon the natural elements of organizational life such as professional jealousies, competitiveness, legitimacy, and the desire to control beneficial knowledge. In our discussion we address this dilemma arguing that managers need to let go of control in order to enable the benefits of CoPs.

The departure point of our discussion is the idea of *landscape of practices* (Wenger-Trayner, Fenton-O'Creevy, Hutchison, Kubiak, & Wenger-Trayner, 2014; Wenger, 1998, 2009) which describes CoP membership not only as a way of developing competence within the context of an idiosyncratic community. The idea of a landscape of practices implies an

accountability to a broader landscape to draw on meaningfully in order to perform well as a practitioner, and this landscape most likely spans across teams and departments belonging to different organizations. As a result, the idea of landscape of practices calls for a view of organizational learning which takes place across multiple organizations rather than only within a single organization.

Whilst *inter-organizational* learning tends to have a fairly broad focus, it typically refers to learning incentivized by official collaborations and alliances between firms (Davis, 2016; Hamel, 1991; Holmqvist, 2003; Inkpen & Crossan, 1995; Jones & Macpherson, 2006; Larsson, Bengtsson, Henriksson, & Sparks, 1998). This literature importantly reinforces the view on contemporary strategy making as ‘... a joint process, to be developed with partners’ (Mintzberg, Ahlstrand, & Lampel, 1998, p. 267). On this basis we view the concept of inter-organizational learning, as too restrictive for consideration of CoPs which often emerge spontaneously, even if such informal learning partnerships may be enabled, indirectly, by the official inter-organizational initiatives.

In order to address the need to differentiate between the designed and emergent learning interactions between firms, we introduce the concept of *trans-organizational learning* to account for informal learning partnerships happening across landscapes of practice. It is not our intention to add ‘another branch’ to the organizational learning field which is already richly populated with concepts and labels (Crossan, Maurer, & White, 2011), but we rather aim to help strengthen the ‘trunk’ of the field. The conceptualization of trans-organizational learning highlights a difficult managerial dilemma of retaining control versus allowing employees the ‘discretionary space’ to regularly learn from and with practitioners from other firms, possibly including direct competitors. So, even if productive CoPs are necessarily trans-organizational, managers may want to try to keep knowledge in-house in order to retain competitive advantage. Alternatively, managers may foster CoPs in order to achieve the benefits to organizational learning. We argue that, with respect to the idea of landscapes of practices, that the latter approach is likely to be more promising for the long-term prosperity of an organization.

Research Context and Method

The empirical study which substantiates our discussion was conducted over a period of two years across different parts of the National Health Service (NHS) in Scotland. Notably, the NHS Scotland is not a single organization but rather a multi-organization health

system consisting of 14 regional health boards which all exercise a fair level of autonomy. The study comprised 29 one-hour long semi-structured interviews and loose conversations supplemented by observations and a review of relevant documents and websites. Participants were healthcare professional in the medical areas of sepsis and dementia who had interest in CoPs and improving patient care through peer learning. In addition, interviews were conducted with coordinators of formal 'learning networks' which, among others, included practitioners from these two medical areas. For organizing the interviews a combination of purposive and snowball sampling was used (Biernacki & Waldorf, 1981; Teddlie & Yu, 2007). The interviews included topics about learning in CoPs, organizational learning culture, and possible ways of developing CoPs in the workplace.

The interviews were coded and analyzed using a qualitative causal mapping method. The reason for adopting this method was that it is well suited for working with rich, idiographic qualitative empirical material. Causal mapping is a formal method following which an interviewee's way of thinking about a problem in question is represented in the form of directed graphs. The produced graphs are causal maps consisting of short statements (interview quotes) which are connected by unidirectional arrows signifying 'may lead to' relationship (Eden, 1992; Eden, Ackermann, & Cropper, 1992). This causal mapping approach is governed by specified rules which allow the maps to be analyzed in a structured manner – and this means that causal maps are not merely 'word-and-arrow' diagrams (Ackermann, Eden, & Pyrko, 2016).

In this research, causal maps were constructed in the causal mapping software (*Decision Explorer*)¹. The captured statements from the recorded interviews were mostly action-oriented where interviewees were implying that something needed to be done to change the CoP, (Bryson, Ackermann, & Eden, 2014) illustrating the dynamic 'worlds' of CoP members and their interpretations of their idiosyncratic worlds. The final map, including the merged material from all interviews, comprised 1869 interconnected statements. The analytical features of software allowed to search for interesting patterns in the empirical material, including self-reinforcing (positive) feedback loops and 'busy' (highly interlinked) statements. The identified patterns subsequently served as the basis for constructing a hierarchy of nodes in NVivo where the interviews transcripts were managed. Thus, the two

¹ For more information regarding Decision Explorer visit: www.banxia.com

models in Decision Explorer and NVivo were used interchangeably, which informed the structure of our discussion.

Discussion of findings

During the two years of this empirical study we interviewed members and coordinators of six top-down attempts to organize ‘learning networks’ that were intended for practitioners from different health boards, and the majority of gathered empirical material comes from two networks in the area of dementia (one dedicated to leadership and one dedicated to ‘best practice’) and one network dedicated to patient safety and improving treatment of sepsis. Practitioners appreciated that they belonged to the same landscape of practice (be it treatment of dementia or sepsis), and they recognized that it was essential for them to learn from each other. In most cases, the coordinators expected that the broader networks could become CoPs through sharing knowledge about leadership or ‘best practices’ in medical treatment. Thus the networks’ coordinators initiated designed inter-organizational learning as health boards established new official channels for interaction by allocating dedicated network coordinators, staff time, communication technology, building shared document repositories and hosting engagement events. They wanted to build their networks online, as they believed that this would allow dispersed practitioners to interact regularly.

In principle, practitioners agreed that the various inter-organizational initiatives gave them easy access to high quality codified knowledge from other health boards. However, some of the CoPs-to-be suffered from being too strongly associated with technology: they were seen more as a website rather than a community, or their leaders did not do enough to connect a core group of people who were *already* genuinely interested in the given set of problems, and who could drive the community’s learning. Moreover, in a small leadership network in dementia with 14 members, practitioners who had been invited to the network felt that it was dominated by the assigned coordinators, and so practitioners avoided sharing knowledge due to lack of trust in the coordinator. The designed inter-organizational learning initiative did in fact spark emergent trans-organizational learning, albeit, in spite of the top management, practitioners used their own emails rather than the dedicated website to think together about real-life problems that they cared about.

Another observed example of a practitioners’ network falls under the Scottish Patient Safety Program (SPSP) which is a high profile Scotland-wide initiative aimed at improving the safety and reliability of healthcare. One of the priority areas that SPSP deals with is

sepsis, and in this area a network was developed to support sepsis professionals from the 14 Scottish health boards. The core of the network comprises representatives from different hospitals and specialist units participating in the SPSP who regularly learn from each other about their sepsis-related practices, and who are thus called the *collaboratives*. The life of the network includes monthly videoconferences with around 150 observers, contributions to the network's website and document repository, and convening of two large conferences dedicated to sepsis. Whilst the SPSP network is a top-down initiative, it also gives practitioners enough space to 'think together' about problems and hot-topics which they care about, and so foster trans-organizational learning. Although not all sepsis professional participate in the network regularly, for example due to time or budget constraints, the network supports its members in running small interdisciplinary groups in their own local settings during which practitioners consider how the learning from the larger network can be implemented through gradual cycles of improvement in their workplace, and then the results are fed back to the network. In other words, the collaboratives engage in emergent trans-organizational learning within the context of designed network (inter-organizational learning), and thereby acts as boundary brokers when, with the legitimization and support of network coordinators, they help to translate what they have learnt from practitioners from other health boards in their local communities.

Commentary

The conceptualization of trans-organizational learning in professional landscapes of practice leads to highly relevant insights for both the academic and practitioner audience. It is clear that there exist strong interest in the notion of how organizations learn from each other, especially in today's world where organizations increasingly collaborate and engage together in collective strategy making, as they form joint alliances, and as they pool one another's' expertise to create new products and services. Trans-organizational learning, as a concept, helps to refine that language, and although this concept is not intended to replace the established concept of inter-organizational learning, as it is evidenced in this paper, the two concepts can be used fruitfully alongside each other and their explanatory powers are considerably higher this way. Thus, trans-organizational learning does not complicate the field of organizational learning, but it usefully complexifies it as it helps to appreciate and distinguish between the nuances of emergent and designed learning interactions, especially with respect to self-governed CoPs which may remain hidden in the shadow of official alliances and institutionalized collaborations.

Furthermore, trans-organizational learning invites practitioners and managers to revitalize the debate about implications of trans-organizational characteristics of CoPs. We argue that it is not sufficient to say that socially developed knowledge may occasionally leak across traditional organizational boundaries; instead, we suggest that without such trans-organizational ‘leakages’ happening in both ways, CoPs risk being disconnected from their broader landscape of practice and thereby lose touch with how that landscape is changing and evolving. Along similar vein, we argue that organizations depend on trans-organizational CoPs for developing organizational learning because they are potent to engage in double- and triple- loop learning, and they can prove valuable in balancing the exploration and exploitation of learning. For this reason, we advise managers not to constrain trans-organizational learning due to concerns for leakages of knowledge, but instead they should capitalize on it. Hence, following the Steve Jobs’ famous advice (cited by Davenport & Prusak, 2000, p. 50): the best what managers can do is to hire smart people and ask them what needs to be done. After all, landscapes of practice, just as the nature of human knowledge, are always changing, and so in order to cope with the realities of complex, messy, and increasingly interlinked organizations, people need to be increasingly prepared to engage across their landscapes of practice with practitioners belonging to other institutions.

It would perhaps be an overstatement to say that we cannot talk of successful organizational learning unless it supports trans-organizational CoPs, but we are confident to claim that in the next decades those organizations which excel at making most of their employees’ knowledge will be those which are bold enough to encourage their people to engage with the world, challenge it, strive to understand it better, take risks, accept the teachings of others, and effectively grow as competent professionals in communities of likeminded professionals. This is precisely what we attempted to capture with the idea of trans-organizational learning.

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