THE ROLE OF ORGANISATIONAL BEHAVIOUR IN ESTABLISHING A CORPORATE ACADEMY IN THE CONSTRUCTION INDUSTRY

by

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Submitted in partial fulfillment of the requirements for the degree
Doctor of Philosophy in Organisational Behaviour
in the Faculty of Economics and Management Sciences

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UNIVERSITY OF PRETORIA
DECEMBER 2013

ABSTRACT

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The purpose of the study was to explore the role of organisational behaviour in establishing a corporate university in a large corporate in the construction industry. Studies have been conducted regarding the process steps in establishing a corporate university but a gap exists in the cohesive presentation of the various relationships and the behaviours that drive the successful implementation and sustained operation of a learning academy. An understanding of organisational behaviour at three levels (individual, group and organisational) is a critical success factor that provides the superstructure to the firm foundation provided by the right process steps.

An in-depth, single case study research design was used by the researcher taking a qualitative approach from a complete member researcher perspective with an analytic autoethnographic orientation. Data collection comprised archival document review and semi-structured, in-depth interviews with senior executives and leadership on other levels in the organisation. Analysis was conducted with the assistance of a qualitative data analysis computer software package as well as through iterative coding and memo writing to surface patterns and themes.

The study resulted in a framework reflecting a complex web of relationships and roles that included: context as a catalyst; leadership as a critical role player; academy structure as a key driver of learning; individuals as recipients and beneficiaries; key stakeholders and internal role players in the implementation of learning; and finally, organisational culture as the normative domain. The study concludes with propositions that encapsulate these relationships.

The framework presenting a complex web of relationships and roles has expanded the existing theory of organisational learning by integrating and incorporating organisational behaviour theory to understand the role that behaviour on individual, group and

organisational levels plays when establishing a corporate university. In addition, the framework provides insight into the role of an academy in promoting a culture of learning.

Organisations can benefit from an insight into the behaviours which underpin the establishment of a corporate academy because such insight will more readily lead to successful implementation and the avoidance of costly mistakes. A corporate academy plays a key role in assisting organisations to build essential skills and capabilities particularly in times of increasing demand for competent and capable employees to execute strategy. The single 'revelatory' case study approach was conducted due to the unique opportunity presented when the researcher was tasked with establishing a corporate university in a large corporate in the construction industry.

Key words: corporate university, corporate academy, organisational behaviour, learning organisation, organisational learning, culture of learning

DECLARATION OF ORIGINALITY

I, Janet Brumme, declare that the study on

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is my own work. All the resources used for this study are cited and referred to in the list of references by means of a comprehensive referencing system. I declare that the content of this thesis has never been used before for any other qualification at any tertiary institute.

_____
Janet Brumme
7 December 2013

ACKNOWLEDGEMENTS

I would like to acknowledge my employer, Group Five, for the permission granted to use the organisation as a case study, and to the leadership, management and employees who so generously gave of their time and did not hesitate in giving their feedback. To our CEO, Mike Upton, my gratitude for his belief that organisational learning is not only possible but that it makes a difference, and for the pride that he takes in the Group Five Academy.

I owe a debt of gratitude to the Academy team, who helped create a world-class corporate university and turned the journey into an adventure. Thanks to the team who made the Academy a success: Neshan Sukdeo, Karen Nell, Natasha Carstens, Nandisa Tsutsu, Chantelle de Bruin, Prudence Chauke, Goodness Kubheka, Jeffrey Govender, Kathy Raffray, Sweetness Vorster and Jan Borman. A special thanks to Jacques le Roux, the Academy co-founder – his dedication and commitment to learning and development is inspiring.

I would like to sincerely thank my supervisors, Professor Yvonne du Plessis and Professor Stella Nkomo. Yvonne for her boundless optimism and constant encouragement, and Stella for pushing me to improve when I thought I could not.

To Rika Weiss who edited the entire document, my thanks for the prodigious attention to detail and the many constructive comments.

Thank you to my family, who understood when I missed special events or forgot things a mother should remember. I need to single out my son Greg and his wife Chelsea for the endless hours spent capturing references, filing and sorting academic papers. To my younger son, Gavin, my thanks for the pep talks when my energy was flagging – I sometimes wondered who the parent was! (As a gentle reminder of my priorities I became titled "Dr Mom".)

And finally, I would like to thank my dear friend Michael who was there for me when I could not fathom why I had chosen this path, and who listened patiently and asked all the right questions.

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We concur with the following statement generally attributed to Einstein: "Any intelligent fool can make things bigger, more complex, and more violent. It takes a touch of genius – and a lot of courage – to move in the opposite direction." Einstein's challenge is relevant to organisational learning [OL] theorizing. Returning to the tree metaphor, the image we have in mind is of a tree that can support many different branches on which there is a multiplicity of leaves. The leaves connect through their different branches back to the trunk. And the trunk is grounded in a root system that extends widely, thus ensuring a strong, stable base and providing nourishment for the entire system. If the leaves are not well connected to a branch, the trunk and root system will not flourish and eventually will wither away. A trunk with insufficient branches and branches with insufficient leaves will not grow and develop. A theory of OL is more about a well-grounded trunk than it is about adding to the complexity of branches and leaves. Indeed, adding more branches and leaves creates the need for an even stronger and sustainable trunk and base to support them. We need a robust OL theory.

Crossan, Maurer, White (2011:454)

1   INTRODUCTION

1.1   Introduction to the chapter

The focus of this research is the role of organisational behaviour in the establishment of a corporate academy within a large construction organisation based in South Africa.

This chapter provides an introduction to and motivation for the research. The relevance of the research context is discussed to provide a backdrop to the case study and to place it within a time perspective, the economic environment and the industry. This is followed by a summary of the problem statement and an outline of the perspectives and objectives that provided the focus for the study. The research question provided the guidance for the research undertaken over a five-year period and is succinctly stated. The benefits and the importance of the study are discussed along with the positioning of the contribution made to the body of knowledge. The research approach and design are introduced with a brief description of the explanatory case study genre and the extent of the researcher's involvement. The theoretical basis for the study as well as the positioning and integration at a meso level are described and depicted diagrammatically. The assumptions underpinning the study are discussed and clarified. *Definitions* of key terms are provided and some core *assumptions* are highlighted. The chapter concludes with an outline of the thesis *structure*.

1.2 Motivation for the research

In 2006 the construction sector was entering a period of considerable growth and facing a globally widespread skills shortage of both artisans and engineering expertise (Cape Argus, 2006; Lawless, 2005:4; Engineering News, April 13-19 2007:16). Without the requisite skills, corporate growth would be constrained along with corporate profits.

The organisation today:
Group Five is an integrated construction services, materials and infrastructure investment group which was established in 1974 and operates in over 20 countries with more than 10 000 people in its employ. It has a Construction Industry Development Board (CIDB) Level 9 rating and a Level 2 Construction Charter Broad-Based Black Economic Empowerment (BBBEE) rating. In 2009 revenue peaked at R12 billion.

The Group structure comprises four clusters: Investments and Concessions, Manufacturing, Construction, and Engineering and Construction. These clusters target seven sectors, which include mining, power, oil and gas, water and environment, real estate, and transport. The geographical footprint of the Group includes South Africa and Sub-Saharan Africa, as well as Eastern Europe. Key projects include a range of well-known contracts related to the 2010 FIFA World Cup^{TM}, such as the Moses Mabida Stadium and King Shaka International Airport in KwaZulu-Natal.

In anticipation of the construction boom, the Group Five Academy was launched in August 2006 based on the thinking that improved operational capacity and business know-how were required to best position the Group to take advantage of bigger and more complex projects. People development is the cornerstone of Group Five's vision and the foundation of its long-term view of sustainable economic development. It is also one of the Group's seven values, as is excellence, and that is why the Group is committed to providing resources for the learning and development of employees. In the 2012 financial year, the Group's training expenditure was R37,9 million on 17 234 training interventions.

The challenge: July 2006

On my first day at work I was faced with an empty office, and the task assigned to me was to set up a corporate academy at Group Five, one of South Africa's largest construction companies. The intended outcome was to build skills and competence that would support the planned growth of the organisation (Group Five, 2006:64,83).

The outcome: 2011

Five years later, a corporate academy with 11 staff members has been successfully implemented, and it has received widespread recognition and accolades from senior management and employees. Its cumulative expenditure has been almost R150 million on training and development over the five-year period. In the first year over 6 000 people attended the training interventions, and in the period of this research the number increased to over 14 000 attendees per annum. These training interventions spanned a range of programmes, from leadership development to technical development, and were attended by skilled and unskilled individuals.

The research: 2006-2011

The purpose of the research conducted over a five-year period was to identify and examine the behaviours at all three levels (individual, group and organisational) that were supportive of the successful establishment of the corporate academy. The goal was to understand how the Group Five Academy was implemented and how it became a fully-fledged entity. For the purposes of this research the Group Five business units comprising the *construction cluster* were selected for study as they are responsible for more than 80% of the revenue, and hence they are effectively where the main focus of the business lies.

1.3   Context of this study

1.3.1   South African economy and infrastructure development

The economy of South Africa and the quality of life of the population depend heavily on the supply and efficient operation of infrastructure. Adequate infrastructure

contributes in large measure to poverty alleviation, reduction in unemployment and improved service delivery (Lawless, 2005:14).

For South Africa to be competitive on a global scale, steps need to be taken to create a diverse, well trained and multicultural workforce (Engineering News, 2007:16). Lawless (2005), in a study of the state of engineering and related technical skills in South Africa, notes that:

> Research indicates that many fundamental activities relating to the attraction, education and training of professionals are no longer in place or are inadequate. No long-term planning has been carried out. Furthermore, solid workplace training and the value of experience have been disregarded as a result of the 'lean-mean' business model of the nineties and this century. … The challenges facing South Africa are exacerbated by the legacy of Bantu Education and apartheid, the brain drain, and the need for rapid transformation.
>
> Lawless (2005:4)

The challenge was and continues to be that the construction industry faces a considerable challenge in attracting, recruiting and retaining the technical expertise and skills needed to design, manage and deliver on this infrastructure development (Engineering News, 2007:16-17; Lawless, 2005:3).

According to Lawless (2005:14), the consequences of not taking action to address challenges in the construction industry, specifically regarding skills, include:

- Non-delivery (on infrastructure development) and poverty becoming endemic in South Africa
- Infrastructure services (especially water and sanitation), required to prevent waterborne diseases, becoming rife
- Gridlock on roads and congestion in ports, severely impacting trade
- Growth rate of 6% and job creation would not be possible, possibly impacting on political instability
- Poor or absent services in municipalities, possibly leading to unrest and violence

The bigger picture perspective on the need to develop skills and capacity was also reflected in legislation and policies.

1.3.2   Skills development legislation and policies

At a government level there was an early appreciation of the challenges faced with regard to education from grassroots upwards. Educational and skills development legislation and policy have become major forces in driving and steering skills development, broadly as well as in the construction sector. Relevant Acts in the period of the study included the Skills Development Act, 1998 (Act 97 of 1998), the Skills Development Levies Act, 1999 (Act 9 of 1999) and the South African Qualifications Authority (SAQA) Act, 1995 (Act 58 of 1995). The SAQA Act was later amended to become the National Qualifications Framework (NQF) Act, 2008 (Act 67 of 2008).   These three Acts have impacted significantly on the educational environment in South Africa. In addition, the Codes of Good Practice on Broad-Based Black Economic Empowerment in the Construction Sector (gazetted in June 2009, and commonly known as the Construction Charter) influence and structure the reporting on seven elements, which include enterprise development and management and skills development aspects of organisations in the industry.

The establishment of Sector Education and Training Authorities (SETAs) in accordance with the directives in the SAQA Act of 1995 has created a platform where all stakeholders in the respective sectors can consider relevant issues and can plan investment strategies in training and development in the sector as a whole in South Africa. The imposition of the Skills Development Levy as a consequence of the Act has made available a pool of money which can be utilised to support training in organisations through the mechanism of grant schemes according to which levies can be reclaimed. This has compelled organisations to put in place systems and procedures to systematically plan and report on their training initiatives, to access funds, and from a charter perspective it has enforced a review of equity spend on training.

The levels of complexity in managing compliance with the various acts and codes led to the realisation by senior leaders in the organisation that specialised attention was

needed to facilitate compliance whilst at the same time maximising the advantage to the organisation.

1.3.3   Addressing education and skills challenges

The intention of the Skills Development Act (1998) and the Skills Development Levies Act (1999) was to be the means to redress past, politically oriented educational policies, with the Sector Education and Training Authorities (SETAs) playing out the role of process facilitators. The objectives of the NQF, as stated in the NQF Act (2008) (and previously in the SAQA Act of 1995), are summarised below:

- Create an integrated national framework for learning achievements.
- Facilitate access to, and mobility and progression within, education, training and career paths.
- Enhance the quality of education and training.
- Accelerate the redress of past unfair discrimination in education, training and employment opportunities, and thereby
- Contribute to the full personal development of each learner and the social and economic development of the nation at large.

Progress on a number of these objectives was slow and there was clearly a need to increase the acquisition speed and quality of particularly technical skills across a broad audience (The Presidency, 2010:10,14), and this resulted in the formation of the Accelerated and Shared Growth Initiative for South Africa (AsgiSA) in February 2006 and the Joint Initiative on Priority Skills Acquisition (JIPSA) in March 2006 – both sponsored and initiated by government in recognition of the dire skills crisis faced by the whole country. The stated goal of JIPSA was to focus the attention of a wide range of social partners and project owners on critical aspects of the skills landscape in South Africa (The Presidency, 2010:3). For the construction sector this meant support for the development of a cross-section of technical and scarce skills from the bottom up (Lawless, 2005:15-16).

For the construction industry in particular, the root cause needed to be addressed, which implied long-term solutions, and Lawless (2005:15) suggested the following human capital 'supply chain' requirements:

- High-calibre matriculants
- High-calibre graduates from tertiary institutions
- Entrants into the profession
- Employment opportunities and workplace training
- Projects to sustain employment of the human capital in engineering
- Continuing professional development

These solutions are notably long-term and require the concerted and co-ordinated promotion and support of government. Given that the skills shortage was an immediate and pressing challenge impacting on the ability of organisations to compete, and given that competition was both local and global (east and west), the inescapable realisation was that organisations could not wait for government action or policy to potentially solve the looming crisis. Group Five needed to take rapid action to take advantage of the impending super cycle in the construction industry.

The fact remains though that growth of technical skills takes time and extensive financial resources, and as a starting point South Africa's traditional educational institutions do not adequately provide the pool or level of human capabilities required by businesses in a new era hungry for skilled people (Lawless, 2005:4; The Presidency, 2010:3,25,50). The issue then remained for Group Five to take responsibility to expand and accelerate the development of skills and capacity in a cost-effective manner and as fit-for-purpose as possible to meet immediate and short-term business needs, as well as skills and capacity required in the longer term.

This was the point of departure in 2006 for the organisation, prompting the launch of the Group Five Academy.

1.3.4   A corporate dilemma

When viewing these macro forces and the challenges in the construction industry, Group Five decided to take action to make sure it had the requisite skills and capacity to achieve the vision of being an exceptional provider of building, infrastructure and engineering solutions both in South Africa and on the African continent (Group Five, 2006:4). In a very competitive industry, Group Five held a position as one of the top five largest construction companies in South Africa, with a headcount of over 10 000 people, but it needed to face the challenges of adapting to a rapidly changing environment to maintain its position and grow market share. As noted in the 2006 Annual Report (Group Five, 2006:55): "Positive economic and political developments are generating double-digit industry growth and a sustained upswing is anticipated, returning the South African construction industry to levels of activity not seen since the 70s and early 80s".

The sector, as well as the organisational needs, were viewed holistically by senior management from a learning and development perspective. The whole pipeline of skills was scrutinised, from the need to absorb new entrants into the business in an effective manner which would positively influence their initial impressions of the organisation, to the need to ensure that workplace learning and continuing professional development were addressed in a sustainable manner. These initiatives were seen to be linked directly to the strategy of the organisation to attract, develop and retain human capital in a very competitive environment in order to achieve challenging strategic objectives. In reality, the revenue of the organisation trebled during the period of the study, reflecting the enormity of the capacity requirements and challenges facing leadership in 2006. A real solution to fast track people development was needed.

With approval of the board, the Group Five Academy was established in July 2006.

1.4 Problem statement, perspectives and objectives of this study

Corporate universities are becoming more prolific in large corporates across the world for a number of reasons (as discussed in 3.5.1), but the initial core reasons for Group Five included the need to meet pressing company-specific skills requirements and to fill gaps left by traditional education (Andreson & Irmer, 2000; Holland & Pyman, 2006:20) in an economic environment that was showing every indication of rapid growth.

The existing literature on establishing corporate universities has been dominated largely by process steps that provide prescriptive 'recipes' for the establishment of corporate universities (Grenzer, 2006; Meister, 1998; Wheeler, 2005). For example, it typically suggests variations of the following types of steps: form a governing body; craft a vision; determine a funding strategy; identify stakeholders; develop products and services; compile a technology strategy; devise a measurement system; and put together a communication strategy. Whereas this literature provides valuable guidance it can be considered the 'supporting skeleton' of the corporate university. The missing element is the need for an understanding of deeper-level behaviours, roles, attitudes, feelings, perceptions and relationships that are the 'soft tissue', 'muscles' and 'living organs' which give life and sustainability to the corporate university. Many organisations have failed in the implementation of their corporate universities, in spite of the ready access to the various 'success recipes' available. This would indicate that a more holistic approach to establishing a corporate university is required.

The purpose of this case study research was to use an organisational behaviour lens to identify what behaviours (at all levels: individual, group and organisational) impacted on the successful initiation and establishment of a corporate university. *A priori,* as the researcher, I believed the key elements included: an organisational culture oriented to learning; the influence of leadership behaviours; and behaviours of those assigned as custodians of learning in the organisation.

In terms of boundaries for the scope of the study, perceived contributing behaviours determined or deemed significant by those interviewed (senior executives, managers

and individuals) as well as behaviours perceived by the researcher as emerging from archival records will be utilized as a basis for research. Tangible boundaries include the limitation to 5 years from the initial commencement as well as restricting the study to those business units comprising the construction arm of the organisation.

1.4.1 Objectives of this research

The objectives of this research were delineated as follows:

- To examine and explain the role and importance of managing organisational behaviour in the establishment of a corporate university
- To develop an organisational behaviour framework for the establishment of a corporate university from inception to a fully-fledged entity

1.4.2 Specific research question

A multitude of initial research questions were refined to a single question:

- What is the role of organisational behaviour (at all three levels: individual, group and organisational) in establishing a corporate university?

1.5 Importance and benefits of the study

A definitive and significant contribution is made in a *revelatory* case offered by the unique opportunity of being a complete member researcher integrally involved in the start-up and establishment of a corporate university in a large organisation.

The significance of this study lies in providing an organisational behaviour perspective that enriches and adds a new dimension to efforts to establish a corporate university, a venture that typically costs organisations many millions in sunk costs, and which, if implemented well, can go on to save the organisation a great deal of money, and in fact can support a sustainable future for the organisation through the development of skills and capacity to achieve organisational strategy.

The single case study provided in this research could be considered a 'prototypical case' (Djuric, *et al.* 2010), a 'unique' or 'revelatory' case (Yin, 2009:47-48) as there are no published studies of this nature in Southern Africa. Available literature

focuses on identifying the process steps and principles for such entities (Grenzer, 2006; Meister, 1998; Wheeler, 2005) but has not shed light on the complex relationships (individual, group and organisational) between the various role players. Thus, the findings from this research have significant resource and solution implications for the increasing number of organisations seeking to establish corporate universities.

The contribution of this thesis lies firstly in an **organisational behaviour framework** (Chapters 4 to 10 and summarised in Figure 17 on page 99) that reveals the behavioural aspects to be considered when embarking on setting up a successful corporate learning academy. These behaviours were brought to the surface through the gathering of supporting evidence from the most senior levels of management and other key stakeholders in the multi-billion rand organisation. This evidence, in conjunction with archival documentation analysis, was used by the complete insider researcher to formulate a framework that established the importance of six key themes; the impact of the *context* on the motivation to learn and create a *culture* of learning by the organisation, as well as the part played by the behaviour of various *key role players,* including senior *leadership*, the *Academy team*, *human resources managers*, *learning and development officers*, *line managers* and finally, *individual learners*.

These themes are considered at the different organisational behaviour levels as reflected in Figure 18: OB (organisational behaviour) levels in web of relationships (p. 101). At an individual level, the 'individual learner' is the recipient and beneficiary of learning initiatives and needs to play an active participatory role. The individual learner is supported by a number of key role players at a group level, including the learning and development (L&D) officers, human resources (HR) officers and line managers. These role players need to create the opportunities, development plans and a learning environment which, through numerous iterations, can develop learners who can ultimately create a critical mass of change which will lead, at an organisational level, to a change in the organisational culture to one which is more learning oriented or, in fact, to an organisation that could be deemed a learning organisation. The Academy, at a group level, has a key role in driving learning in the organisation.

The critical catalyst for learning in organisations is the context or environment of the organisation in which it competes. Competitive advantage in organisations is achieved through the fulfilment of a carefully honed strategy, and since the main goal of the corporate university is to support organisational strategy, understanding the ramifications of the organisational environment has considerable significance to ensure corporate university (CU) relevance.

Secondly, a set of **propositions** are provided (see Chapter 12) that may be tested in future research. These propositions, whilst still untested, can also provide valuable guidelines to organisations to consider when planning and implementing a corporate university. A more holistic approach – which goes beyond the process steps to the more intangible behaviours that need to be considered at all three organisational behaviour levels – stands a better chance of success and longevity.

The contribution lies on two levels: theoretical and practical (as discussed in depth in Chapter 12). The contribution is enriched by a thick description of the behaviours at all three the organisational behaviour levels (individual, group and organisational), which are essential in establishing a corporate learning academy.

1.6   Research design, methodology and scope

The research used a single revelatory case study research design (Yin, 2009:48) and examined in detail the establishment and subsequent operation of the corporate academy in Group Five.

1.6.1   Duration of study and influencers of the lens to be used

The focus of the study was an organisational behaviour perspective across three levels – individual, group and organisational. There are a number of factors at an organisational level, as well as more widely at a macro level, that impact on behaviour (see Figure 1 below). Within this meso level, influencers include the legal and regulatory environment as well as the changes over a period of time. Similarly,

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the economic cycle that was particularly dramatic in the period of the study, the external stakeholders (including government and shareholders), and the construction industry as a whole, of which the organisation in the study was one of the top five in South Africa, had a role to play. The study spanned from the Academy's inception in July 2006 through to July 2011 – comprising a total of five years.
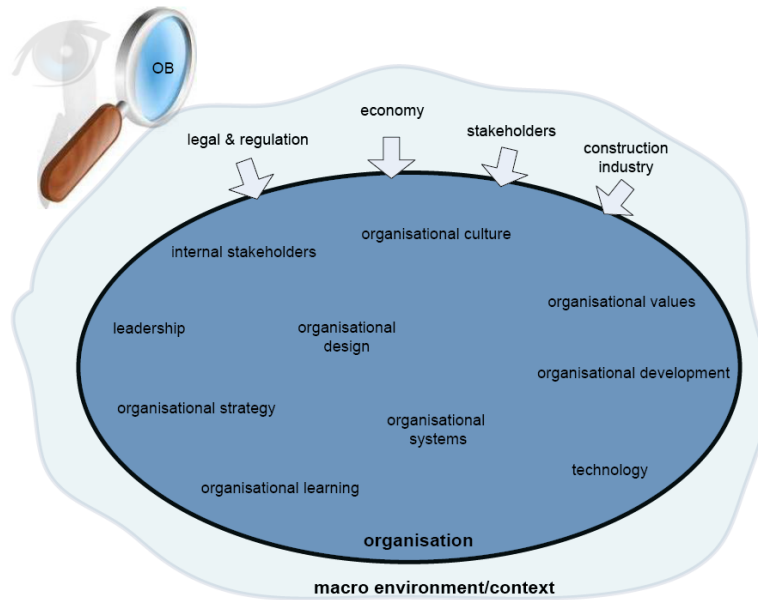
Figure 1: **Context and influencing factors in the research case**

1.6.2 Research design and methodology: a qualitative study using case study research design

The research design selected was a case study which is an appropriate design when attempting to understand answers to questions of 'how' and 'why'. Although a case study is viewed as a qualitative inductive approach without an *a priori* hypothesis, it is important that a research begins with guiding questions which in turn frame the boundaries of the case (Yin, 2009). The question, as stated in section 1.4.2, provided the boundaries for the study.

A single case study research design (Eisenhardt & Graebner, 2007:27-30; Yin, 2009:48) was chosen due to the unique circumstances of setting up a corporate university from non-existence to a successfully functioning and stable entity. The researcher was given the responsibility of setting up the corporate university in Group Five, a relatively unique opportunity, with the additional benefit of having an

'insider' role and perspective. Limitations to a single case study are discussed later in this thesis.

Critical realism was the basis for the research philosophy framework (Bhaskar, 1998; Fleetwood, 2005:1-2; Sayer, 1997:484), and *grounded theory* provided the overarching data collection methodology (Charmaz, 2010:4; Eisenhardt & Graebner, 2007:30; Guba & Lincoln, 1994:110; Strauss & Corbin, 1994:273) with the intention of building theory through an inductive approach. Acknowledgement is given that theory built from a single study is not generalisable and requires further testing, and it must be noted that this study does not intend to, or, in the end, provides generalisations. The focus of this case study is to reveal the behaviours, attitudes, perceptions and feelings experienced at all three organisational behaviour levels, in order to determine what contributed to the successful implementation of a corporate university in a large company. A framework and a set of propositions are provided as guidance for other organisations following a similar path, as well as to serve as the basis for further research (as discussed in Chapter 12).

The output of this thesis is a detailed case study (Chapters 4 to 10) based on thick descriptions (Strauss & Corbin, 1994:274,278) gained from multiple sources of evidence, such as archival records, interviews and complete member researcher input.

Data was collected through interviews and archival documents. In the interview process, conducted according to a semi-structured interview guide, the top executives, including the Chief Executive Officer (CEO) and the Chief Financial Officer (CFO), were interviewed, along with the managing directors, HR directors, L&D officers, line managers and learners of three business units. These key business units within the construction cluster of the Group are responsible for over 80% of the organisation's revenue which totalled over R49 billion (Group Five, 2011:46-47) over the five-year period of the study. In addition, a focus group interview was conducted with the learning and development officers of the three construction cluster business units, as well as video interviews with a number of learners and their line managers who had experienced first-hand engagement with Academy programmes.

Data from archival documents spanning the five years, such as minutes of meetings, internal publications and annual reports, were collected and analysed, and memos were written to extract key topics that could potentially inform the role of behaviour in the formation and growth of the corporate university.

The researcher, as a complete member, selected the documentation and records, and also selected the interviewees. Both these sources of data were subjected to open coding followed by axial coding and core category identification. This analysis process was supported with a content analysis software instrument called Nvivo®, as well as the use of Microsoft Excel. Both data sources (interviews and archival documents) were subjected to a process of triangulation and constant comparison.

The final write-up phase was supported with the use of a software package (Rationale®) that aided the structuring of the case study as well as the argumentation underpinning the research report.

1.6.3   Role of the researcher: complete member researcher

Employment of the researcher at Group Five commenced in 2006 with the express intention of establishing a corporate university. The position was specified as a senior position, and very soon it was established that this was a necessary requirement due to the degree of influence required to achieve the goals allocated.

As the incumbent, I indicated in the pre-employment interviews my intentions to advance my studies, and, at this early stage, agreement was already established. In my subsequent role, my position gave me ready access to the most senior levels in the organisation.

The case study research was conducted from the position of an 'insider'. Capturing this positionality within possible qualitative research methodologies is rather complicated. As a researcher, who also had a major responsibility in implementing the corporate university, I did not fall into the true 'participant observer' or 'outsider' category. According to Brannan and Oultram (2012:296), a definition of a participant

observer is a specific approach to "gaining knowledge based on direct contact between the research and the social objects of interest".

My role was rather one of 'insider' who was also attempting to simultaneously adopt an objective 'outsider' perspective (Parry & Boyle, 2007:186-7; Tietze, 2012:61-63) to improve theoretical and practical understanding of the start-up and implementation of a corporate university. In other words, my approach did not fit that of a participant observer, nor was it best captured as an ethnographer in the traditional sense (Brannan & Oultram, 2012:297). Rather, it fitted most closely with what is known as an autoethnographic approach.

Broadly speaking, *autoethnography* is defined as "a form or method of research that involves self-observation and reflexive investigation in the context of ethnographic field work and writing" (Maréchal, 2010:43). There are many types of autoethnography (Parry & Boyle, 2009:186), however, the approach taken in this study is analytic autoethnography in the sense that the research holds what Anderson (2006:378) refers to as 'complete member researcher' status. In other words, the researcher is a complete part of the social world under study (Anderson, 2006:381). This is in contrast to the traditional emotive autoethnographic approach which centres on the researcher's personal experience of a phenomenon (Ellis, 2000:24). A complete member researcher, as opposed to a participant observer or evocative/emotive autoethnographer, has more of an interest in the beliefs, values and actions of other group members (Anderson, 2006:389).

Anderson (2006:375) describes analytic ethnography as ethnographic work in which the researcher is (i) a full member in the research group or setting, (ii) visible as such a member in the researcher's published texts, and (iii) committed to an analytic research agenda focused on improving theoretical understandings of broader social phenomena. Hence, while I share my reflections about what transpired over the five years, the methodology, analysis and findings are mainly based on data collected from others who were role players or recipients in the establishment and implementation of the corporate university. Thus the research design combines case research methodology with analytic observation to understand the organisational behaviours needed to implement a corporate university.

Due to my discomfort with making bold claims based on subjective interpretations, I initially attempted to 'mitigate' my subjectivity through the number of interviews conducted and the extent of the archival documentation that was scrutinised. I did, however, come to the realisation that, due to both my relative positional power as Head of Academy, and the extent of my ability to influence the decision-making processes relating to the establishment of the Academy, I would need to make myself 'visible' (Anderson, 2006:383-4) as a key role player in the case study. The analysis of the data was influenced by my role in the analytical autoethnography by way of the interpretation of the data and the subsequent synthesis of the case study themes presented (Chapters 5 to 10).

To further raise the visibility of my input and contribution as the researcher in the study, reflexivity points are indicated at the conclusion to each of the case study chapters in the form of 'reflections' blocked off from the body of work by text boxes as indicated in the example below in Figure 2: Example of reflexivity points.

Researcher's reflexivity points:

My input into the direction the Academy took:
In the planning stages, the scope of the Academy …
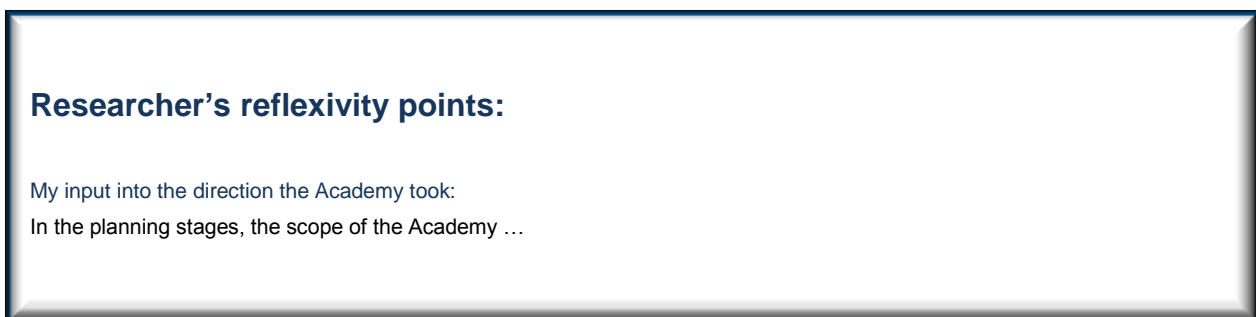
Figure 2:   Example of reflexivity points

Benefits to being a complete member researcher include ready access to both the relevant people and data, a thorough understanding of the complexities of the business from a 'people and processes' perspective and the knowledge of where pertinent data can be sourced.

1.6.4   Rigour of the research

The complete member researcher data collected during the course of the establishment of the corporate university included notes, reflections, review of archival documents as well as interviews. Collection and analysis of data needed to be managed with rigour. The four elements for establishing rigour in qualitative research are credibility, transferability, confirmability and dependability (Guba & Lincoln, 1982:246-7).

Credibility is evaluated through the correlation to the actual reality, and in this research the wide range of data collected through interviews and archival documents provided a thorough reflection of reality through triangulation. Yin (2009:114-118) has stressed the use of multiple sources of evidence as an important means of ensuring 'validity' and reliability' in case study research. In this research study, multiple sources of evidence were utilised, as discussed in Chapter 2 which gives details of the process steps followed.

Transferability relates to generalisability, and, in a single case study such as this there is less support for transferability unless matched to the concept of data saturation, which then provides a good argument for transferability. Since the intention was to gather thick descriptions for a unique case, resulting in a framework providing a network of relationships, this research study can be used as a benchmark for future studies.

Confirmability is a reflection of objectivity. As a complete member researcher having been involved from the outset of the establishment of the Academy, a potentially high degree of subjectivity contributes to the findings of the study. Selection of data and interpretation in the analysis phase are influenced by individual values. Transparency from the researcher is necessary regarding research philosophy and perspectives, along with keeping meticulous records of sources of data collected, transcripts and memos. Case study detail, interview transcripts, archival documents and memos are available electronically, which allows readers to review base data and the analysis process. Access information is provided in Appendix A.

Dependability refers to replicability which impacts on the reliability of the study. If the study were to be replicated would the outcomes be similar? In order to promote dependability, all processes were documented, data bases kept up to date and chains of evidence maintained. The use of a content analysis tool (Nvivo®) to code interviews provided additional transparency with regard to data analysis.

1.7   Theoretical foundation

In the initial phases of the research it was believed that core theoretical areas would include the following: organisational culture where it intersected with organisational learning; the influence of leadership behaviours; and the behaviours of those assigned as custodians of learning in the organisation. The overarching theme contained in all these areas is that of organisational behaviour at three levels, namely individual, group and organisational.

As a broad foundation underpinning all the concepts in this study, **culture** is established through patterns of basic assumptions, invented, discovered or developed by a given group as they respond to the external environment (Schein 1990:111). These responses are then communicated to newcomers. In simple terms, culture is described as 'the way we do things around here', which has implications for organisational learning, which in turn fundamentally implies doing things differently. This suggests that 'the way we do things' needs to be improved or at least changed, and thus the need for learning to take place.

Argyris and Schon (1978:19) describe **organisational learning** as being learning conducted by individuals resulting in it cumulatively becoming embedded in the organisational memory. Catalysing the learning of the individual requires the right support, content and direction (Fiol & Lyles, 1985:803; Huber, 1991:88; McGill, Slocum & Lei, 1992:10-11; Senge, Kleiner, Ross & Smith, 1994:341-2).

The **corporate university** has increasingly been seen as a vehicle for galvanising and stimulating an organisation into a state of constant learning and of developing

people capable of adapting to rapid change to achieve radical business results. It is viewed as a hub for the exchange of ideas; the generation of learning (formal and informal); and for using new ways of teaching to facilitate discontinuous innovation. From a 'people' perspective, the corporate university is seen as critical to meeting talent and competitive challenges so prevalent in today's business society (Holland & Pyman, 2006:21).

Campbell and Dealtry (2003:368) have noted that in the 'global free market' there is acceleration in the need to grow corporate knowledge through individual development to achieve competitive advantage resulting in greater profits. They note specifically that organisations that can harness corporate university processes will engender the right corporate environment to motivate individuals to innovate and deliver growth investments for the future.

Yet, the research that has been conducted on corporate universities has tended to focus on the process steps in establishing a corporate university (Grenzer, 2006; Meister, 1998; Wheeler, 2005) but a gap exists with respect to the various relationships and the behaviours that drive the successful implementation and sustained operation of a corporate academy.

Literature and research defining and conceptualising **organisational behaviour** as a domain of study are difficult to find. This, perhaps, has something to do with the vastness of what it encompasses as well as the fact that its body of knowledge is drawn from psychology, sociology and anthropology (Luthans, 2002:24), and ranges from a focus on attitudes through to leadership. Its meaning and scope are often not found in a single source but must be extracted and assimilated from different sources. It seems that definitions are more often found in textbooks rather than in academic papers. Three definitions are offered here. Firstly, according to Luthans (2002:23) "[o]rganizational behaviour can be defined as the understanding, prediction and management of the human behaviour in organizations", and secondly, according to Kinicki and Fugate (2012:5), *"OB is an interdisciplinary field dedicated to better understanding and managing people at work. By definition, organizational behaviour is both research and application oriented. Three basic levels of analysis in OB are individual, group and organizational"*. Organisational behaviour has been

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conceptualised by Brief and Weiss (2002:280) as the nature of the influence of organisations on people, and people on work organisations. This third view emphasises the interconnectedness of people, work and behaviour within a particular environment – whether this is the macro work environment or the wider meso environment in which the organisation is situated.

1.8   Integration through a meso level paradigm

A meso level paradigm is employed to integrate the macro level (represented in this study by the organisational learning) and the micro level (represented in this study by the individual learning). According to Rousseau and House (1994:15-16), many concepts cannot be understood by studying one level in isolation, and they suggest that key features of meso theory to consider include: the impact of context on individual and group behaviour; the way context is constructed by the individual; parallels and discontinuities in behaviours across the three OB levels; and the expansion of units of study to incorporate abstract organisational aspects and activities.

Within this meso level, influencers include the legal and regulatory environment as well as the changes over a period of time, similarly the turbulent economic cycle that has reflected global susceptibility. Incorporating the meso concept as a perspective creates the space and provides credence to the complexity of real-world challenges that are engaged in organisational behaviour research. Application to this study is reflected in Table 1.

Table 1:   **Application of meso concept to this research study**

Examples of disparate inputs for consideration	Levels of engagement	Examples of areas of focus
Structures, policies and culture that support: • Open communication • Flow of information • Commitment to learning • Shared vision and values	*macro* **Organisation**	Behaviours lead to a learning organisation.

• Role model leadership • Environment that supports learning • Learning opportunities • Open communication • Commitment to development • Mindfulness and responsiveness to organisational socioeconomic context	*meso* **Integration of macro and micro levels and grounded in context**	Behaviours lead to a learning environment with enhanced learning opportunities that improve organisational delivery.
• Lifelong learning attitude • Self-insight and perception • Personal flexibility and adaptability	*micro* **Individual**	Behaviours lead to lifelong learning.

1.9 Assumptions underpinning this study

A core assumption was that corporate universities are premised on organisations that aspire to become learning organisations. A further assumption was that there is a fundamental link between corporate culture, organisational behaviour and corporate universities, and that it was possible to better understand that link. An assumption existed, grounded in the success of the corporate university, that the framework it was based on contributed to its success and therefore could provide a contribution to informal theory. Finally, an assumption existed that the researcher had the expertise and insight to understand, explore and communicate the relationships that existed and could objectively reflect these formally in a final report.

1.10 Definition of key terms

Key concepts within this research study include: organisational behaviour, culture, organisational learning, learning organisation and corporate university. Definitions for these terms are provided to give clarity around the concepts themselves and to lay a conceptual foundation.

Kinicki and Fugate (2012:5) define **organisational behaviour** as "an interdisciplinary field dedicated to better understanding and managing people at

work. By definition, organisational behaviour is both research and application oriented. Three basic levels of analysis in OB are individual, group and organizational".

Schein (1990:111) defines **culture** as a pattern of basic assumptions, invented, discovered or developed by a given group as it learns to cope with its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, is to be taught to new members as the correct way to perceive, think and feel in relation to those problems.

Argyris and Schon (1978:19) describe **organisational learning** as learning conducted by individuals, but this learning becomes embedded in the organisational memory. In their view, individual learning is facilitated or inhibited by the organisational environment (Argyris & Schon, 1978). Argyris (1995:20) also explains organisational learning as the process of "detection and correction of errors".

Senge (1990:3) defines **learning organisations** as "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 to learn together".

Meister (1998:29) defines a **corporate university** as the strategic umbrella for developing and educating employees, customers and suppliers in order to meet an organisation's business strategies.

1.11 Conclusion and outline of the thesis structure

An introduction and motivation for the study was provided in this chapter as well as the context and significance of this research study. This was followed by a discussion of the problem statement, the research question and the objectives of the study. The importance and contribution of the research were outlined, the research approach and scope were summarised, and research rigour and the role of the

researcher were discussed. The research perspective was clarified along with the assumptions underpinning the study. Finally, definitions of key terms were provided.
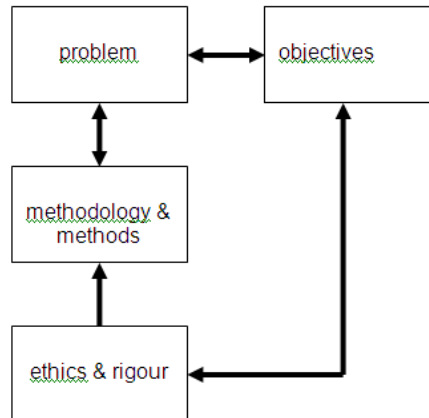
Figure 3:   Logic underpinning the thesis

The figure above gives an indication of the flow of the rationale within this thesis. The problem statement and framing, along with the research question and research objectives, provide context – both broad and specific – and give an indication of the specific direction of this research. Both problem and objectives are linked as the one flows from the other. Methodology and methods provide an understanding of the position/world view of the researcher and the intention to follow a case study approach. Underlying all these factors was the requirement to base the research study on strong ethical behaviour and considerations, as well as to ensure that rigour was practised in every aspect of the study, further indicating transparency and trustworthiness.

Outline of the thesis structure:

In **Chapter 2** the overarching philosophical approach is described and a detailed explanation of the research design is presented along with the methodological implications for data collection and data analysis. The decisions taken by the researcher with regard to the research design and methodology had an impact on the lens used when reviewing literature, and this logic underpins the structure of this dissertation, with research design preceding the presentation of the initial literature review.

Chapter 3 explores literature on organisational learning, corporate universities, organisational behaviour and a culture of learning. This initial literature review was done early on to gain an overview of the existing body of knowledge on the key concepts that were anticipated to have relevance for the research. These concepts included corporate universities, organisational culture, organisational learning and organisational behaviour.

Chapter 4 provides the foundational background to the case study that is presented in Chapters 5 to 10.

Chapters 5 to 10 comprise the core findings of the **case study** and follow the logic and reasoning of the framework which was developed as an outcome of the research. The case study chapters are divided into the themes which emerged and are structured to follow the framework:

Chapter 5: Theme 1 – Context as a catalyst
Chapter 6: Theme 2 – Leadership as a critical role player
Chapter 7: Theme 3 – Academy as a key driver of learning
Chapter 8: Theme 4 – Individual as recipient and beneficiary
Chapter 9: Theme 5 – Key stakeholders: HR, L&D officers and line managers
Chapter 10: Theme 6 – Culture as the normative domain

Each of these case study chapters is concluded with 'reflexivity points' which add insights from the researcher on the theme of the respective chapter.

Chapter 11 discusses and triangulates the findings of the case study with literature. The framework derived from the data analysis is used as a guideline for the discussion.

Chapter 12 concludes and reflects on the process and approach taken, outlines the limitations of the study, presents a number of propositions, and points to areas for future research.

Chapter 13 is written in the form of an epilogue and provides a complete member researcher introspective of the research undertaken.

2   RESEARCH DESIGN AND METHODOLOGY

2.1   Introduction to the research design and methodology

In the previous chapter the research problem was identified and situated within the context of the construction industry in Southern Africa. In this chapter the overarching theoretical approach is described and a detailed explanation of the research design is presented along with the methodological implications for data collection and data analysis. Included are extracts provided as examples of actual processes followed.

A single case study research design using a qualitative approach to data collection from a complete member researcher perspective was utilised to conduct the study. Data sources consisted of archival documents and semi-structured, in-depth interviews with senior and executive leadership and learners within the organisation. Computer-assisted qualitative data analysis software (CAQDAS) was used for data coding, disaggregating it into workable and manageable constituents. This enabled emerging concepts, categories and themes to be coded and tracked throughout the entire iterative process.

The focus of this study was the establishment of a corporate university and the role of organisational behaviour from inception through to the end of the period of study (2006-2011), with the aim of constructing emergent theory encapsulated in an organisational behaviour framework. With this in mind this chapter covers the following aspects:

- Research philosophy
- Research rationale
- Research design
- Role of the researcher as analytical autoethnographer
- Data collection and analysis
- Plan for the case narrative
- Research rigour
- Ethical considerations

2.2 Research philosophy

Philosophical beliefs shape how the qualitative researcher sees the world, and this influences research behaviour and choices made, forming a 'net' that encompasses their ontological, epistemological and methodological premises (Denzin & Lincoln, 2005:22; Shah & Corley, 2006:1823; Welman & Kruger, 1999:7; Morgan & Smircich 1980:493; Guba & Lincoln, 1994:105).

In this study, *critical realism* was the basis for the research philosophy framework (Fleetwood, 2005:1-2; Sayer, 1997:484; Bhaskar, 1998).

Interpretive paradigms can be defined as the actual basic belief system or world view that guides the researcher and results in choices of ontology, epistemology and methodology (Denzin & Lincoln, 2005:22; Gioia & Pitre, 1990:587; Morgan & Smircich 1980:499; Welman & Kruger, 1999:7). Some of the mainstream paradigms are summarised in Table 2 below.

Table 2:   Research philosophy orientation
Adapted from Saunders *et al.* (2009:119)

	Positivism	Realism	Interpretivism	Pragmatism	Critical realism
Ontology	Objective, independent	Objective, independent	Subjective, socially	Multiple views, choose best	Real, law-governed

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	of social actors	of human thoughts	constructed	representative view	world, independent of man
Epistemology	Facts and observable data	Facts and observable data but sensations also play a role	Social phenomena, situational	Integrate perspectives to interpret the data	Science is a social activity which produces knowledge

Burrell and Morgan (1979:22) suggest that there is a tendency to polarise aspects of world views. Firstly there is the subject-objective dimension which relates to the manner in which an individual interprets and describes the world – subjectively in a metaphorical way to reduce complexity to a more manageable level, or objectively in literal, hard, quantitative terms.   The other dimension is the tension between maintaining the status quo or shifting towards radical change. These dimensions are shown in Figure 4 below in a simplified version of the framework:
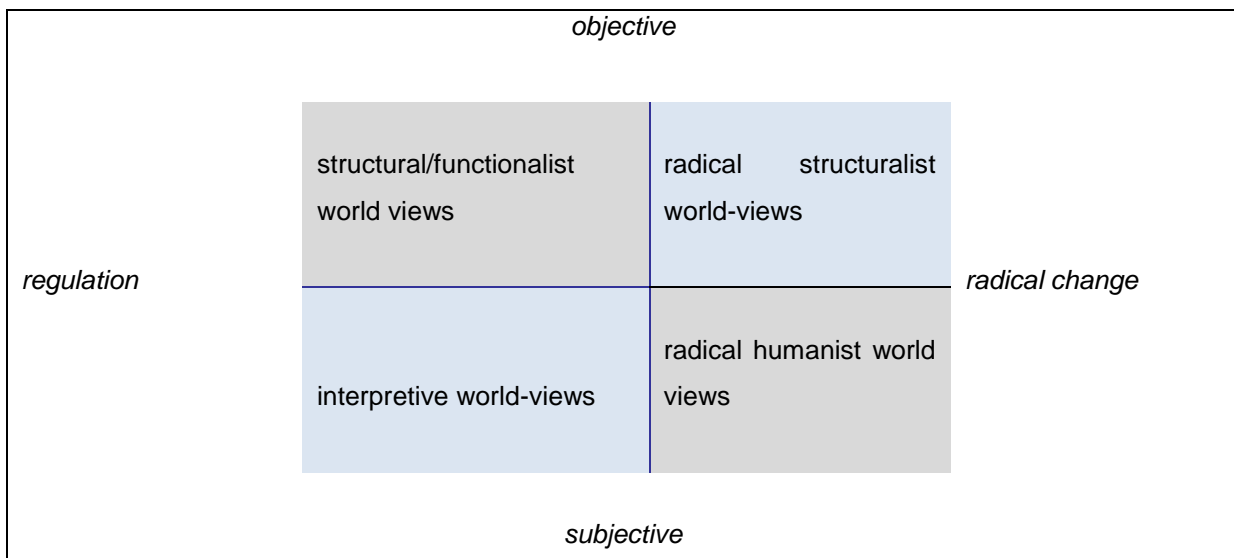
Figure 4:   World View Framework

Adapted from Burrell and Morgan (1979:22)

The intent of this study is to understand rather than to change, thus the research falls into the 'regulation' dimension. Data is collected from a variety of sources and strives where possible to take an 'objective' approach while being fully cognisant of

the challenges of reflexivity in the pervasive 'subjective' influences of the researcher's insider role (Tietze, 2012:57).

Burrell and Morgan (1979) suggest that these world views are mutually exclusive, however, Waring (1996:5-6) argues for an inclusive pluralist view. This is echoed by Gioia and Pitre's (1990:587-591) call for a more flexible multi-paradigmatic approach to account for multi-faceted phenomena. They suggest that traditional approaches to theory building in organisational studies have delivered valuable but somewhat incomplete views of organisational knowledge largely due to the dependence on one major paradigm to understand complex organisational phenomena. Alternative approaches to theory building, such as a multi-paradigm view, could offer possibilities for creating fresh insights and can thus produce uniquely informative theoretical views of events under study (Gioia & Pitre, 1990:587-591).

The perspectives presented by a multi-paradigmatic view were relevant to my world view as the researcher, however, it was the philosophy of critical realism that provided the best philosophical articulation for this study.

2.2.1   Critical realism as a research philosophy

Critical realism, a philosophy attributed to philosopher Roy Bhaskar, has gained ground in the past decade as an alternative to positivist and interpretive research (Bygstad & Munkvold, 2011:1). The philosophy of critical realism links a realist ontology with an interpretive epistemology suggesting that while a real world exists, our comprehension of it is socially constructed and fallible (Bygstad & Munkvold, 2011:1; Fleetwood, 2005:2). Bhaskar (1998:18) notes that "science is a social activity whose aim is the production of knowledge", and that it is dependent on our knowledge or perception of an independent *real* world as well as an *actual* world. Bhaskar's real world is a "law governed world independent of man" (Bhaskar, 1998:20) which triggers events that constitute actualities in an actual world (Bhaskar, 1998:24). This actual world can be observed by scientists in an empirical world who are able to have "scientifically significant experiences" but the "events are always categorically independent of these experiences" (Bhaskar, 1998:23-24).

According to Bhaskar (1998:25-26), these events are the result of behaviour or 'mechanisms', and in research our motivation is to understand and attempt to explain the underlying causality which ultimately constitutes our epistemological cognition or "production of knowledge" (Bhaskar, 1998:18). It is important to note that 'mechanisms' are often not observable, posing a problem for the researcher to observe or perceive them. Bhaskar (1998:xvii) proposes that "theoretical explanation proceeds by description of significant features, retroduction to possible causes, elimination of alternatives and identification of the generative mechanism or causal structure at work".

In the case study in this research, interviews with senior executives, human resources and training professionals are counterpoised with archival document review – and to enrich and enhance the view, individual learner perspectives are included. In addition to this, the data are analysed and interpreted by a complete member researcher resulting in what could be collectively (from the interviews and documentation) called a 'production of knowledge' based on observing from an empirical world the events occurring in the actual world as well as utilising the technique of retroduction that (Bhaskar, 1998:xvii) noted above. The emergent theory resulting from this study is reflected in the behavioural framework that summarises the findings, and is discussed in Chapter 11.

2.3   Positioning the research rationale

2.3.1   Research approach: meta theory

At the intersection between the world of work and the world of scientific studies certain assumptions are made. It is necessary to elucidate these assumptions and make transparent inherent and personally held beliefs which influence the initially proposed purpose of the research, the planning, the choices made, the rationale and the reported outcomes. A useful framework to discuss these assumptions is Mouton's Three Worlds Framework (Mouton, 2001:137) as indicated in Figure 5:

World 1: The world of everyday life

World 2: The world of science

World 3: The world of meta-science

World 1: This world comprises the world of social reality where people experience and use knowledge of different kinds – knowledge which Mouton (2001:138) refers to as lay knowledge. By way of example, in the study the questions to be answered with regard to World 1 could include the following:

- What do employees seek in a corporate university – what are their expressed needs?
- How can organisations best support learning and development in a corporate environment?

World 2: This world encompasses the pursuit of knowledge at a deeper level by making phenomena from World 1 into objects of inquiry through a systematic and rigorous process in order to generate truthful descriptions, models or theories of the world (Mouton, 2001:138).

In the study, the researcher seeks to understand the phases of development and the critical criteria and components of this particular corporate university. For example, questions to be answered at the World 2 level could include the following:

- What is a corporate university – and what does it mean in a South African context?
- What contribution can a corporate university make to an organisation?
- What are the critical behavioural factors in the establishment of a successful corporate university??

World 3: Through a process of continuous reflection, humans subject their actions to a self-critical process to determine reasons and justifications for actions (Mouton, 2001:138). In the world of meta-science this process is intensified since the fundamental requirements of science are to ensure truth and validity. This practice has led to what can be referred to as meta-disciplines, such as the philosophy and methodology of science, research ethics, and the sociology and history of science.
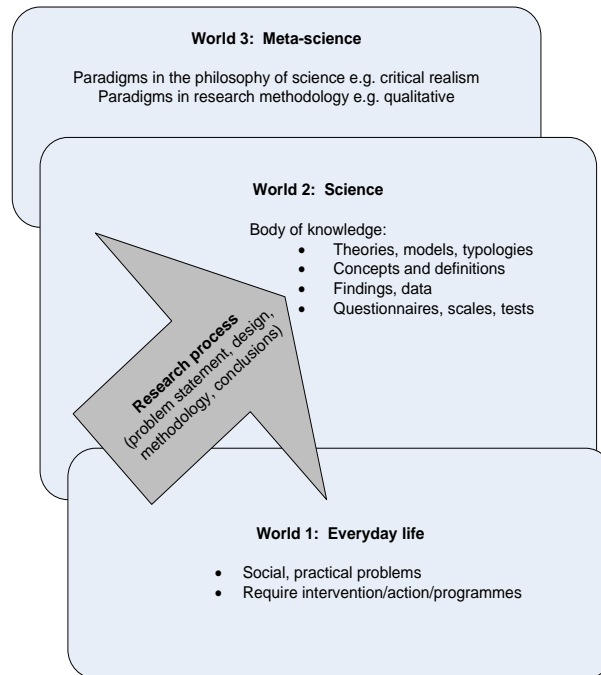
Figure 5:   The relationship between meta-science, science and everyday lay knowledge

Adapted from Mouton (2001:137)

In the study, the specific questions to be answered with regard to World 3 could include:

- What is the role of organisational behaviour in establishing a corporate university?
- Does the establishment of a corporate university influence the learning culture of an organisation?

Figure 5 above looks at the three worlds from the perspective of the research activity and takes a view on how to distinguish between research problems in World 2 and real-life problems in World 1 (Mouton, 2001:140).

2.3.2   Research from a critical realism perspective

In order to gain clarity of the actual location of the research problem itself, it is important to look beyond events and investigate the mechanisms or behaviours and the underlying structures that influence the mechanisms in order to gain insights into the mechanisms impacting on the behaviour within the organisational culture. The intention of the research was to understand the 'how' and the 'why' in the relationship between mechanisms and structures that influence learning and a

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learning culture within the organisation. In the model presented by Sayer (2003:237), indicated below in Figure 6, the area of research is indicated as *abstract research* rather than as *concrete research*.
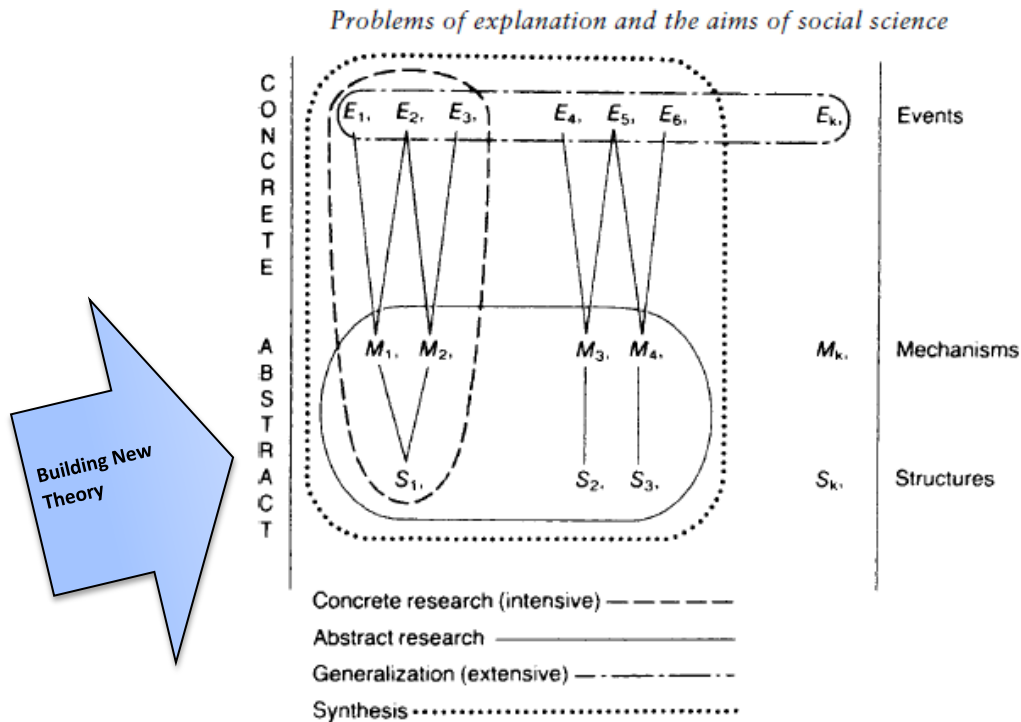
Figure 6:   Types of research
(Adapted from Sayer, 2003:237)

Framed at the intersection between the world of meta-science and abstract research, the plan for conducting the research was designed.

2.4   The research design

Research is conducted under the overarching, personally held, research philosophy of the researcher, which frames the entire research design selection and choice of methods (Creswell, 2009:3), with the intention of gaining knowledge and a deeper understanding of the research topic or problem. The research problem as discussed in Chapter 1 provided the rationale for the research design and research strategies.

2.4.1 Research design as a plan of action

A research design is the overall strategy or plan which integrates the different components of the research in a coherent manner. It provides the blueprint for the research and encompasses participant selection, data collection and how conclusions will be reached with respect to the research problem. Creswell (2009:3) proposes three types of overarching research design: qualitative, quantitative and mixed methods.

In order to select a research design, an understanding of the nature of the problem needed to be counterbalanced against the researcher's philosophical paradigm (Creswell, 2009:3). For the purposes of this research, *qualitative research*, with a case study providing descriptive and revelatory elements, was selected as findings were anticipated to be emergent and to require an in-depth historical review which would necessarily include the incorporation of contextual elements (Charmaz, 2010:134; Tsoukas, 1989:554). In addition to this, *analytic autoethnography,* (Anderson, 2006:387) as a means to understand the organisational behaviours, was needed to determine the behaviours required to establish a successful corporate university.

2.4.2 Qualitative research

Challenges exist with a definition of qualitative research since there are a plethora of perspectives, assumptions and traditions. Denzin and Lincoln (2005:3) provide a broad definition as follows:

> "Qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including field notes, interviews, conversations, photographs, recordings and memos to the self. At this level, qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them.

The research undertaken used qualitative research to study organisational behaviour in a corporate setting in order to make sense of behaviours that would influence the successful implementation of a corporate university.

Where quantitative studies focus on measurement and analysis of variables in existing theoretical constructs within a supposedly value-free framework, qualitative research focuses on the socially constructed nature of reality and the situational elements that inform the area of study (Denzin & Lincoln, 2005:10).

The aim of qualitative research is to learn about how and why people behave, think, and make meaning as they do, rather than to learn about a higher-level, macro-aggregation of behaviour (Ambert, Adler, Adler & Detzner, 1995:879; Guba & Lincoln, 1994:106), and as a result qualitative research frequently pursues 'discovery' rather than verification. The focus of this study was not on 'traditional' perspectives, hypotheses or theoretically motivated questions, but rather on meaning-seeking in a multiplicity of realities which fell within a particular context allowing the researcher to uncover relationships between elements as well as to reveal and understand complex processes and their influence on the social context (Ambert *et al.*, 1995:880; Shah & Corley, 2006:1824; Welman & Kruger, 1999:8).

In this study, qualitative explanatory research was done to build thick or rich descriptions (Strauss & Corbin, 1994:274,278) of the phenomenon of establishing a corporate learning academy. Welman and Kruger (1999:19) suggest that we can regard the purpose of qualitative research to comprise a description of how things are and why things are the way they are, in addition to being able to predict phenomena such as human behaviour in the workplace. This is echoed by Hempel (1965:113,117) who notes that the language of science has two basic functions – firstly to reflect comprehensively the objects and events under investigation and secondly to formulate theories by means of which events and objects can be explained and predicted.

Qualitative methods allow the discovery of new variables and relationships, and they elucidate complex processes and also illustrate the influence of the social context, all

of which in turn provide understanding and improvement in practice (Creswell, 2009:18; McMillan & Schumacher, 2001:397; Shah & Corley, 2006:1824; Welman & Kruger, 1999:22;).

Yin (2009:176-178) notes that when reporting case studies there are six structures, one of which is a 'theory-building' structure which supports revelatory research motivations. He further notes that these cases examine the various aspects of a causal argument. Causality is a key element of both critical realism (Bhaskar, 1998:25-26) and systems thinking (Jackson, 2000:1-2).

2.4.3 Qualitative research and theory

A fundamental of qualitative research is its propensity to *build theory*, and, according to Eisenhardt (1989:546), a strength of building theory from cases is the probability of generating 'novel theory'. According to Dubin (1978:26), "a theory seeks to make sense of the observable world by ordering the relationships among elements that constitute the theorist's focus of attention". Similarly, Strauss and Corbin (1994:278) suggest that theory consists of plausible relationships proposed among concepts and sets of concepts. Without concepts, there can be no propositions, and, as a consequence, no cumulative scientific knowledge providing a basis for these plausible but testable propositions. More formally, Welman and Kruger (1999:17) define a theory as a statement or collection of statements which specify the relationships between variables with a view to explaining human behaviour. Finally, and perhaps the most succinctly, Bacharach (1989:496) proposes that a theory is a statement of relations among concepts within a set boundary of assumptions and constraints. It is no more than a linguistic device used to organise a complex empirical world.

In seeking to understand the behaviours underlying the establishment of a corporate university in a large corporate in the construction industry in South Africa, it became clear that whilst a large body of research has been done around organisational learning and also on corporate universities, very little research has been done in the domains of organisational behaviour, organisational learning and corporate

universities collectively. This suggested that outcomes of the study would result in informal theory construction, thus influencing thinking around research design.

Boundary = Assumptions about Values, Time and Space
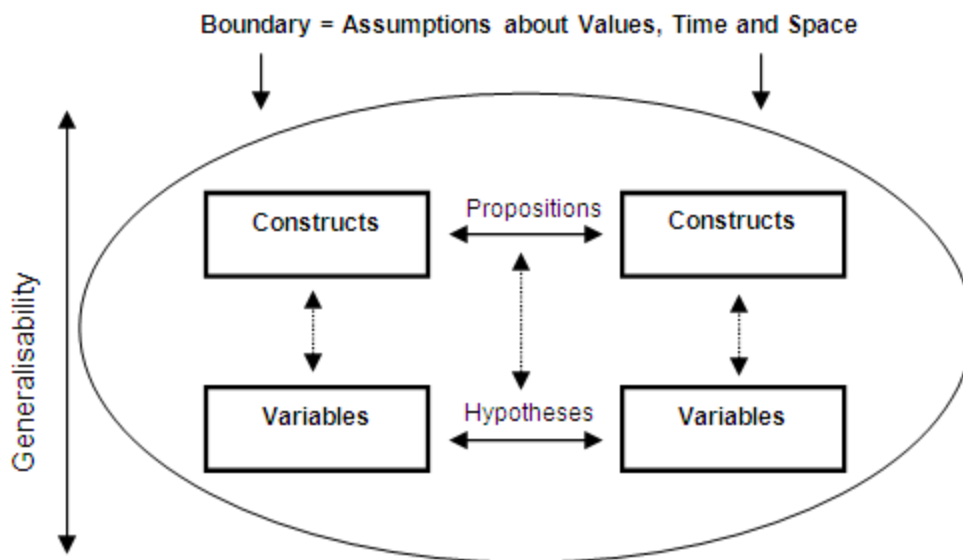
Figure 7: **Components of a theory**

Adapted from Shah and Corley (2006) and Bacharach (1989)

To understand the structures underlying patterns and events, variables must be closely examined in the light of their relationship to each other (Whetten, 1989:492; Charmaz, 2010:82). Shah and Corley (2006:1821) suggest that the link between data, patterns and theory lies in the data that describes the empirical patterns observed, and subsequently in the theory that reveals why the empirical patterns are observed or expected. This is more easily understood in a model format (see Figure 7 above). Variables are linked by arrows which depict the direction of influence, and these 'hows' or relationships are labelled to define clearly the dimensions of the relationship (Whetten, 1989:491). This process describes the pattern or discrepancy, and provides a testable proposition (see Figure 8 below).
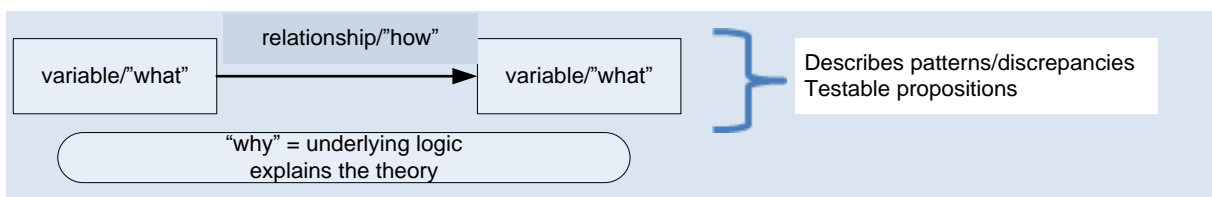
Figure 8: **Causal relationships**

The diagram below (Figure 9) encompasses the what, how and why of theory building according to Whetten (1989:490-492) but these are not sufficient for theory construction. The context must be provided for the 'who', 'where' and 'when'.
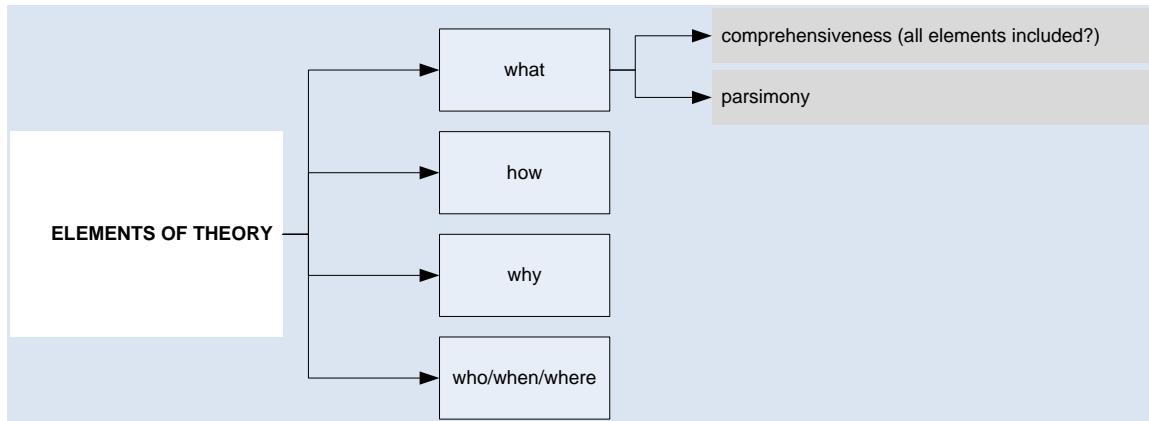
Figure 9:   Elements of theory

Adapted from Whetten (1989)

Thus, in order to reframe or reorganise thinking at higher levels of complexity, it is necessary to move from the concrete to the abstract. A critical reflection of the variables (the 'whats') and the relationships which link and pull them together (the 'hows') is concluded with the constructing of good arguments based on the underlying 'whys' (Bacharach, 1989:498; Bhaskar, 1998:12). The resultant theory is contextually bound unless it is proven to be otherwise – hence mention must be made of the boundaries of relevance (Bacharach, 1989:496; Charmaz, 2010:134; Miles & Huberman, 1984:25). The resultant theory should provide elucidation or a 'sense-making' of the problem.

The variables that emerged in this study are contained within the "Complex web of relationships" (see Figure 17, p. 99). The role of 'context' surfaced as an important driver of behaviour in the case study, which resonates with the thinking of Bacharach (1989:498).

2.4.4   Case study research method

Within the ambit of qualitative research, the case study has been selected as the key vehicle to achieve a better understanding of organisational behaviour in the

establishment of a corporate university. A definition of a case study by Welman and Kruger (1999:190) suggests that it pertains to the fact that a limited number of units of analysis (often only one), such as an individual, a group or an institution, are studied intensively. Eisenhardt (1989:534) notes that "the case study is a research strategy which focuses on understanding the dynamics present within single settings". Yin (2009:18) defines the case study as "an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context, particularly when the boundaries between the phenomenon and the context are not clearly evident". The latter definition is particularly pertinent to this study. The case study application in this research will be described later in this document.

2.4.4.1   Case study designs

Yin (2009:46-60) notes that there are different types of case study design, as depicted in Figure 10 below. More simply, there are single and multiple case designs, and then there is the possibility of embedded units of analysis. For the purposes of this study a single case design was chosen as there is a single unit of analysis. The rationale for the single case is that it is a *revelatory* case (Yin, 2009:48) since the researcher was in an advantageous position and able to study the set-up of a corporate academy within an organisation with a specific focus on organisational behaviour. The case could thus be considered revelatory as it was an opportunity to observe and analyse a phenomenon not easily or frequently accessible for social science inquiry (Yin, 2009:48).

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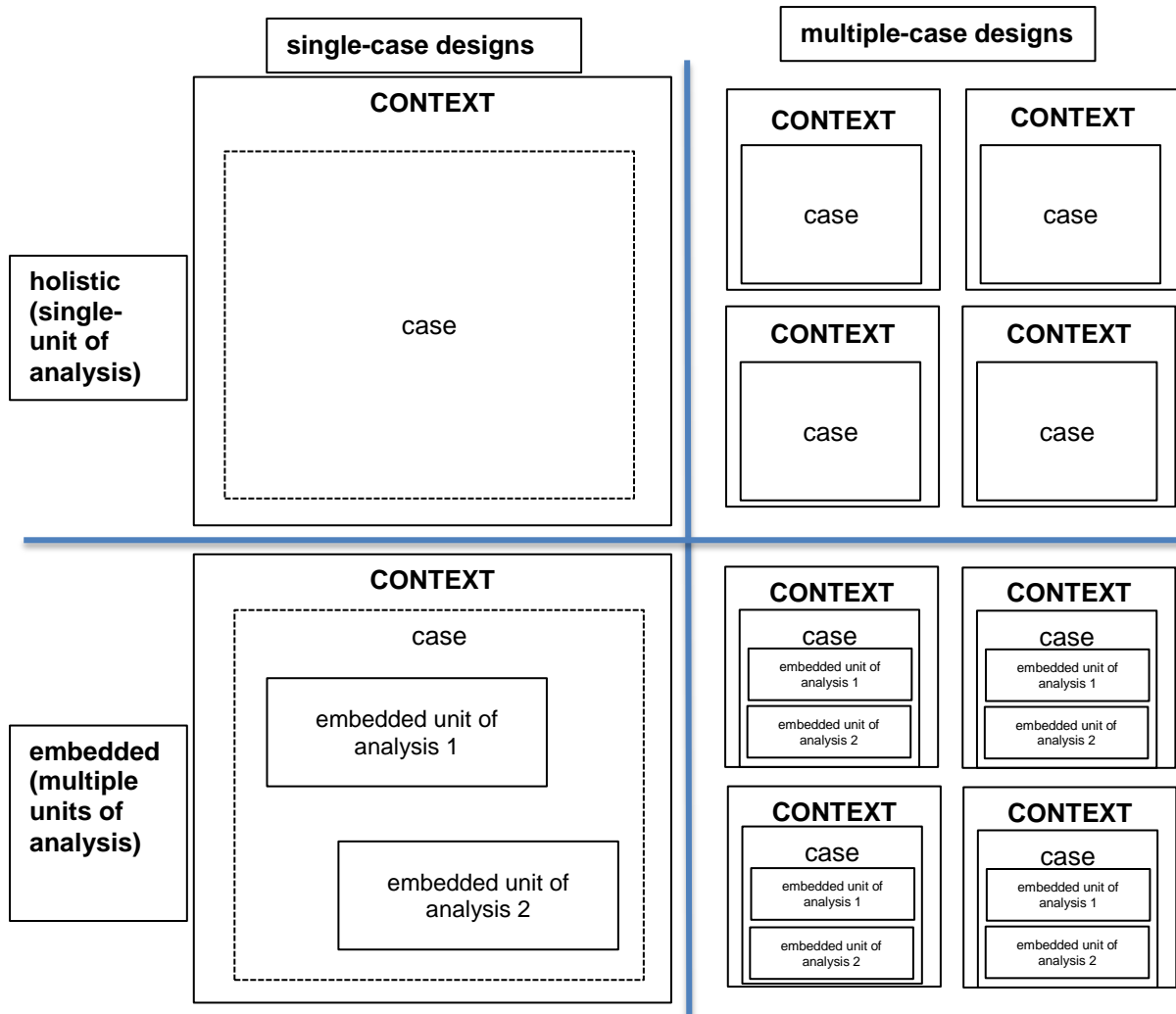
Figure 10: Basic types of design for case studies

(Adapted from Yin, 2009:46)

Yin (2009:8) notes that case studies can be used for three purposes, namely exploratory, descriptive or explanatory. Since the focus of this study is on the establishment of a corporate university over a five-year period with the aim of constructing emergent theory encapsulated in an organisational behaviour framework, the motivation was to understand 'how' and 'why' as part of an explanatory research focus to build 'thick' or rich description (Strauss & Corbin, 1994:274,278).

2.4.4.2 Case study method

The case study is a research strategy which focuses on understanding the dynamics of a particular setting and can involve single or multiple cases on numerous levels of

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analysis (Yin, 2009:46; Eisenhardt, 1989:534). Welman and Kruger (1999:191-2) highlight three aspects of case studies: study boundaries need to be clearly defined; inductive approaches should be used to elicit patterns and consistent regularities; and triangulation must be used to corroborate findings.

Case studies are particularly relevant when examining contemporary events, and they are able to incorporate direct observation of these events as well as interviews with persons involved in the events (Charmaz, 2010:25-30; Yin, 2009:11). Yin further notes that the case study's unique strength is its ability to draw from a range of evidence extending from documents, artefacts, observations and interviews (Yin, 2009:11). Whilst the researcher, as a complete member researcher or insider, was responsible for the implementation of the corporate university within the organisation, data were collected extensively through interviews with senior management, through archival evidence and through observations where these were corroborated by other sources of data (Yin, 2009:8,13).

The role of the researcher is discussed below – the explicit assumption is that theory offers an interpretive portrayal of the world – however, an exact or complete picture of it is not given (Bhaskar, 1998:34; Charmaz, 2010:19; Guba & Lincoln, 1994).

2.5 Analytic autoethnography and the researcher as insider

The research is conducted from a 'being there', 'from the inside' and 'immersion' perspective that focuses on actual practice and situational learning (Evered & Louis, 1981:386).

In this study, the researcher is part of the study as a *complete member* (designer and co-implementer of the corporate university), and as such impacts on the sphere of interaction and has an implicit world view which shapes the generation of knowledge (Charmaz, 2010:15; Tietze, 2012:54). This discussion on world views has relevance within organisations as well as for research. For individuals with differing world views there is an impact in the organisation on the culture and on

teams comprising diverse mental models, and for the researcher cognisance needs to be taken of the perspectives of those under scrutiny as well as of personally held views (Charmaz, 2010:15). Thus, an understanding of and allowance for these dynamic multiple viewpoints are required as well as of/for any influence the researcher may personally have due to positional power within the organisation (Tietze, 2012:55).

For the purposes of this study, the 'real-world' contexts of organisations and environments were assumed to be real but not that there was only one 'true' answer. This did not mean that the goal precluded one true answer or that a systematic inquiry with substantive methodological process was not followed. Organisations consist of people and are socially constructed, thus cognisance needs to be taken of behaviour and the significant influence this has on culture and learning. Whilst theoretical absolutes and 'generalisability' are important in the world of science, there is also a place for understanding in depth the single instances which can then be tested more widely (Yin, 2009:38).

The aim of the research undertaken in this study was to gain an understanding of human behaviour, deeper than just at a positivist's 'observable' level (Morgan & Smircich, 1980:496); seeking rather to understand the multiple social realities in a more context-oriented epistemology in order to achieve Bateson's 'systemic wisdom' (Guba & Lincoln, 1994:113).

2.5.1 Researcher as organisational actor

It is the researcher's responsibility to rigorously gather data and understand disparate interpretations, and to do this in a systematic and informed manner.

Interpretations of a phenomenon need to be developed that make sense to the original informants, whilst also being plausible to uninformed others. This ultimately leads to the formulation and expression of concepts into theory (Shah & Corley, 2006:1823; Welman & Kruger, 1999:193).

Qualitative research assumes that reality is a multi-layered, interactive and shared social experience, and researchers believe that individuals, groups or organisations of people derive meaning from or ascribe meaning to events, processes, objects or relationships in a socially constructed manner. They do this as a means of sense-making in alignment with perceptions and underlying belief systems (McMillan & Schumacher, 2001:396). In their unique position of observer or actor, insights are developed which are not possible through other methods of analysis (Gioia & Pitre, 1990:588; Morgan & Smircich, 1980:498; Shah & Corley, 2006:1823).

The orientations of the researcher are considered part of the process of doing qualitative research (Ambert *et al.,* 1995:879; Strauss & Corbin, 1994:274; Tietze, 2012:54) or, seen in another way, the researcher is the actual research instrument (Welman & Kruger, 1999:195) who relies on experience, expertise and intuition. McMillan and Schumacher (2001:396) suggest that disciplined subjectivity is required as a basis for the researcher's self-questioning and personal empathy with participants – this, along with reflexivity in order to rigorously examine the influence of personal beliefs and values on the study (Tietze, 2012:57).

Welman and Kruger (1999:188) agree that we cannot detach ourselves from inherent presuppositions and we cannot claim to be free from the influences of past experiences and reading (Heath & Cowley, 2004:143). Van Maanen (1979:520) expresses it a little differently: "The map cannot be considered the territory simply because the map is a reflexive product of the map maker's invention. The map maker sees himself quite as much as he sees the territory".

Interactive research depends largely on interpersonal skills, including those involved in building trust, withholding judgement, respecting norms and ethical issues, and, added to this, interactive research depends on skills in managing formal and systematic methods of data collection and analysis to ensure the rigour of the researcher's work

2.5.2 Analytic autoethnography

Understanding my role in the process of conducting the case study research was problematic in that my role was not truly that of a participant observer, nor was it that of an outsider. The insider status was closer to my real position, but it is the concepts under the banner of analytic autoethnography as described by Anderson (2006:375) that were most closely aligned with my role as researcher.

Anderson (2006:378-390) provides an overview of analytic autoethnography by noting that there are five key features:

- Complete member researcher status
- Analytic reflexivity
- Narrative visibility of the researcher's self
- Dialogue with informants
- Commitment to theoretical analysis

A concise discussion of these features follows below.

2.5.3 Complete member researcher (CMR)

In this classification of CMR, the autoethnographic researcher is a complete member of the social world under study. There is a need to manage both the role required as part of a social situation as well as that of a researcher. In my case it was the role of Head of Academy as well as the role of a researcher collecting data for a doctoral research. Anderson (2006:382) states that the autoethnographer is frequently more analytic and self-conscious than the typical group member.

2.5.4 Analytic reflexivity

The self-consciousness of the autoethnographer indicates the link to the research situation and the effect of the researcher on it. This self-conscious introspection stems from a need to better understand the social situation leading to a heightened awareness of the interplay of events and dialogue. During the collection of data –

both in the interviews and the document review – there was the tension of letting the data speak for itself and of pre-empting the interpretation

2.5.5 Narrative visibility of the researcher's self

Anderson (2006:384-5) notes that in autoethnography the researcher is a highly visible social actor within the text and needs to fully acknowledge and use subjective experience as an integral part of research, but must avoid self-absorbed digression. In this research report the researcher is 'written into' the text most notably in the 'Reflexivity points' at the end of each case study chapter as well as in the final chapter of the dissertation.

2.5.6 Dialogue with informants

Analytic autoethnography needs to be grounded in the social environment through the experiences of the researcher as well as through engagement and dialogue with others in order to facilitate multiple perspectives when engaging in addressing and making sense of complex social issues. The data collected for the case study research included a number of interviews with a cross-section of people relevant to the study.

2.5.7 Commitment to theoretical analysis

According to Anderson (2006:387), a defining hallmark of analytic social sciences is the use of empirical data to give clarity to a broader set of social phenomena at levels of abstraction above the raw data. The intention is to refine theoretical understanding of social processes. In this sense the purpose of this study is to use the data to understand the role of organisational behaviour in the social setting of Group Five and to understand the way organisational behaviour has influenced the establishment of the Academy.

Thus, this research design combines both the case research methodology with analytic auto-ethnographic observation as a means to better understand the field of

organisational behaviour as it pertains to my engagement in setting up a corporate university based on data gathered from key role players as well as from archival documents. My role as complete member researcher facilitated the gathering of data due to relatively easy access as well as the insider insights of where the richest sources of data could be found.

2.6 Data collection and analysis

Data collection and data analysis require advance preparation (Yin, 2009:67) and the crafting of a solid plan. This includes a comprehensive view of the what, where, when, how and why of the research effort. Transparency in terms of planning and execution at all stages increases the rigour and reliability of the study (Yin, 2009:79). Using the guidelines provided by Yin (2009: 79-90), the researcher prepared a case study protocol as described in the section below.

2.6.1 Case protocol

A case protocol contains the procedures and general rules to be followed that are determined at the planning phase (Yin, 2009:81). As this research was conducted by a single researcher, the protocol suggested by Yin was tailored to meet the needs of the study. The scope of the protocol for this study was guided by Yin (2009:81), and included:

- An overview of the intended research – in the form of a PowerPoint presentation
- Field procedures – including letters of informed consent, and interview questionnaires
- Case study questions – which were kept visible as prompts to contain research within boundaries stipulated
- Case study report guidelines – a plan for the reporting output of the case study as well as databases for keeping track of sources of data

These four protocol aspects are discussed in more detail below.

2.6.1.1   Introduction to the research in the workplace

An overview of the research was compiled in the form of a PowerPoint presentation and used for the purposes of focusing on the salient aspects of the study (see Appendix D). This was useful when communicating with Academy team members and, in summarised form, with other stakeholders, such as the Learning and Development Forum and organisational executives.   The presentation included aspects such as:

- Logic underpinning the study
- Context
- Background to the study
- Problem statement
- Research questions
- Anticipated research outcome (summarised)
- Objectives of the study
- Scope of the study
- Assumptions
- Contribution of the study
- Underlying literature
- Research design
- Methods
- Case study challenges
- Research ethics
- Research rigour
- Project plan

Whilst not many opportunities arose to use the entire presentation, disparate elements were used on different occasions, for example, the project plan was shown to the researcher's manager as a measure of progress made. However, the entire presentation was shown to the Academy team in order to inform them of the research process.

2.6.1.2 Sources of data

Group Five is an integrated construction services, materials and infrastructure investment group that operates in over 20 countries with more than 10 000 employees. The Group structure comprises four clusters: Investments and Concessions, Manufacturing, Construction, and Engineering and Construction. These clusters target seven sectors, including mining, industrial, power, oil and gas, water and environment, real estate, and transport. The company has over 14 business units but derives the majority of its turnover from construction activities. Out of these business units, the **three** construction business units were selected for the basis of this research.

In order to answer the key research question it was necessary to identify the most relevant sources of information and then identify the mechanisms to capture these sources of information as evidence. Data was collected through two main avenues, these being documentation/archival records and interviews. Data collection and analysis are discussed below under **Interviews** (2.6.2) and **Documents and archival records** (2.6.3).

2.6.2 Interviews

2.6.2.1 Interview procedures

Yin (2009:106) notes that interviews are important sources of case study information and that in-depth interview questions relating to both facts and opinions can be asked of the interviewee who can be considered more of an informant than a respondent (Yin, 2009:107). In a review of *procedures* for the interviews, the following steps were adhered to:

i. Gaining access to the case study company: a letter of permission was signed by a senior executive.
ii. Prospective interviewees were emailed requesting participation in interviews.
iii. An outline of the possible questions was attached to the Outlook calendar booking once interviewees had agreed to the interview appointment.

iv.   Informed consent letters were signed at the beginning of the interview and later scanned, and the original copies were filed.

v.   A brief verbal overview of the study was given to the interviewee at the beginning of the interview.

vi.   Interviews were recorded with a voice recorder (checked for battery life and disk space before each interview).

vii.   Voice recording backups were made and stored on an external drive.

viii.   Voice recordings were sent for transcriptions which were then reviewed for accuracy.

ix.   Progress with interviews and review of archival records and documentation were mapped using *iThoughts* (a software application providing a visual mapping interface).

2.6.2.2   Interviewees and interview questions

Due to the different levels and types of *interviewees* (Yin, 2009:87), the questions in the interview guidelines were modified slightly. Categories of interviewees included: executive committee members being the most senior leadership in the organisation, managing directors, HR, learning and development personnel and finally a selection of learners and their managers (see Table 3 below). Guideline interview question examples are indicated below (Table 4: Outline of interview questions), with the full list included in Appendix B.

Table 3:   **Interview types, category of interviewee, duration of and rationale for interview**

Data collection tool	Who	Why	Duration and sample size
Interviews: semi-structured, in-depth	Executive committee of Group Five including CEO and CFO	To gain insight into management thinking for the introduction of an Academy, and feedback on past, current and future of learning in the organisation	one hour five people
Interviews: semi-structured, in-depth	Managing and contract directors of construction business units	To gain an understanding of views on linkage of learning to strategy, and levels of support for learning in the business unit	one hour four people
Interviews: semi-structured, in-depth	HR Operations Director and HR directors of construction business units	To gain insight into scope of roles and perspectives on the implementation of learning in the business units	one hour five people

Interviews (video): structured	Learners in construction business units	To understand perspectives of individuals regarding benefits of learning and support received	10-15 minutes 16 people
Interviews (video) : structured	Line managers in construction business units	To gain an understanding of contribution and return on investment of learning undertaken by subordinates	10-15 minutes 17 people
Interviews: semi-structured, in-depth	Academy Programme Manager and Group Skills Development Manager	To gain an 'insider' perspective on Academy developments	one hour two people
Focus group: semi-structured, in-depth	Learning and development officers from construction business units	To gain an understanding of the role and engagement levels of L&D officers in the business units	two hours three people

The relationship between the interviewer and interviewees in the interviews conducted was in all instances informal as there was a pre-existing business relationship. Interviews were therefore commenced without lengthy introductions.

Interviews were conducted as follows:

- Executive Committee (exco] member responsible for particular business unit (BU) Managing Director responsible for respective BU
- HR Director/Manager responsible for respective BU
- L&D officer responsible for respective BU (in an L&D focus group)
- Selected learners (short video interviews)
- Selected learner line managers (short video interviews)

In addition to this, the CEO, CFO and two other company executives were interviewed along with two long-serving Academy team managers. Learners and managers were selected randomly as they had just completed a junior management programme and a 'movie' was being made to provide feedback at their programme graduation. Interviews generally spanned 60 minutes, with some lasting up to 90 minutes, and transcripts were completed for all interviews except for the short video interviews.

Table 4:   **Outline of interview questions**

Understanding the context and initial concept for the CU:
When the concept of the Academy was first formed – what was the underlying rationale and motivation? How did the sector and economy at the time influence this decision?

Establishing expectations:
In the first year – did the Academy meet expectations? What were the organisational needs that were established at the outset – and were these met?
Did the concept of the Academy evolve over the following two to three years? How? Were there any notable successes or disappointments?

Establishing critical success factors:
What do you think are the factors that influenced the success of the Academy in the early years – are these factors still the same? What role do you think leadership played/plays? What role do you think culture played/plays? Do you think the Academy has influenced the organisation's culture?
If you were to wind the clock back would you make any changes in how the Academy was set up and unfolded?

Contribution to organisational strategy:
What role do you think the Academy plays in contributing to the overall strategy of Group Five?

Measuring success and identifying behavioural elements through a comparison:
Do you think the impact of the Academy is greater in some business units than in others? If yes – could you indicate why you think this is the case? What aspects of leadership/culture/ etc. are of particular significance? What changes could be made to increase the engagement of senior leadership?

Focus on the future:
What role do you think the Academy should play in the future? Focus areas? Where are the current gaps? What are the gaps anticipated to be in the future?

From these informed and influential people it was anticipated that the questions would be answered comprehensively and provide rich data which would contribute towards the case study research. A sample of the *open-ended questions* asked of the Group Five executive committee is included in Table 4 above.

2.6.2.3   Data analysis of interviews: open coding, axial coding and core categories

Research interviews were transcribed (excluding the short video interviews) from voice recordings, and as interview transcripts became available, they were checked for accuracy and then the textual analysis commenced.

Data collection was undertaken with the intention of building theory through a grounded-theory, inductive approach (Charmaz, 2010:4,16; Eisenhardt & Graebner,

2007:30; Guba & Lincoln, 1994:110; Strauss & Corbin, 1994:273).   As data was gathered it was screened via a lens of limited codes (Evered & Louis, 1981:390). The processes were iterative, cyclical and evolutionary rather than linear (Ambert *et al.*, 1995:884; Crescentini & Mainardi, 2009:432; Heath & Cowley, 2004:144). As the body of data grew, patterns emerged from the coding, clustering and categorisation, and eventually a point of saturation was reached (Eisenhardt, 1989:545; Evered & Louis, 1981:390; Gibbs, 2011:44; McMillan & Schumacher, 2001:37; Strauss & Corbin, 1994:274-5; Welman & Kruger, 1999:213).   The actual steps taken are described below:

i. Utilising a CAQDAS (computer-assisted qualitative data analysis software) tool called Nvivo®, a number of 'nodes' (open coding) were identified from the interview transcriptions in a data-driven coding process (Gibbs, 2011:45). Questions asked by the researcher while determining nodes included, "What is this about?"

ii. With each interview an iterative process took place with a view to expanding the volume of data in order to enhance the density and complexity rather than reduce and summarise the data (Gibbs, 2011:3-4). This cyclical process was followed until saturation was achieved resulting in 110 nodes.

iii. Once all the transcripts had been coded, the list of nodes was exported into Excel. A clustering process took place to determine if relationships (axial coding) existed between the clustered codes. In the clustering process, the question asked by the researcher was, "How does this node relate to that one, and how?" Where the clusters comprised more than six nodes, they were further examined to split them into separate clusters. In addition, a sense-making process was followed by tracing the path back to the actual transcripts in Nvivo® to verify the correct interpretation.

iv. These clusters were then examined to identify core categories. These core categories were then compared to the core categories which emerged from the document and archival record analysis which followed a similar process (as described in the section below) and was done manually in Excel. This combined output provided the basis for the overall study findings.

v. These categories were put onto a flip chart page (see Figure 11: Data sense-making process – core categories), and with two trigger questions driving the

sorting and sense-making of the core categories, an integrated framework was compiled (see Figure 17: Complex web of relationships p. 99). The two simple trigger questions were: a. "What drives learning in my organisation?" and b. "What behaviour is involved in this process?"
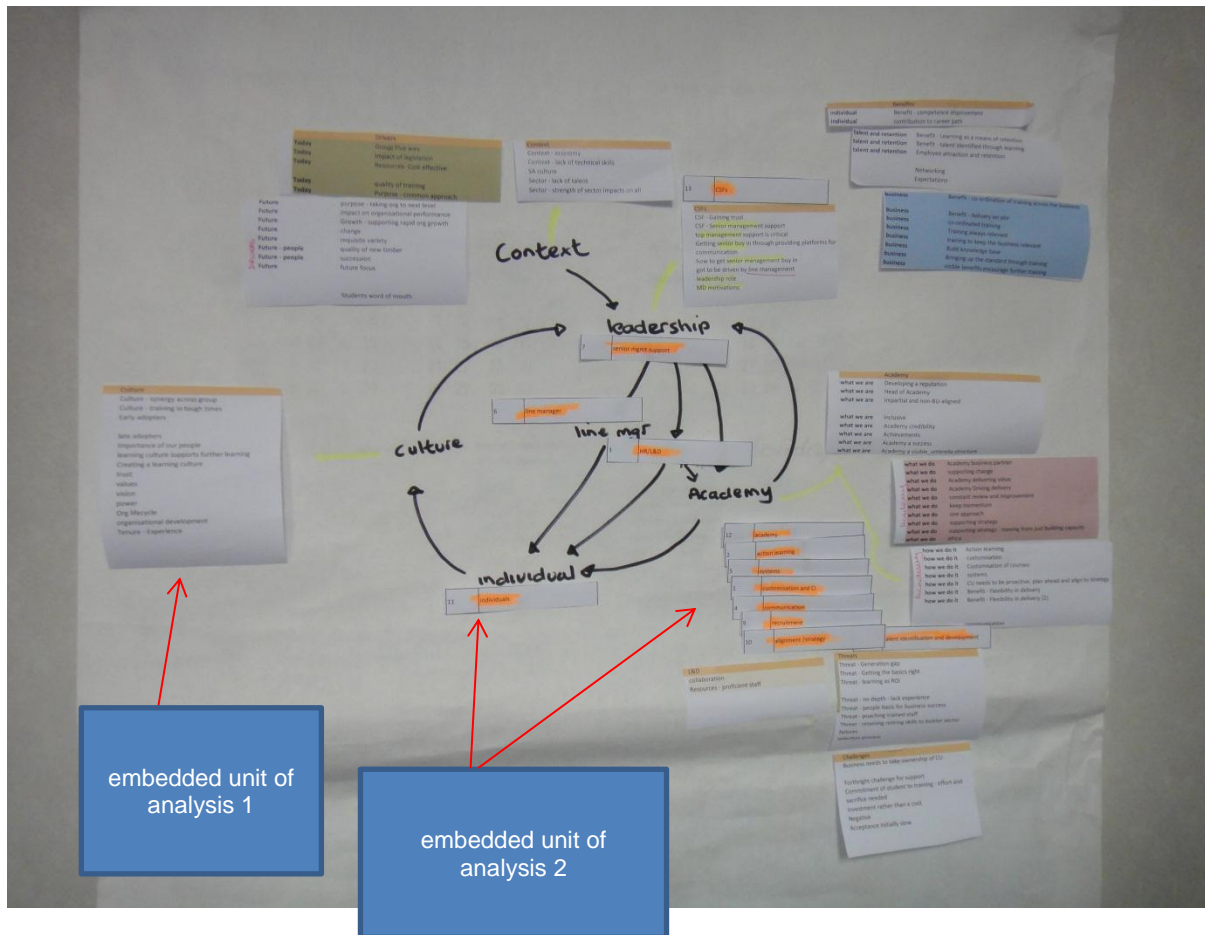
Figure 11:   Data sense-making process – core categories

The resulting framework ("Complex web of relationships") was scrutinised carefully and reflected on, based on interview and archival document data in a 'take a step back' perspective. As this process was followed, first two levels, and then, more logically, three levels emerged, these being behaviour at the individual, group and organisational levels (see Figure 18: OB levels in web of relationships on p. 101).

An example of the outputs are displayed in Table 5 below indicating the open coding based on the interview transcripts, the axial coding which was done in Excel to

gather codes into clusters, and then the core categories which were determined through an iterative process of getting close to the data to make sense of it. (Further examples are provided in Appendix C.)

Table 5:   Extract of coding: from open coding through to core categories

Open coding in Nvivo®	Axial coding done in Excel	Core category
Developing a reputation	What we are: - the right team	**Academy** has a key role in driving learning in the organisation
Academy credibility		
Academy success		
Visible umbrella structure for learning		
Business partner for people development	What we do: - winning stakeholder support	
Supporting change		
Keeping momentum of people development		
Support strategy		
Action learning	How we do it: - effective approaches to ensure sustainability - effective systems	
Customisation of programmes		
Proactive, planning ahead		
Flexibility in delivery		
Inclusive – people at all levels		

The core category identified in the table above is reflected in the framework developed which can be seen in Figure 17: Complex web of relationships (p. 99).

2.6.3   Documents and archival records

2.6.3.1   Documents and archival records: procedures for data collection

Various archival documents were studied and a number of memos (Charmaz, 2010:84) or 'notes' were taken using an Excel spread sheet format to track sources. Each one of these memos was given a label. These labels were clustered (open coding), and then through an iterative process (axial coding) higher-level clusters were formed and finally core categories were determined. This cyclical process was continued until saturation was achieved.

In a review of procedures for the gathering of data from the document and archival records, and subsequent analysis of the data, the following steps were adhered to:

i. Gaining access to the case study company: a letter of permission was signed by a senior executive.

ii. Documents sourced were either publicly available (e.g. annual reports) or located on the central corporate 'shared drive'.

iii. Each document was reviewed based on two key questions and two sub-questions:

   a. What drives learning in my organisation?

   b. What behaviour is involved in this process?

      i. What do we do as an Academy?

      ii. How do we do it?

iv. Using these trigger questions, extracts from documents were taken verbatim and inserted into an Excel spread sheet. Each of these extracts was given a 'title' or code and where applicable additional memos were written (Charmaz, 2010:84) (see example in Table 6 below).

v. Each extract was referenced to ensure a chain of evidence.

vi. Labels from the open coding process were clustered to determine high-level clusters (axial coding).

vii. These higher-level axial codes were reviewed to identify core categories.

viii. These core categories were then compared to the core categories which emerged from the interview analysis. This combined output provided the basis for the overall study findings.

ix. As noted in the section on 'Interviews' above, these combined core categories were put onto a flip chart page (see Figure 11: Data sense-making process – core categories) and with the two trigger questions mentioned in iii) above driving the sorting and sense-making of the core categories, an integrated framework was compiled (see Figure 17: Complex web of relationships p. 99).

Table 6:   **Example of open coding from documents and archival records**

Open coding code/label	action learning – real-world issues
Extract from document	*"The class of students due to complete the programme in August 2007 are engaged in action learning projects focusing on current business needs and these projects will deliver a measurable and distinct return back into the business. This real-time learning engages learners in a way that theoretical learning is unable to do – and there is the immediate*

	and continued enhancement of skills, knowledge and experience."
Memo written by researcher	Where possible programmes are based on action-learning principles, an approach which is first and foremost work based and is allied to learning from work experiences. This ensures that new learning is tested and thus has a better chance of 'sticking'. Managers are more sympathetic to time out of the workplace if the benefits are immediately visible.
Source document title and date	Academy Report Jul-07
Document reference	Board Report FY 06/07

2.6.3.2   Documentation and archival records that were sourced

Data was gathered from documentation and from archival records.   The main sources selected to gain the relevant evidence are listed in Table 7.

Table 7:   Main documentation and archival record data sources

*Name of document/s	Period	Frequency
Annual Reports	2003 to 2010	Annual
Academy Operations Meeting Minutes	2007-2011	Weekly
Academy Steering Committee Meeting Minutes	2006-2011	Bi-monthly
L&D Forum Meeting Minutes	2007-2011	Monthly
Academy Newsletters	2007-2011	Monthly
Academy contribution to Board Report	2008-2011	Monthly

* See Appendix A: Supplementary documentation

2.6.3.3   Multiple sources of evidence

The approach taken in this research was to ensure that multiple sources of evidence were pursued and, where data converged in a triangulating fashion, to use this as a trigger to examine the information more closely (Barbour, 2001:1117; Eisenhardt, 1989:541; Yin, 2009:2). Table 8 below indicates the strengths and weaknesses of the various sources of evidence.

Table 8:   Sources of evidence: strengths and weaknesses

Adapted from Yin (2009:102) and Anderson (2006:378)

Source of evidence	Strengths	Weaknesses
Documentation	- Stable – can be reviewed repeatedly - Unobtrusive – not created as a result of the case study - Exact – contains exact names, references and details of an event - Broad coverage – long span of time, many events, and many settings	- Retrievability – can be difficult to find - Biased selectivity, if collection is incomplete - Reporting bias – reflects (unknown) bias of author - Access – may be deliberately withheld
Archival records	- As above - Precise and usually quantitative	- As above - Accessibility due to privacy reasons
Interviews	- Targeted – focuses directly on case study topics - Insightful – provides perceived causal inferences and explanations	- Bias due to poorly articulated questions - Response bias - Inaccuracies due to poor recall - Reflexivity – interviewee gives what the interviewer wants to hear
Direct observations	- Reality – covers events in real time - Contextual – covers context of the "case"	- Time consuming - Selectivity – broad coverage difficult without a team of observers - Reflexivity – event may proceed differently because of being observed - Cost – hours needed by human observers
Participant observation	- Reality – covers events in real time - Contextual – covers context of the "case" - Insightful into interpersonal behaviour and motives	- As above - Bias due to participant-observer's manipulation of events
Complete member researcher	- Reality – covers events in real time - Contextual – covers context of the	- Finding a balance between job role and researcher role (avoiding a schizophrenic, frenzied, multiple

'case' - Is a full member in the social setting - Is a visible member in published texts - Practises analytic reflexivity - Takes part in dialogues with informants - Has access to the right choice of data	focus) - Role conflict - Danger of self-absorbed digression

The core categories and sub-categories that were an output from the data analysis are listed in Table 9 below.

Table 9:   Core categories and sub-categories as an outcome of data analysis

Core category	Sub-category	Organisational level
Context as a catalyst		
Leadership as a critical role player in creating and sustaining a learning organisation	Strategy and goals Competent and skilled employees Organisational success	Organisational

Academy has a key role in driving learning in the organisation	The right team
	  • Winning stakeholder support
	  • Effective approaches to ensure sustainability
	  • Effective systems
	  • Effective communication
	Delivery in line with organisational strategy
		Group

Individual as recipient and beneficiary		Individual
Key stakeholders and role players in the implementation of learning	HR Line manager Learning and development officers	Group
Culture as the normative domain		Organisational

These categories and sub-categories formed the basis for the framework which integrates the themes of the case study as summarised in Figure 17: Complex web of relationships (p. 99).

2.6.4 Some general principles of data collection and analysis in qualitative research

Some general principles of data collection and analysis were followed as part of this study. These are discussed in the sections that follow below.

2.6.4.1 Overlap of data analysis and data collection

According to Eisenhardt (1989:538), a hallmark of research to build theory from case studies is the frequent overlap of data analysis with collection, which provides flexibility in the collection process. To clarify this further, Eisenhardt (1989:538) states that analysis begins during data collection with the utilisation of coding to discern patterns so that categorisation can take place. Miles and Huberman (1984:23) display this process as a flow diagram as indicated in Figure 12 below:
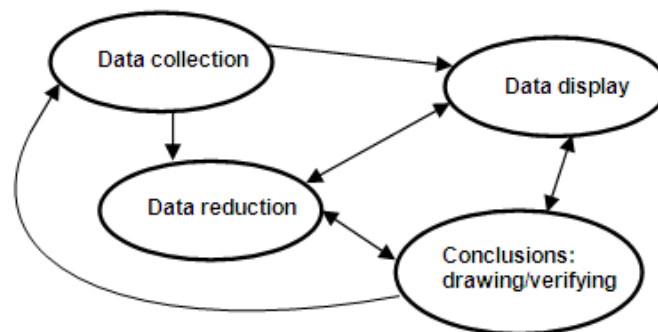
Figure 12:   Components of data analysis: flow model

In the research done, the iterative process raised the importance of the overlap of data analysis and data collection to ensure that data saturation as well as rigour was achieved.

Display of data is achieved through organising information in a manner which facilitates understanding and moves toward analysis. Miles and Huberman (1984:24) note that experience led them to be convinced that effective displays are

more efficient than longwinded narrative text and result in more valid qualitative analysis. In the diagram (Figure 13) below, Miles and Huberman (1984:24) indicate the concurrent cycles in the analysis process and the way data displays play an integral part. Displays were used extensively in the data analysis phase of this study to make sense of the data.
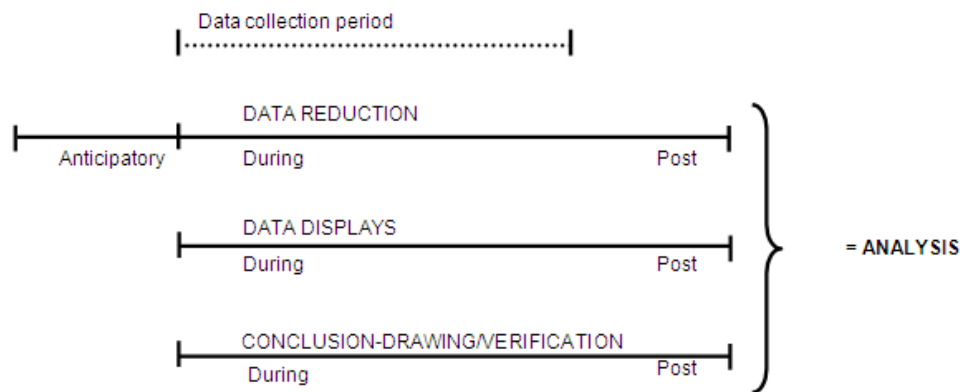
Figure 13:   Components of data analysis: interactive model

Given the volume of interview data available in transcriptions, the use of a CAQDAS tool provided a flexible and searchable resource which greatly facilitated data manipulation and data analysis through user-friendly displays.

2.6.4.3   Rich descriptions

Rich descriptions representing context as well as many layers of diverse realities, are an important grounded theory device (Ambert *et al.,* 1995:885; Shah & Corley, 2006:1822). The resultant theory is conceptually dense with many relationships embedded in a context of thick descriptive writing (Strauss & Corbin, 1994:274,278).

The case study reflects some of the rich conversations and data collected. In the narrative of the case study, both archival documentation and interview data are triangulated to corroborate and support each other in order to reflect a more holistic understanding which gives a richer dimension to concepts in the study.

2.6.5 Critical realism as an integrative framework for data collection and analysis

The concept of emergence is very relevant to a critical realist view of the causal interplay of mechanisms. A framework (Bygstad & Munkvold, 2011:5) used for data analysis contains steps against which this research data collection and analysis process was mapped as indicated in Table 10 below.

Table 10:   Framework for critical realist data analysis

Adapted from Bygstad & Munkvold (2011:5)

Framework steps	Application to this research
Description of events	The initial problem formulation as described in Chapter 1 indicates an overview of the events.
Identification of key components	Key components were identified through an initial literature review as well as through the key points identified in the description of events and these were isolated as being: corporate university, corporate culture, corporate learning, and organisational behaviour. This was confirmed in the interviews that took place, and the examination of documents. Clustering and the emergence of core categories expanded the initial components identified.
Theoretical re-description (abduction)	The case study write-up utilised a behavioural framework (see Figure 17 on p. 99) as a way of re-describing, making sense of and summarising the data collected through thick descriptions.
Retroduction: identification of candidate mechanisms	The relationships existing between the key components became an important aspect of the data analysis along with identifying the interplay in the causal relationships. These micro-mechanisms were examined, and the organisational behaviour mechanisms identified at the macro mechanism levels were overlaid (see Figure 18 on p. 101)
Analysis of selected mechanisms and outcomes	The initial framework of behaviours did not take cognisance of the role of L&D, HR and line managers. It was through an iterative process of analysis of the mechanisms and outcomes within the context of the study that attention came to be drawn to the influence of these additional components.
Validation of explanatory power	Given that the research is conducted in an open system and thus absolute answers are not possible, a process of validating the emergent elements and relationships was done within the confines of the data collection scope to the point of data saturation – resulting

in thick descriptions which aided the explanatory process and contributed to the body of empirical evidence.

One of the key focus areas in the critical realist framework above is *retroduction*, which is described by Sayer (2003:107) as being "a mode of inference in which events are explained by postulating (and identifying) mechanisms which are capable of producing them". It is the identification of the mechanisms and an understanding of the interplay or relationships between these mechanisms which contribute to the 'revelatory' outcomes of the study.

2.7   Plan for case narrative

2.7.1   Case study questions

Yin (2009:86) suggests that researchers ensure that they are constantly reminded of the specific questions underlying the study to ensure that the researcher is "kept on track as data collection proceeds". To this end, the key research question for this study was written up on a Post-It and this was attached to my computer screen for the entire duration of the research. This meant that scope creep was kept in check, and, while doing research and reviewing literature, a focus was maintained on the salient elements of the research.

2.7.2   Compiling the case study write-up

Guidance in literature with respect to presenting a case study was somewhat lacking, with a few exceptions, notably Yin (2009:121-122). Yin advises that certain types of narrative can be considered a formal part of the database but not necessarily part of the final case study report. He further recommends the practice of integrating all of the available evidence as this is actually an analytic aid to case study research.

In this case research, the researcher chose to include a much abbreviated case study narrative into the main body of the document to aid sense-making around the resulting framework. The narrative of the case, therefore, follows the separate

elements or themes of the framework (see Figure 17: Complex web of relationships) which is a reflection of the core categories which emerged from the data analysis phase. The case study write-up connects the pertinent issues through citations to the particular evidence. For example, extracts from documents (as listed in Table 7: Main documentation and archival record data sources) are inserted into the case study narrative indicated below.

Example of an extract from archival and document records data:

> At a group level the orientation programme highlights Group Five's vision and values to new employees and provides a firm foundation to understanding the Group Five Way.
>
> [Board Report FY 06/07]

This verbatim extract, with the document reference, is isolated to highlight that it is a direct quotation from the original document text. This extract is provided as evidence to support a particular aspect of the case study narrative.

Interview extracts are similarly quoted verbatim but are indicated with a different format and font. An example is indicated below (verbatim extract indicated in italics):

> In summary – as noted by an HR director in an interview:
>
> - leadership behaviour
>
> *You can have the best facilities, you can have the best course material, you can have all the easy stuff, but unless you have got leadership commitment, leadership displaying its interest and leadership committed, the Academy will never work.*

The plan for the case study narrative was supported through the use of a software tool (*Rationale®*) which allowed for the visual structuring of the case study logic and argument. This plan was discussed with the researcher's supervisors as indicated in Figure 14, before the case study narrative was written up.

Figure 14: Demonstration of the mapping tool (*Rationale*®) outputs

2.8 Research rigour

Qualitative methods by their very nature raise questions and provide data that quantitative methods cannot – largely due to the fact that they allow for the emergence of the unexpected (Ambert *et al.,* 1995:883). A necessary feature of theory building is the on-going comparison of the emergent concepts or informal theory to literature (Charmaz, 2010:82). A questioning process includes questions on what this is similar to, what it contradicts, and why (Eisenhardt, 1989:545). A broad range of literature needs to be consulted concurrently with the theory-building processes, and assurance of research rigour in the form of trustworthiness must be evident in qualitative research.

As noted earlier in this chapter, the anticipated outcome of the research was to build theory in an area that currently has very little documented research. Eisenhardt (1989:546) notes that a strength of theory building from cases is the propensity to generate novel theory. She further states that the notion of the process being limited by researcher preconceptions is a myth and that rather the "constant juxtaposition of conflicting realities tends to 'unfreeze' thinking" and results in generating theory with less bias than "armchair, axiomatic deduction". An additional strength is that the

emergent theory is more likely to be able to be measured due to the proximity to the data and events, and thus has already been measured during the theory-building process (Eisenhardt, 1989:547).

Some elements for careful management to ensure case study weaknesses do not impact on the integrity of the case include:

- the lack of parsimony (Eisenhardt, 1989:547) which in turn influences the researcher's ability to focus on the important relationships
- narrow and idiosyncratic theory that lacks a broader sweep of relevance (Eisenhardt, 1989:547)
- non-generalisability of findings beyond the case researched (Tsoukas, 1989:555-556)

2.8.1   Reliability and generalisability

Qualitative studies, where they are well-grounded, are a source of rich descriptions, depictions of processes in local context, and fruitful explanations – they do not fundamentally focus on replicability or absolute answers. In a world amok with Churchman's "wicked problems" (Miles & Huberman, 1984:22), qualitative researchers cannot unequivocally claim a single conclusion or explanation. However, according to Gibbs (2011:151), reliability of the study is the degree of replicability by another researcher presented with the same circumstances and data. Gibbs (2011:151) does note that this is a contentious issue, and indeed, given the linkages to time frames and the contextual challenges at a specific point in time for this case, this would prove a complex endeavour for the 'observation' aspects.

A great deal of tangible case study data provides the basis for the case. The scope – both breadth and depth of the data collected – impacts on the reliability of the case, and, therefore, as suggested by Yin (2009:119), there is a need to provide raw data or an evidence 'database' so that other investigators can access the evidence directly. For the duration of this study, data and processes have been carefully tracked and documented, and are available for scrutiny (see Appendix A: Supplementary documentation).

Whatever the approach, the case study researcher must preserve a chain of evidence as each analytic step is conducted (Yin, 2009:123). Since missing data are a source of potential bias, care needs to be taken that the case write-up is comprehensive with the requisite amount of detail (Jauch, Osborn & Martin, 1980:518).

Yin (2009:38) distinguishes between two types of generalisability: statistical and analytical. The latter has applicability for case studies where existing theory is compared to case study findings. The conditions for replication claims are where two or more cases support the same theory, according to Yin (2009:38). Whilst this study does aim toward analytic generalisation, the choice of a single case design, as well as the scarcity of corroborating research on behaviour in establishing a learning culture in an organisation, precludes an outright claim.

2.9 Ethical considerations

Ethical behaviour in research is important to protect personal and organisational integrity in the whole process, as well as more specifically in the data gathering and data analysis phases (Gibbs, 2011:7-8). These two aspects are discussed below along with the complete member researcher perspective.

Broad principles of ensuring that no harm is done during the collection of data, that respect is given to the respondents involved while collecting data, as well as principles of fairness and honesty were adhered to.

At the outset of the study the organisation was approached to gain permission to conduct the research, and this was followed up with periodic updates to executive leadership on progress as well as a schedule of where and from whom data was being collected.

To protect the individual, the outline of questions to be asked was provided before interviews, with an indication that these covered the key focus areas but that the

interview was to be informal and the questions semi-structured. Anonymity and confidentiality were assured and a careful process of storing and encoding the voice recordings and transcripts was done after the interview to ensure the integrity of the confidentiality at all levels (Gibbs, 2011:8,102). These recordings and transcripts were never backed up on the public server – rather they were stored on the researcher's personal drive as well as backed up on a personal external drive.

Ethical principles were adhered to in this study – including gaining informed consent, respecting confidentiality and requests for anonymity and privacy as well as being sensitive to concerns of participants (McMillan & Schumacher, 2001:420-1).

During the data analysis phase of the research, care was taken to be aware of the following: the potential for bias, misrepresentation of the results of the study, and conducting research in a responsible and professional manner.

The nature of grounded theory is to produce thick descriptions, and during analysis the conflict of aspects of valuable data which could lead to the disclosure of the identity of the contributor needed to be managed.

Before the submission of the research findings, the key organisational sponsor was given the whole report as well as a brief overview of the findings. The framework, namely "Complex web of relationships" (figure 17, p. 99), was also discussed in detail with executive leadership.

As a complete member researcher conducting research within my own organisation and engaging with senior management as well as other contributors to the research input, cognisance had to be taken of privilege attached to my position which provided access based on trust and openness that was already established. As Tietze (2012:58) notes, this 'closeness' has inherent challenges and can pose ethical dilemmas. Managing these challenges included ensuring that interviews were recorded and transcribed so as to provide the full record of the discussion to be used for analysis.

2.10 Chapter summary

The ontological, epistemological and philosophical paradigms were discussed in the beginning of this chapter. Critical realism as a research philosophy was explained. The philosophical paradigms used influenced the research design, and these were presented along with the methodological implications for data collection and data synthesis. The rationale for a qualitative approach was explained, providing detail on the complete member researcher perspective in the formulation of a single case study. This was followed with an outline of the protocol used and the data collection and analysis processes.

The plan for the case narrative and the use of the Rationale® software tool were described, and the importance of research rigour was explained. The ethical considerations underpinning the entire research process were detailed along with examples.

In Chapter 1, the background to the study, as well as a review of the problem, was presented, and in Chapter 2 the research plan was discussed. The intention to examine the role of behaviour within the organisation needs to be informed by extant literature before proceeding to the case study. The next chapter is a synopsis of the literature that was reviewed for the purposes of the research study.

3 LITERATURE REVIEW

3.1 Introduction to the literature review

In Chapter 1 the purpose of the study was described as the need to explore the role of organisational behaviour in setting up an academy in a large corporate in the construction industry. The problem and the context were described in detail, as were the research design and methodology that followed in Chapter 2. As a precursor to the commencement of the data-gathering phase, as outlined in Chapter 2, a focused literature review was conducted in order to establish parameters for the research as well as to become familiar with concepts and existing research.

Guidance from Charmaz (2010:166-167) is to leave the initial literature review to lie 'fallow' until the categories and analytic relationships between them have been developed and then to enfold the literature in a discussion of the findings. This chapter encapsulates the initial literature review that provided an overview of the existing body of knowledge around the key concepts that were anticipated to have high relevance for the research.

This initial literature review was done in the areas of *organisational behaviour*, *learning organisation culture*, *organisational learning* versus *learning organisation*, and *corporate universities*. The review highlighted the gap around the concepts of organisational behaviour and corporate universities, and the establishment of a corporate university. The gap around links between organisational behaviour and corporate universities in South Africa was more pronounced, and in general little

literature was found dealing comprehensively with corporate universities in the construction industry.

The literature review that follows in this chapter provided the theoretical framework against which data was collected and analysed. In Chapter 11, a further review of literature was enfolded in a process of constant comparison (Charmaz, 2010:165; Eisenhardt, 1989:544).

3.2 Organisational behaviour: a foundational concept in this study

When embarking on this research, one of the first tasks was to ensure that the title chosen for the dissertation was appropriate, and this led to a search for definitions of the term 'organisational behaviour'. Starting with the base-line definition in the prescribed course text book (Robbins, Odendaal & Roodt, 2003:7) it promised to be an easy task. It soon became apparent that only scholarly books offered definitions of OB, and that these definitions were notably absent in academic articles. A summary of the definitions gleaned is provided in Table 11 below.

Table 11:   Definitions of organisational behaviour

Source	Definition
Robbins, Odendaal and Roodt (2003:7)	"Organizational behaviour is a field of study that investigates the impact that individuals, groups and structure have on behaviour within an organization for the purpose of applying such knowledge toward improving an organization's effectiveness."
Luthans (2002:23)	"Organizational behaviour can be defined as the understanding, prediction and management of the human behaviour in organizations."
Nelson and Quick (2012:4)	"Organizational behaviour is [the study of] individual behaviour and group dynamics in organizations."
Schermerhorn, Hunt and Osborn (2008:5)	"It [OB] is an academic discipline devoted to understanding individual and group behaviour, interpersonal processes, and organizational dynamics with the goal of improving the performance of organizations and the people in them. "

Schermerhorn, Uhl-Bien and Osborn. (2011:4)	"Organizational behaviour is the study of individuals and groups in organizations."
Konopaske and Ivancevich (2004:5)	"[OB is] [t]he study of human behaviour, attitudes, and performance within organizational settings; drawing on theory, methods, and principles from such disciplines as psychology, sociology, and cultural anthropology to learn about individuals, groups, structures, and processes."
McKenna (2006:698)	"[OB] is the study of human behaviour in organisations; it is concerned with the relationship between the individual and the group, and how both interact with the organisation."
Kinicki and Fugate (2012:5)	"OB is an interdisciplinary field dedicated to better understanding and managing people at work. By definition, organizational behaviour is both research and application oriented. Three basic levels of analysis in OB are individual, group and organizational."

In the definitions above, Kinicki and Fugate (2012:5) and Konopaske and Ivancevich (2004:5) make the important point that OB is an interdisciplinary field. A number of the definitions mention different levels; being either individual and group, or individual, group and organisational. Two further points are worth noting; firstly that the verbs used include understanding, prediction and management, and secondly, that outcomes are suggested as being organisational effectiveness and improving performance. McKenna's (2006:698) definition moves from the purpose of pragmatics, such as effectiveness or performance, to a more behaviourally focused orientation. This more subjective perspective resonates with Brief and Weiss (2002:280) who note that organisational behaviour is concerned with the influence of organisations on people, and people on work organisations. This is abstracted by Costea and Crump (1999:404) who point to the focus of organisational behaviour on the soft or human side of business life.

Miner (2007:xii) provides a more wide ranging 'definition' which proposes that OB has to do with organisations, and while the exact boundaries of the discipline are 'fuzzy' there are two key concerns; firstly, behaviour and the nature of people within the organisations, and secondly, and closely allied thereto, the behaviour and nature of organisations within their environments. This is echoed by Rousseau (1997:516) who notes that organisations exist within a dynamic environment and face numerous challenges that influence behaviour at an organisational level.

For the purposes of this study, the definitions provided by Kinicki and Fugate (2012:5) and Luthans (2002:23) are attractive as they refer to *understanding* and *managing* behaviour, and these have direct implications for the implementation of a corporate university in an organisation. The deepest level of resonance, however, is with the broad 'definition' provided by Miner (2007:xii) which looks at behaviour within the organisation as well as the environmental dynamics.

These environmental or meso-level perspectives have become increasingly important considerations for organisational learning and corporate academies as noted in Table 1 in Chapter 1.

Some key environmental challenges identified by Palmer and Hardy (2000) are summarised in the table below.

Table 12:   Environmental challenges

Adapted from Palmer and Hardy (2000:15)

Hyper-competition	Increased competition is eroding traditional sources of competitive advantage.
Globalisation	Geographic boundaries are becoming more permeable and change the nature of economic transactions.
Short product life cycles	Technological advances combined with a proliferation of marketable products raise the bar with respect to customer expectations.
Technological change	Technology is becoming cheaper and creating new opportunities for products, services and markets.
Turbulence	Changes in customer demands and markets are faster and more unpredictable.
Corporate responsibility	The range of 'citizenship' responsibilities are increasing, including the need for diversity, work-life quality, the environment and professional standards.
Customisation	Satisfying the customer requires an increased tailoring of products and services.

The intention of this study was to embrace the complexity of the context (Johns, 2006:386; Rousseau & Fried, 2001:1) through the observation of the facts, events and points of view, and to use organisational behaviour as a lens to examine the way the organisation drives learning and to examine the behavioural implications during the course of the establishment of the corporate academy in the organisation.

3.2.1 Initial conceptual expectations in approaching the research

Initially it was envisaged that the establishment of a corporate university would entail engaging with both the organisational and the individual levels of the field of organisational behaviour. At the individual level it was thought that the study would be less of a micro view, and more of an aggregation of behaviour which would paint the picture, notwithstanding a need to be aware of possible influencers, such as individual learning, motivation and job satisfaction. At an organisational level, the contribution of corporate culture and the organisational environment were considered to be essential elements of the study. The holistic view required was seen to incorporate an understanding of the manner in which the environment influenced the behaviours of role players – and hence a systems and contingency view was taken to provide the foundation for a broader view.

3.2.2 The systems and contingency approaches

In any business there are interactions and influences that go back and forth across the different levels, and there are two useful approaches (Needle, 2004:39) to understanding the nature of these interactions: the systems approach and the contingency approach.

Needle (2004:39) briefly outlines the concepts as follows:

> "The systems approach is a view of business involving two related concepts. First, businesses are made up of a series of interactions, involving the various business activities, the various aspects of the organisation, and aspects of the environment. What we identify as a business is the sum total of all these influences and interactions. Second, the systems approach views business as a series of inputs from the environment, internal processes and eventual outputs."

Underpinning this study was a comprehensive systems thinking perspective that did not view behaviour in isolation but rather took a view of the context and the interrelationships that presented themselves.

Needle (2004:39) continues:

> "The contingency approach focuses on the relationship between the organisation and its environment. It embraces the notion that business activities and the way they are organised are products of the environment in which they operate. The most successful businesses are therefore those that are organised to take advantage of the prevailing environmental influences."

Learning in organisations is very context driven as it needs to be current, relevant and driven by the future needs of the organisation. A contingency approach was relevant to the study, and, more broadly, it was also relevant to organisational learning.

3.3   A learning culture in the organisation

In this section, the concept of *organisational culture* is discussed commencing with some definitions and followed by a brief explanation of some of the key contributions to existing theory. This then provides the platform for the discussion in the next section regarding *organisational learning*.

3.3.1   Definition of culture

The word culture has become a useful metaphor to understand prevalent influences within organisations (Schein, 1990:109). Whilst there is no real agreement on the meaning of culture, many different key definitions have been proposed. Some of these definitions are noted below.

'The way things are done around here', is arguably the most well-known and succinct 'definition' of culture (Palmer & Hardy, 2000:118). More comprehensively, Jaques and Clement (1994:266) suggest that: "Corporate culture comprises the established ways of thinking and doing things in the institution and includes the company's policies, rules, and procedures; its customers and practices; its shared values and belief systems; its traditions and assumptions; and the nature of the

language used to communicate throughout the company". Jaques and Clement (1994:266) imply that culture is fairly fixed, which is at odds with the concepts of learning and adapting to a dynamic environment.

Culture reflects the ideologies, shared philosophies, values, beliefs, assumptions, attitudes, expectations and norms of an organisation, according to Kilman, Saxton and Serpa (1985:5); thus, culture emerges over a period of time.

Handy (1999:181) suggests that culture is expressed tacitly and underpins daily organisational activities. He notes that the deep-seated beliefs around the organisation of work, the exercising of authority, the way people are rewarded and the way people are controlled are intrinsic aspects of culture in organisations. According to Handy, culture is accessible to leadership and can be altered.

Along similar lines but implying more firmly embedded characteristics, Kotter and Heskett (1992:4) state: "At the deeper and less visible level, culture refers to values that are shared by the people in a group and that tend to persist over time even when group membership changes. At the more visible level, culture represents the behaviour patterns or style of an organisation that new employees are automatically encouraged to follow by their employers". In this definition, values are the essence of culture, and they are implicit within the daily interactions. Culture can and does change, but usually only incrementally and over a period of time as a reflection of patterns of behaviour.

Schein (1985:9) proposes that culture is a "pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaptation and internal integration, and that have worked well enough to be considered valid, and, therefore, to be taught to new members as the correct way to perceive, think and feel in relation to these problems". Schein's view is that culture is group generated and that it is adaptive in order to solve problems, that it constantly evolves based on experiences and that it filters throughout the organisation. The implications for learning are that culture cannot be imposed but rather that it is flexible depending on the conditions and difficulties that groups within the organisation encounter.

This latter definition of culture by Schein (1985:9) has the closest resonance with this study as it refers to discernible *patterns*, assumptions underpinning *group* behaviour, *external adaptation* and *internal integration*. In addition to this, the indication that culture is *flexible* based on collective learning has relevance for understanding learning organisations, organisational behaviour and corporate academies.

Based on these definitions, a number of theories regarding culture have emerged and a few significant contributions are discussed in the next section.

3.3.2   Review of major theoretical contributions

Organisational culture can be viewed on three levels, according to Schein. These levels comprise artefacts, values and basic underlying assumptions (Schein, 1985:14): artefacts refer to the visible dimensions of culture (language, behaviour, physical space and outputs of the group); values and beliefs are the basis for actions, and they are the normative elements of the organisation; and basic assumptions are unconscious and guide behaviour (including personal feelings and attitudes to things).

In their definition of culture (in section 3.3.1 above) that refers to visible and deeper-level values, Kotter and Heskett (1992:51) suggest that adaptive corporate cultures have different values and behaviour patterns to non-adaptive cultures. Inclinations to change or risk-taking are indicative of a strong learning culture, along with a customer orientation and awareness of the external environment. Table 13 below summarises Kotter and Heskett's adaptive and non-adaptive corporate cultures.

Table 13:   Adaptive vs non-adaptive corporate cultures

Adapted from Kotter and Heskett (1992:51)

	Adaptive corporate cultures	Non-adaptive corporate cultures
Core values	Managers care about customers, shareholders, and employees. They also value people and processes that can create useful change.	Managers care about themselves, their immediate work group, or some product associated with that work group. They value the orderly and risk-reducing management process much more highly than leadership initiatives.

	Managers pay attention to all constituencies, especially customers, and initiate change when needed to serve their legitimate interests, even if it entails taking some risks.	Managers tend to be isolated, political, and bureaucratic. As a result they do not change their strategies quickly to adjust to or take advantage of changes in their business environments.
Common behaviour		

Hofstede, Neuijen, Ohayv, & Sanders (1990:286) view culture as mental programming as it influences why individuals think, perceive and behave in a particular manner, and as it reflects particular patterns of behaviour within certain environments. Hofstede (1984:65-178) proposes four dimensions of national culture which include individualism/collectivism, power distance, uncertainty avoidance and masculinity.

If applied to organisations, the above four dimensions can be used to determine the culture and the best leverage points for action. They can also provide a lens through which to view tendencies within cultures, albeit a simplification of the dynamic complexities present in all organisations.

In organisations it is possible to identify certain stereotype cultures – Handy, Hofstede, and Deal and Kennedy provide examples of these (see Table 14).

Table 14:   Examples of types of culture

Handy (1999:183-191)	Deal and Kennedy (1982:107)	Hofstede (1984:65-178)
Power culture Often found in small entrepreneurial organisations; relies on trust and personal communication for effectiveness	*Tough-guy, macho culture* Organisations with individualists who take high risks; financial stakes are high and the focus is on speed; the pressure and frenetic pace usually results in high staff turnover	*Individualism/collectivism* Emphasis on personal or social community interests
Role culture Found in bureaucracies and functions due to logic and rationality; division of work and hierarchies enforce this culture; position is more important than the individual	*Work-hard/play-hard culture* Fun and active environment with few risks; usually high-customer-contact businesses with rapid feedback	*Power distance* Degree of centralised authority
Task culture The bringing together of resources and people is essential; influence is diffused – often characteristic of a matrix structure; project oriented	*Bet-your-company culture* High-risk environments with slow feedback times – e.g. property development; planning and slow deliberation are characteristic; driven from top down	*Uncertainty avoidance* Emphasis on policies and controls to manage an unpredictable future

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Person culture	Process culture	Masculinity/femininity
The individual is the central focus and the structure exists for the individuals within it; mutual consent is required by the small groups – e.g. lawyers, consultancies	Slow-feedback culture characteristic of large established hierarchical organisations – banks etc.; paperwork is emphasised and a blame culture is prevalent; focus is on *how* things are done rather than *what*; no understanding of the bigger picture	Division of activities determined by proclivities

3.3.3 Commitment needed to establish a learning culture

If culture is seen as 'the way we do things around here', then the implications for learning and creating a learning culture pose some challenges. Culture could be a mechanism for promoting learning, but equally, in an autocratic environment, learning would more than likely be seen as a threat to the status quo. A learning culture implies a capacity of an organisation to adapt to external and internal demands. Given the significant changes faced by Group Five, the case for change was very strong.

Organisations need to ensure that the requisite variety (Ashby 1958:83) of existing customers and strategies are taken into account, and that the gap between future aspirations and current capacity is being addressed by stimulating and guiding continuous learning. In order to do this, the organisation and the individuals within need to show characteristics of commitment, flexibility in the face of change and conflict, and a willingness to learn through experience (McGill *et al.*, 1992:10-11). Collective identity and ability to work effectively towards agreed goals are what organisations strive for. Through effective communication and by operating within accepted norms the organisation presents a united front to customers and competitors (McGill *et al.*, 1992:9).

For a learning culture to be sustainable, effective and committed leadership needs to nurture and facilitate learning and conditions conducive to learning (Senge *et al.,* 1994:341-2).

3.4 Organisational learning or the learning organisation?

In a fast changing business environment, organisations need to actively explore new models that support excellence and increased competitiveness (Rousseau, 1997:530, Jamali, Khoury & Sahyoun, 2006:347). The concept of an organisation engaging in the process of learning and becoming a learning organisation is one of the avenues to achieve both excellence and competitiveness. This is discussed in the section below.

3.4.1 Definition of organisational learning

The term 'organisation' as a noun is defined by Allee (2003:265) as "a complex adaptive social system where people systematically cooperate to achieve a common purpose". The social system creates and sustains the structure. Definitions of organisational learning then fall within these concepts.

Argyris and Schon (1978:19) describe organisational learning as being conducted by individuals but this learning becomes embedded in the organisational memory. In their view, individual learning is facilitated or inhibited by the organisational environment. Argyris (1995:20) also explains organisational learning as the process of "detection and correction of errors".

Huber (1991:88) suggests that four constructs form the basis of organisational learning, these being knowledge acquisition, information distribution, information interpretation and organisational memory. He further clarifies: "An entity learns if, through its processing of information, the range of its potential behaviours is changed" (Huber, 1991:88).

Fiol and Lyles (1985:803) define organisational learning as: "The process of improving actions through better knowledge and understanding". In reflecting on organisational learning, Kim (1993:37) states "whether they consciously choose to or not … it is a fundamental requirement for their sustained existence".

3.4.2   Definition of a learning organisation

Peter Senge (1990:3) notes that learning organisations are "in the simplest sense … a group of people who are continually enhancing their capability to create their own future". He expands on this by suggesting that a learning organisation is "where people continually expand their capacity to create 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" (Senge, 1990:3).

In clarifying the concept of a learning organisation, McGill *et al.* (1992:16) propose that it is "a company that can respond to new information by altering the very 'programming' by which information is processed and evaluated". Furthermore, it is an organisation that is able to gain insight and understanding from experiences garnered through experimentation that necessarily involves the risk of failure.

Pedler, Burgoyne and Boydell (1991:1) take a similar but broader perspective to Senge (1990:3) and note that: "A learning company is an organization that facilitates the learning of all its members and continually transforms itself".

Schon (1973:28) takes a very transformative view in noting that: "We must become able not only to transform our institutions, in response to changing situations and requirements; we must invent and develop institutions which are 'learning systems', that is to say, systems capable of bringing about their own continuing transformation".

Learning has become a fundamental feature of our contemporary world, and it is necessary to develop social systems that can learn and adapt. How the concept becomes practice is argued in the definitions above – whether it is a process, or whether it is driven tacitly by leadership, or whether, as Schon (1973:28) suggests, there is the need to invent and develop institutions that are capable of learning. In this study, Schon's view is subscribed to as it suggests that active participation makes a learning organisation a possible outcome rather than an aspirational goal.

3.4.3 Models of learning within organisations

A brief look at some of the key learning models follows in the section below.

Organisational learning originates in the individual, according to Senge *et al.* (1994:139), and more specifically in what they call 'personal mastery'. One caveat is clearly noted that while individual learning is the cornerstone it does not guarantee organisational learning. Senge (1990:141) notes that individuals with high levels of personal mastery have the ability to create the results in life they truly seek. From the individual pursuit for continual learning comes the essence of the learning organisation.
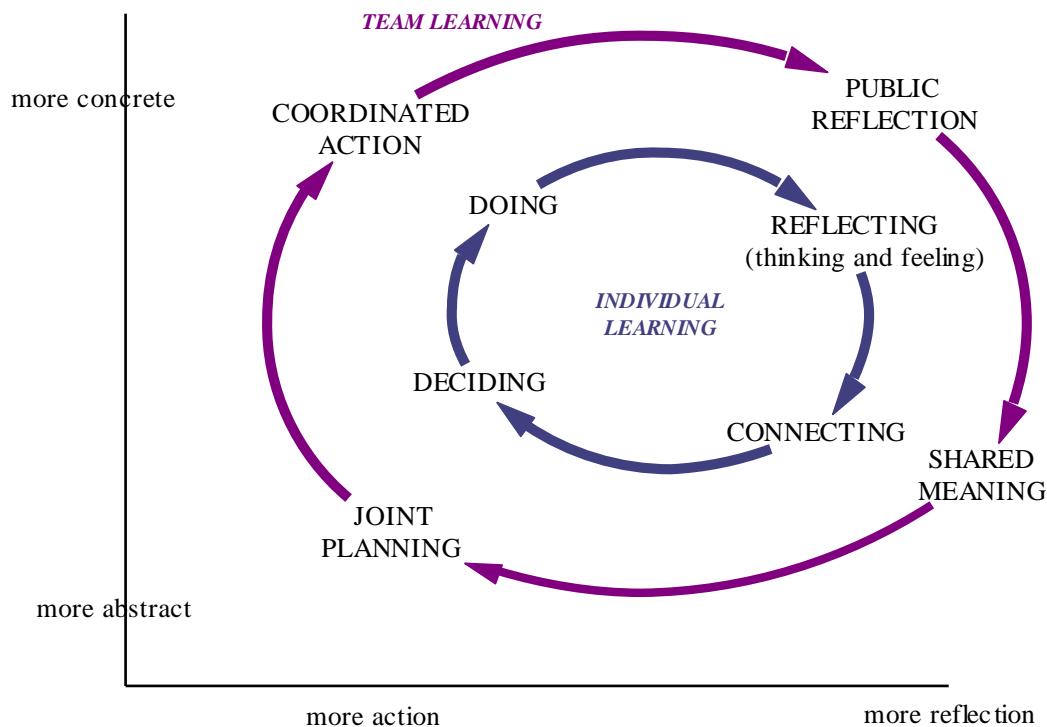
Figure 15: Team learning wheel

Adapted from Senge *et al.,* (1994:62)

Senge, Kleiner, Ross, and Smith (1994:62) suggest that people learn in a cyclical fashion, and by extension, so do teams (refer Figure 15 above). Managers need to understand this cycle and stimulate the process by creating time for reflection, discussion and interaction, as well as by allowing room for 'failure' in order to promote and sustain learning. The model in Figure 15 indicates the learning interface between individual and group, and due to the cyclical nature of learning

there is an implied dynamic transfer of knowledge between them which goes to and fro.

For De Geus (1999:187), the concept of the learning organisation is based on 'planning as learning' (as implemented at Shell). The highly dynamic environment of the oil industry led De Geus (1996:94) to state: "The only relevant learning in a company is the learning done by those people who have the power to act. So the real purpose of effective planning is not to make plans but to change the microcosm, the mental models that these decision makers carry in their heads". De Geus (1996:94) sagaciously notes that the key impact is internal: through the sharing of mental models, the future is anticipated and managed in a proactive, innovative manner.

Mumford (1995:15) suggests that an organisation needs to consider developing behaviours and practices that stimulate continuous development through initially stimulating individual learning and then moving through one-to-one learning relationships to group learning and thus finally motivating organisational learning.

According to Garvin (1993:90), organisational learning takes place through three overlapping stages: the first is cognitive where employees are exposed to new ideas which expand their knowledge; the second is behavioural where employees internalise new insights which impact on behaviour; and the third is performance improvement.

Marsick and Watkins (2003:135) suggest that the external environment triggers learning and that key people formulate a response through alignment of vision, shared meaning and a collaborative capacity which leads to collective action.

Organisational learning is a dynamic concept contingent on the existing culture of the organisation and equally dependent on the external environment which in large measure influences the rate of change that is required.

3.4.4 Organisational learning and linkage to study

Given the need for organisations to not only adapt but to constantly pursue innovation at an increasing pace and breadth, *organisational learning* is a foundational concept to be embraced and promoted. It is, however, the concept of a *learning organisation* which is more holistic and encompassing, emphasising the need for continuous learning on the part of all employees to meet the vibrant challenges of a shifting future. This study aims to surface organisational behaviours that impact on learning in organisations.

The valuable point noted for the attainment of a learning organisation is the focus on *how* it learns (generative learning), rather than *what* it learns (adaptive learning). Thus it is the process rather than the result which distinguishes a learning environment. This ability lies in a cognitive ability to think systemically, openly and creatively. Understanding the behaviours that promote a culture which supports learning is the purpose of this study.

3.5 Introduction to corporate universities

3.5.1 Context as a rationale for a corporate university

Globally, social turbulence and complexity due to wider responsibilities, and a general failure in corporate ethical matters have a filtered-down impact particularly on larger international companies (Campbell & Dealtry, 2003:368).

Sir Christopher Ball is quoted as having said, "Existing systems produce existing results. If something different is required the system must be changed" (cited by Blass, 2005:65). Faced with increasing regulation, discussion around an industry-specific construction charter, pressure from the Competitions Commission, and an environment of increasing competition (Lawless, 2005:3-16), a logical next step for Group Five, like many other companies globally faced with equally challenging circumstances, was to consider a corporate university as a means of creating a diverse and well-educated workforce to deal with the many challenges faced (Arnone, 1998:200).

At the time when Group Five was seriously considering implementing a corporate university, two particularly relevant statements were made about the labour situation in South Africa – the first by the South African Regional Poverty Network (established by the Human Resources Research Council (HSRC) in 2001), and the second by the Minister of Labour in his speech in Parliament on 17 June 2006. These are quoted below:

> According to the Department of Labour, between 1990 and 1998, formal employment of semi-skilled and low-skilled workers fell by 19% (or approximately 700 000 jobs), while employment of skilled and highly skilled workers rose by 12% (or 80 000 jobs). Across the various sectors a similar pattern in labour usage is evident: while demand for low- and semi-skilled workers has declined, the demand for skilled and highly skilled workers has increased. During this period, two important changes occurred in the economic environment, namely a process of liberalisation of the economy, and the rapid uptake of technology in all sectors. Both of these developments favoured skilled labour.
>
> Antonie (2004)

> My visit at Indlela a fortnight ago brought home to me the importance of having to ensure that theoretical training always goes with practical training. The theoretical training that our colleges continue to churn out to artisans surely has to be reviewed. Apprentices that register with Indlela to be assessed on their skills are failing dismally. Some end up being referred back for further training on both the practical and theoretical side as they often know very little. If this trend is left to continue at our further education and training (FET) colleges and private institutions, then our plans for JIPSA are in trouble. It is little wonder we have so many fatalities of collapsing building structures. It says a lot about the calibre of training that our artisans are receiving.
>
> Department of Labour (2006)

Both of these statements directly comment on the demand for skilled labour, as well as on the slow and poor graduate outcomes. The lack of skill within the industry

impacts on the ability of organisations to deliver within specification, budget and time frames, thus impacting on profitability and sustainability.

According to Campbell and Dealtry (2003:368), mainstream management theory and paradigms no longer provide effective frameworks for the dynamic cultural and structural changes in a modern and competitive global business environment. They suggest that 'think global, act local' is a useful mantra for management action with the focus on acting towards solutions. The capability of today's manager requires a wider focus and set of competencies.

Given the challenges in a dynamic environment as well as the need to be globally competitive, a home-grown focus on people development provides the impetus for a number of large organisations to consider the option of a corporate university (Meister, 1998:ix).

Corporate universities have been in existence for a number of years (Meister, 1998:ix; Nixon & Helms, 2002:145) and for a number of reasons. A study by Andreson and Irmer (2000:24) established two main reasons for the existence of corporate universities, namely to fill gaps in traditional training received, and to address company-specific requirements. According to Meister (1998:22-23), traditional training lacks relevance. This is reiterated by findings by Holland and Pyman (2006:20) that corporate universities came into being because of the frustration of business with the quality and content of post-secondary education on the one hand and the need for lifelong learning on the other.

According to Dealtry (2008:72), the concept of the corporate academy is gaining acceptance globally, and its value is increasingly being recognised as a powerful mechanism for energising high-quality work, inspiring new learning and also for underpinning the profile of a company as an employer of choice. This is supported by Meister (2006:28) who suggests that business leaders are actively involved in driving learning investments.

3.5.2 Definitions and clarification of terms

According to Beaver and Prince (2001:190) the term 'corporate university' has a multitude of meanings to different stakeholders – thus it is necessary to look beyond the words to the underlying role, functions and processes that such an institution performs. This view is further evidenced quite simply in the diverse definitions – a few of which are listed below.

Beaver and Prince (2001:190) note that the Concise Oxford Dictionary defines the term 'university' as an "educational institution designed for instruction, examination, or both, of students in many branches of advanced learning, conferring degrees in various faculties and often embodying colleges and similar institutions". Not many corporate universities would meet or indeed wish to meet these criteria (Beaver & Prince, 2001:190). The term 'university' is viewed from an aspirational and symbolic positioning of learning within an organisation (Thomas, 1999).

Meister (1998:29) defines a corporate university as the strategic umbrella for developing and educating employees, customers and suppliers in order to meet an organisation's business strategies.

El-Tannir (2002:76) sees the corporate university as an emerging model for continuous training in the corporate world, and continuous learning for employees. Thus El-Tannir's definition states that a corporate university is "a function or department in the company that develops the skills of employees, and integrates them into the strategic orientation of the corporation with strong emphasis on leadership and improved work-related performance".

Beaver and Prince (2001:191) note that the corporate university is not so much a physical edifice as much as a concept used to denote organised learning to benefit individuals and organisations.

A distillation of the various definitions indicates an emphasis on organisational strategy and the meeting of business needs. The broad yet succinct definition provided my Meister (1998:76) incorporates stakeholders and linkages to business strategy which have the most direct resonance with this study.

3.5.3   Business needs and drivers

A fundamental of the corporate university is that it is totally *business centred* and that the performance of the corporate university is inextricably linked to that of the business (Arnone, 1998:200; Campbell & Dealtry, 2003:370). An example of this is a case studied by Holland and Pyman (2006:28) in which the key driver for the organisational strategy was 'quality, responsiveness and timeliness', and this became a hallmark of the corporate university strategy to ensure alignment and support in achieving the desired goals.

Providing a corporate perspective of the business needs, Meister (1998:1) states that:

> To understand the significance of these corporate universities as both a state-of-the-art model for higher education and, in a larger sense, a key instrument for cultural change, it is necessary to understand the broad forces that have supported this phenomenon. Essentially there are five: the emergence of the flat, flexible organisation; the transformation of the economy into a 'knowledge economy'; the shortened shelf life of knowledge; the new focus on lifetime employability rather than lifetime employment; and a fundamental shift in the global education marketplace. These broad trends point to a new key vehicle for creating a sustained competitive advantage – the company's commitment to employee education and development.

Along a similar vein, El-Tannir (2002:77) clarifies the mission of a corporate university by suggesting the curriculum should encompass three foundational factors: firstly creating corporate citizens that collectively subscribe to the values, vision and culture of the organisation; secondly providing a contextual framework that builds knowledge of customers, competitors, trends and best practice; and thirdly building core competencies through knowledge transfer from experts to learners.

Indeed, companies in some instances do not embark on setting up a corporate university but rather they are driven by the increasingly visible connection between a

company's market value and the quality of its intellectual equity represented by their management (Dealtry, 2000:171).

According to Nixon and Helms (2002:147), the corporate university serves as a vehicle to address many of the unique business problems facing the company. They further note that employees see the corporate university as a statement that learning is important in the company, and, by association, that it is a tool to further their careers as well as to assess current and future needs. The link to attraction and retention of employees is thus strong (Blass, 2005:60; El-Tannir, 2002:77; Nixon & Helms, 2002:147).

Companies implementing a corporate university demonstrate a significant financial commitment as well as a long-term perspective (Arnone, 1998:199).

3.5.4   The purpose and role of the corporate university

The corporate university should be a strategic paradox, according to Campbell and Dealtry (2003:380). To clarify, they suggest that on the one hand it should be a primary source for generating and evaluating keen-edged, world-class business and organisational development solutions, and on the other hand it should provide the places where on-going, unrestrained innovation and experimentation can take place – in an environment conducive to learning. They further suggest that the corporate university has a number of objectives (Campbell & Dealtry, 2003:370), which include:

- providing continuous improvement strategies and methodologies that guide a particular way of working
- providing tools, processes, models, training, and delivery channels of a high standard
- providing skilled resources at all levels
- promoting collaboration, knowledge-sharing and supporting the development of strong, effective working relationships
- creating a body of business knowledge that is accessible 'just in time'
- making the above suggested products and services readily available through physical and virtual delivery channels

- contributing to positive and responsive customer-focused attitudes and behaviours
- enabling and contributing to elimination of 'waste' and enhancement of the value chain

The organisational contribution of a corporate university, according to the perspective of Taylor and Philips (2002), includes the following:

- increasing the rate of learning within the organisation to counteract the increased rate of change in the environment
- responding to the challenges of globalisation, including the use of technology
- aligning business goals and learning strategies
- enhancing corporate culture even in the face of diverse local cultures
- focusing role-player attention on the key role of learning and development in creating and sustaining a competitive advantage

Whilst there is some overlap in the two perspectives above, the net result is a considerable list of expectations. In summary, the focus on the development of employees can be linked to the promotion of the corporate university as a catalyst for strategic people development to facilitate competitive advantage (Holland & Pyman, 2006:20; Homan, Macpherson & Wilkinson, 2005:34; Meister, 1998:1).

3.5.5   Corporate universities and knowledge management

In a dynamic environment, getting people to work together in cross-functional teams and to focus on learning projects is a way of overcoming obstacles and facilitates the building of both trust and social networks (Campbell & Dealtry, 2003:373). The social aspect of learning is essential as knowledge and learning are activities and processes that take place primarily within and between individuals (Beaver & Prince, 2001:194). Blass (2005:64) notes that the corporate university forms the backbone of the knowledge-sharing process, and when knowledge is shared, it can be expanded and enhanced. The corporate university must strategically develop approaches to ensure that the appropriate levels of training and development are available and utilised in order to meet organisational objectives (Holland & Pyman, 2006:21). In addition, both the environment and the resources necessary must

enable the learning behaviours and drive collaboration (Campbell & Dealtry, 2003:374).

Corporate universities provide real work-based challenges, experiential activities and tailored learning opportunities, frequently with the direct input of key organisational stakeholders (Arnone, 1998:203-24; Blass, 2005:65; El-Tannir, 2002:77), and they are able to directly influence the rate of change (Blass, 2005:65). Corporate universities have become more than 'dressed-up training departments with a new name' – rather they are the best possible vehicles to develop all levels of employees in the skills, knowledge and competencies needed to be successful (Meister, 1998:x). It would be difficult for a traditional university to provide many of these elements given that organisations each have very diverse needs.

Partnerships established with traditional universities (and other external vendors) provide benefits of access to a greater array of specialised or formal programmes, and this practice extends the levels and diversity of learning supported by the organisation (Beaver & Prince, 2001:195; Holland & Pyman, 2006:27).

Traditional universities have advantages in some areas where the corporate university falls short, and, according to El-Tannir (2002:77), these include:

- being proprietary there are limitations to range of delivery
- recognition presents a challenge due to a lack of formal accreditation for the institution and programmes offered
- learning delivery timelines are usually constrained
- limitations on freedom of speech within the confines of the organisation

Many training departments could have the attributes of a corporate university without the name. The difference between traditional training departments and corporate universities is highlighted in Table 15 below.

Table 15:   Typical traditional training vs corporate university training
Adapted from Morin and Renaud (2004:298)

	Traditional training	**Corporate university**
Focus	Focused on individuals; isolated effort in reaction to a particular performance problem	Focused on the organisation; proactive and systemic effort aimed at facilitating the achievement of organisational strategies
Users	Employees	Employees, suppliers and customers
Competencies developed	Job-specific	Supporting organisational transformation and growth based on future focus
Objectives	To increase individual job performance	To increase individual and organisational performance; to support succession planning; to attract and retain employees; to develop a common culture across the organisation; to influence suppliers and customers
Who is in charge	Human resources department	CEO and management team
Structure	Decentralised; activities are fragmented into categories of skills	Centralised; activities are integrated into a global learning strategy
Delivery	Unique approach; mostly done via formal lectures	Blended approach based on action learning and other active methods
Trainers	Subject-matter experts, internal or external	Internal management team and external experts; partnerships with formal universities are very common

3.5.6   Categories of corporate universities

To achieve a sustainable corporate university there needs to be a long-term mission or purpose that is clearly articulated and which has relevance for employees and the leadership of the organisation (Wheeler, 2005:21). A number of authors describe and categorise the roles and functions played by corporate universities – some of these are summarised in Table 16 below:

Table 16:   Categories of corporate universities

Sources	Fresina (in Beaver & Prince, 2001:192)	Walton (in Homan *et al.*, 2005:35)	Paton & Taylor (2002:16)	Wheeler (2005:24)
Categories	- reinforcing and perpetuating current culture and competitiveness - as agents to manage and implement change - as a force to drive and shape the future strategy of the organisation	- first generation, with narrow focus on culture in values; classroom-based - second generation, with wider focus on all levels addressing functional skills, culture and utilising external partners - third generation, with virtual focus	- traditional training school - computer-based training; e-learning - the polymorphous university - the 'chateau-experience' management college	- skill and development focus - external customer focus -change management focus - strategic business focus - research

An added dimension of the approach of Paton and Taylor (2002:16) is a dynamic framework in which organisations can move, change and develop their position in a matrix to reflect a transformation in the focus of their corporate university. It permits an analysis of corporate universities to determine their focus as either functional or strategic – this is depicted in Figure 16 below:
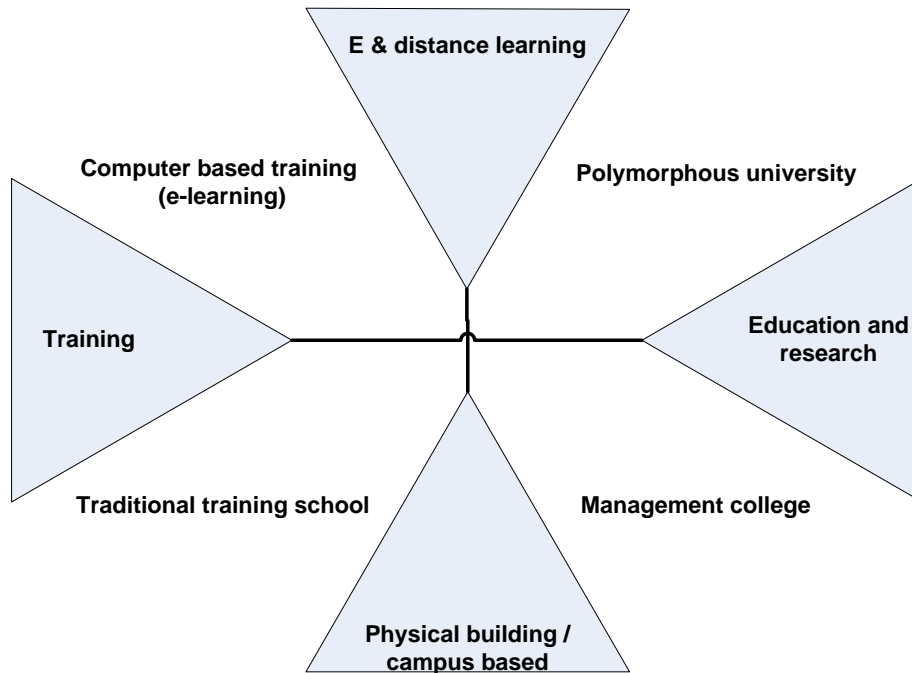
Figure 16: Typology of corporate universities
Adapted from Paton and Taylor (2002:16) and Holland and Pyman (2006:22)

Just as there are no ideal models for organisations, there are no ideal models for corporate universities – the latter are a product of the organisation's engagement with a number of complex internal and external factors (Beaver & Prince, 2001:193; Homan *et al.*, 2005:35). The focus needs to be on the communication and facilitation of social, technological and organisational practices that are centred on learning and knowledge-creating processes (Beaver & Prince, 2001:194), as well as on adapting to the changing needs of the company (El-Tannir, 2002:77).

3.5.7   Organisational and individual benefits

Campbell and Dealtry (2003:374) suggest, as a starting point, that all organisations are searching for unique intellectual, cultural and behavioural paradigms for success.

Corporate universities result in a number of benefits which contribute toward this paradigm, as listed in Table 17 below.

Table 17:   Summary of organisational and individual benefits

Sources: Arnone, 1998:201; Blass, 2005:62-66; Beaver and Prince, 2001:189; Campbell and Dealtry, 2003:369; El-Tannir, 2002:76-81; Holland and Pyman, 2006:27

Individual benefits	Organisational benefits
Provides unique learning opportunities based on categories of individuals	Tailoring of knowledge and skills specific to the organisational requirements
Allows learners to influence and control their professional development	Retention of staff
Promotes critical thinking and creative problem-solving through action-learning opportunities	Capturing and sharing of knowledge
Encourages networking	Sharing of the organisational culture
Speeds up the search for and access to information through collaborative learning	Effecting and facilitating change
Makes learning faster in a social setting	Learning that socially constructs knowledge
Allows personal growth in a supportive environment	Possible spreading of best practice
Allows learners to learn from real business problems and hence develop skills concurrently	Promoting organisational attractiveness as an employer of choice
Motivates learning as it is part of the job, just-in-time and has visible and direct results	Learning that takes place in the job context and culture, which allows an easier transfer of complexity
Promotes a new paradigm of lifelong learning	Sustainability of continuous development

However, not all aspects of individual or organisational learning are positive or without challenges, as can been seen in Table 18 below which depicts enhancers and inhibitors for individuals and corporates.   It is necessary to identify both restrainers and enablers to learning in order to exploit the potential for learning in an organisation.

Table 18:   Individual and organisational enhancers and inhibitors to learning

Adapted from Beaver and Prince (2001:196)

	Enhancers	Inhibitors
Individual	- recognition by others of personal learning - opportunities provided to learn from mistakes	- learned helplessness - managers' belief that they know it all

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	- good personal learning skills - empowering processes in place - accurate and valid feedback on performance - coaching - mentoring - self-directed learning encouraged - a sense of purpose	- managers' status consciousness; entrenchment of status gap - unwillingness to take responsibility - learning not applied outside of the classroom - could-not-care-less attitude about standards - fear - lack of confidence to learn
Organisational	- cross-functional work teams - latitude in management that encourages experiment under supervision - encouragement of dialogue and problem-solving - quality reflection time - intra-company forums - open learning - widespread use of systems thinking - scenario planning - systematic examination of mental models - learning laboratories - action learning - managers as facilitators and involved in learning design	- many management levels - functional separatism - workers confined to narrowly defined tasks - equipment specialised and inflexible - individuals seen as not having a contribution to make - centralised decision-making - bureaucratic culture - preoccupation with getting it done - preoccupation with doing only what is permitted - belief that the workforce is lazy and stupid

A corporate university bridges differences in culture, learning processes and attitudes, and provides access to personal development, continuous improvement, methodology and skilled resources – thereby supporting individuals in improving performance and enhancing job satisfaction (Campbell & Dealtry, 2003:369). These benefits will benefit all stakeholders.

3.5.8 Contributing factors to a platform of success

For a corporate university to have a chance of succeeding requires a number of contributing factors. Some important guidelines by Marquardt (1996:183), Gould (2005:514), Rademakers (2005:135), Marsick and Watkins (2003:132) and Meister (1998:xii-xiii) include:

- senior management support as well as their active involvement
- direct links between learning and the strategic needs of the business
- world-class learning solutions derived collaboratively
- use of technology to accelerate learning

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- examination of the full organisational value change to determine learning participants

The style of leadership of top management and their level of involvement with the learning of their teams need to be re-assessed to align with the unique challenges being faced (Campbell & Dealtry, 2003:372), and communication around business vision, strategy and objectives needs to be clear.

In addition to the need for leadership guidance, Blass (2005:62) notes that there appears to be a relationship between success of a corporate university and the approach of running it as a business, of which important aspects are professionalism, measuring value of investment in education, innovation with new partnerships and on-going improvement.

3.6   Conclusion to the chapter

In summary, the literature reviewed on corporate universities appeared to be largely prescriptive, with a main focus on what they are, or what they do, or indeed simply justifying the corporate university as a legitimate response to challenges faced by the organisation. The literature does provide the reasons for establishing corporate universities or, in some instances, information on the processes for setting up a corporate university. The aspect which seems to be largely omitted is the behaviours required to establish a corporate university in an organisation.

Much of the literature on organisational learning indicates that the role of behaviour of key stakeholders is pivotal but does not extend much beyond the need for visible leadership support. Organisational behaviour provides the paradigm to begin to assess what relationships exist and also the robustness or sustainability of those interactions.

This initial literature review provided the backdrop for this study which was envisaged to examine behaviour and how these behaviours coalesced to form

cohesive and influential comportments in the implementation of a corporate university.

A further examination of literature took place after the findings of the case study emerged, thus engaging in an abductive process rather than a deductive approach (Charmaz, 2010:103). The next section introduces the case study, which follows in subsequent chapters.

4   BACKGROUND TO THE CASE STUDY

4.1   Introduction to the major themes in the case study

The purpose of this study was to explore the role of organisational behaviour at individual, group and organisational levels in the conceptualisation, formation and implementation of a corporate academy within a large organisation. The process of events associated with the evolution of the Academy spans more than five years. This chapter provides a thorough description of the history and success of the Academy within Group Five.

This background chapter is followed by subsequent chapters (Chapters 5 to 10) that unpack the themes that emerged. *These themes were determined through the analysis of the interviews and the archival documents as described in Chapter 2 and are based on the core categories that were the outcome of the coding process followed* (as listed in Table 9: Core categories and sub-categories as an outcome of data analysis, and as summarised in Figure 17: Complex web of relationships). Figure 17 is provided at this point to give insight into the structure of the case study report and to aid understanding of the themes and the relationships (as named in the figure) between the themes. *Figure 17 provides the framework for the supporting evidence* for these core categories as they are unfolded and expanded in the case study chapters that follow (Chapters 5 to 10). The organisational behaviour levels (as depicted in Figure 18: OB levels in web of relationships) are then picked up in the discussion (Chapter 11) which follows after the case study chapters.
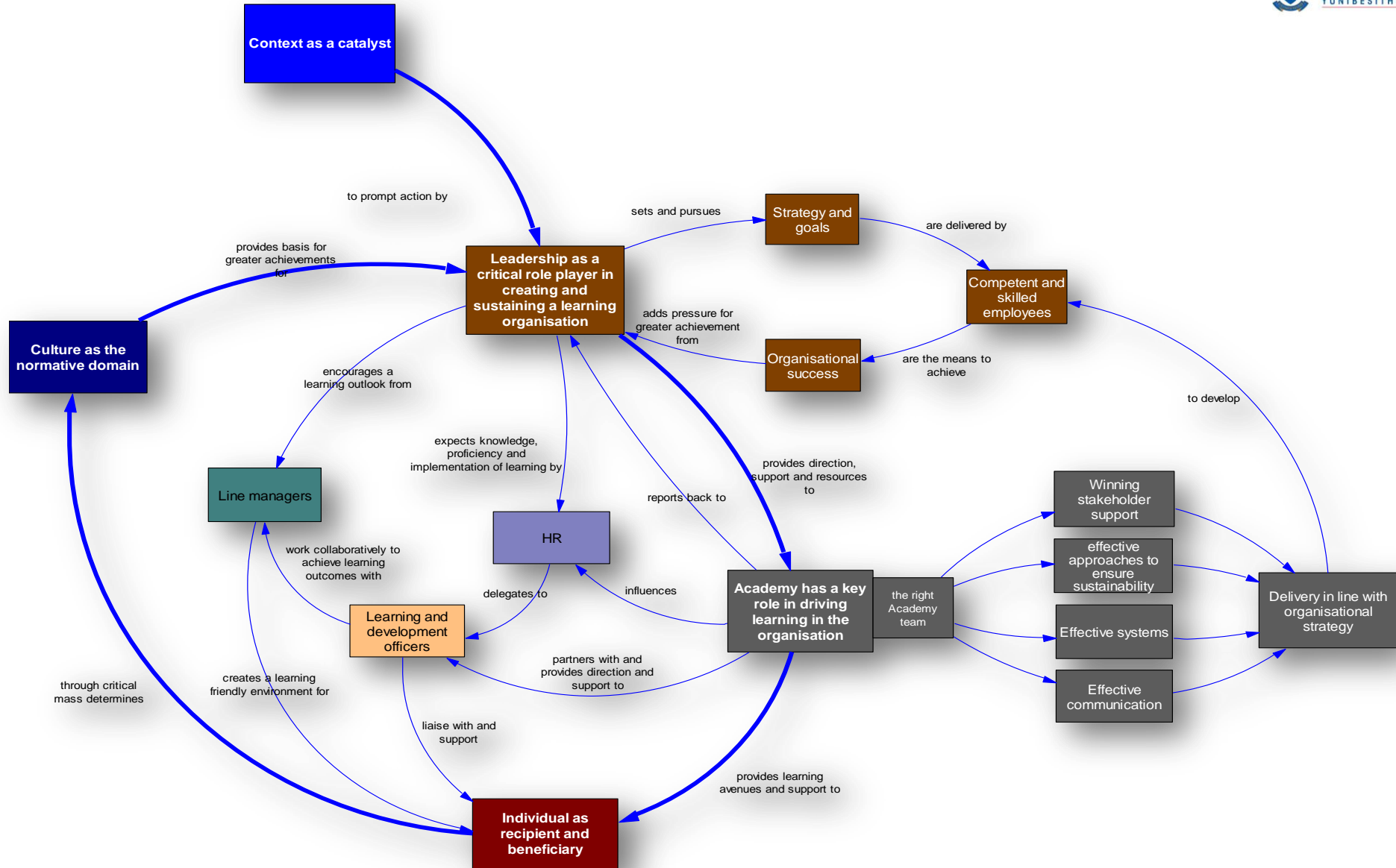
Figure 17:   Complex web of relationships

Each of the case study chapters is concluded with *'researcher's reflexivity points'* (in blocked out sections) which highlight the visibility of my status as a complete member researcher, and give me an opportunity to provide direct feedback into the narrative.

The case study approach employed in the research relied on interviews, the review of archival documents and personal observation from a complete member researcher perspective (Anderson 2006:378). This approach to data collection yielded rich detailed information in respect of the research question:

> • What is the role of organisational behaviour (at all three levels, individual, group and organisational) in establishing a corporate university?

The analysis of the data suggested that a number of different factors, role players and levels of behaviour influenced the establishment of the corporate academy.

In summary, as indicated in the diagram in Figure 17, it was discovered that an acute skills shortage in a period of global and local growth strongly influenced organisational leadership to implement a structured approach to people development with the direct intention of increasing individual competence. Individuals who were exposed to content-rich, just-in-time and appropriate learning were found collectively to have an impact on the workplace and the work environment by encouraging a more learning-oriented focus. Supportive leadership in turn looked to the Academy team to provide further learning avenues to meet additional needs. Role players in this process included line managers, human resources professionals and learning and development practitioners.

As the framework emerged during the data analysis phase, it became clear that the various elements were linked to the three levels of organisational behaviour. The diagram below (Figure 18) shows the organisational behaviour levels superimposed on the web of relationships with all three levels being driven externally by the context or environment. These levels are discussed in more detail in Chapter 11.
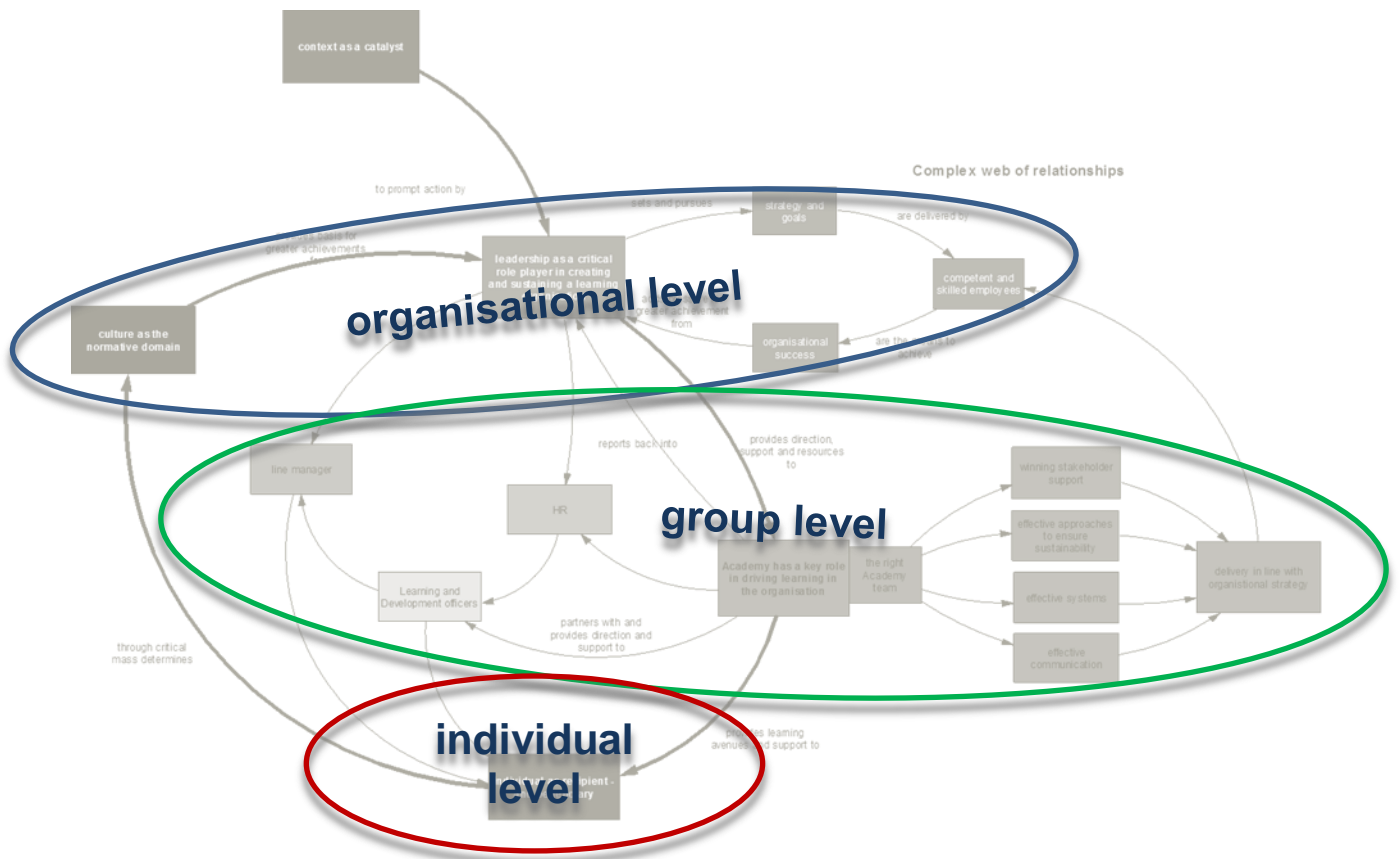
Figure 18:   OB levels in web of relationships

4.2   Conceptualising human capacity development

Corporate education should concentrate on closing gaps that have been uncovered between what the company wants to be able to do and what it can really do. Establishing the real gap related to knowledge, competence and skill is the first step towards taking a proactive approach to building capacity. This concept is depicted in the diagram below (Figure 19) where the sliding scale of *time* along the bottom indicates a constant pressure to be mindful of the learning that must take place *now* in order to achieve the future plans and strategies of the organisation over the longer term.
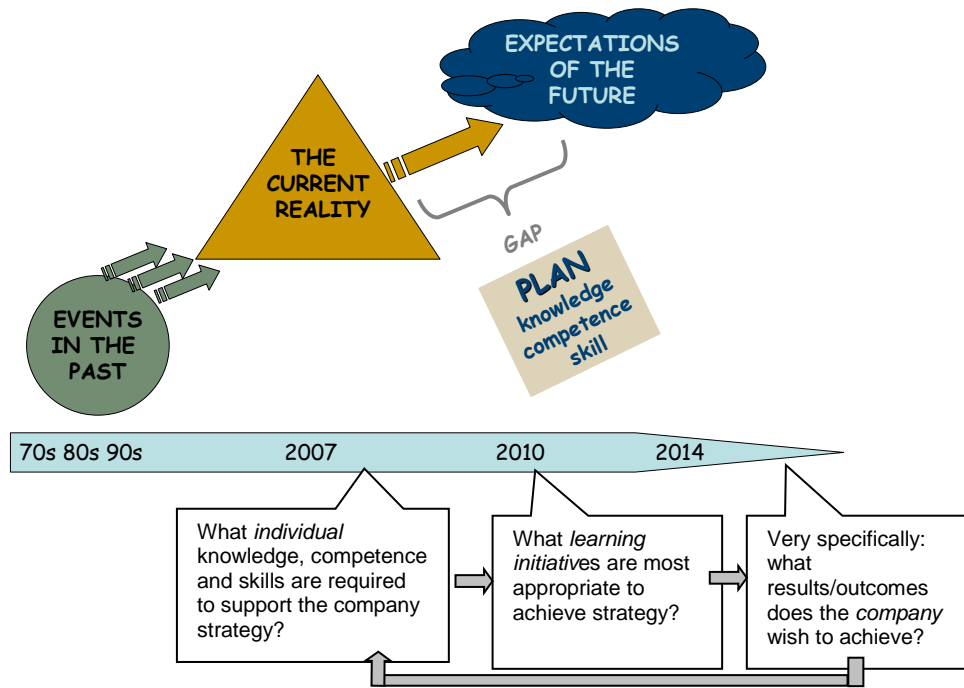
Figure 19:   Establishing the high-level plan for human capacity development

A corporate university is increasingly becoming a global vehicle for providing learning programmes to employees with the goal of developing and maintaining a highly skilled, knowledgeable and adaptable workforce that contributes to organisational growth (Andresen, 2007:110; Dealtry, 2001b:73; El Tannir, 2002:81; Prince & Stewart, 2002:808-809)

4.3   History and formation of the Academy

Leading up to the establishment of the Academy, the global shortage of the requisite skills and competencies in the organisation's areas of operations impacted on its ability to deliver in an increasingly buoyant market. The change behaviour over time diagram below is a mapping of *disparate variables* and shows the point the organisation was at in 2006 (Group Five Annual Reports 2002-2011. See Appendix A.).
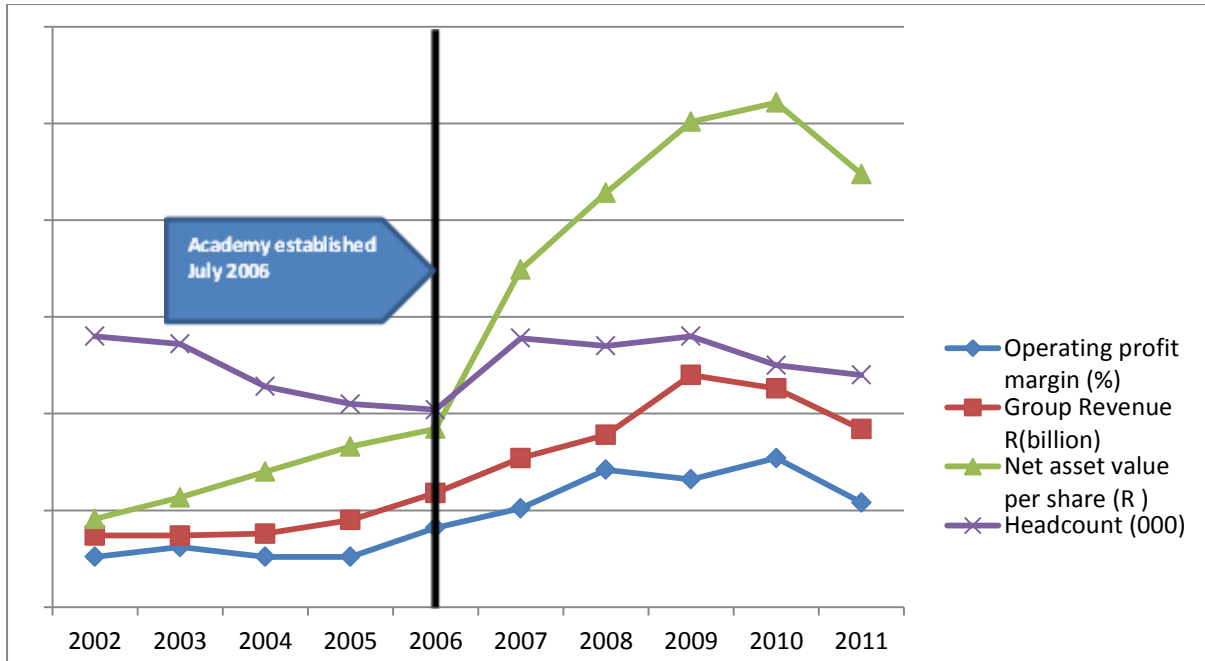
Figure 20: Diagram on change behaviour over time

As a measure to address the critical skills shortage in a focused manner and with a long-term vision, the Group launched the Group Five Academy in mid-2006 at the instigation of the board of directors and under the wing of the then CEO designate. Figure 20 above indicates that the introduction of a corporate university in the burgeoning construction sector was well timed.

The fundamental aim of the Group Five Academy was to develop a corporate university to build organisational and individual leadership and operational competency in management, construction and engineering capabilities appropriately aligned to company strategy. From the outset the Academy took responsibility for:

- Developing a consistent learning and development philosophy and approach
- Co-creating and communicating a central learning and development strategy (through consensus) that adds value to all business units
- Providing a common technology platform for tracking, delivering and reporting learning and development activities
- Agreeing on a core set of common metrics for all business units to track and report on learning and development done

- Setting standards, delivering on priority business-wide needs, developing curriculums and undertaking special projects jointly
- Entering into collaborative agreements with partner institutions

4.4 Growth of the Academy

The Academy grew rapidly over the five-year period and became the umbrella body for learning and development within the Group. Existing training infrastructure and capacity were absorbed into the Academy or aligned with it. Eleven full-time members of staff were recruited in the ensuing years, and close ties were built with L&D representatives at business unit level. Classroom facilities were established at head office as well as at a number of business units.

The growth of the Academy is indicated more broadly in the summary of expenditure and learning initiatives over the five year period as illustrated in summary below in Table 19.

Table 19: Summary of overall spend from July 2006 to June 2011
(Group Five, 2011)

Overall expenditure per category of spend

Categories – R'm	F2011	F2010	F2009	F2008	F2007
Skills development	6,9	3,9	3,6	3,7	3,1
Technical and professional competence development	11,7	8,9	8,5	10,5	6,4
Leadership and management development	3,5	2,6	4,2	2,2	2,6
Student management (bursaries)	6,6	6,0	9,3	6,8	6,5
Training support costs	9,2	10,1	12,2	n/a	n/a
Total	37,9	31,5	37,8	23,2	18,6

A total of R149 million was spent on training and development across the Group in the five years the Academy has been in place. In the same period, 52 898 training interventions took place, over R35 million was spent on bursaries for university studies and R19,2 million on learnerships.

Table 20:   Detail of spend and interventions (Group Five, 2011)

(Group Five, 2011)

Sustainability indicator	2011	2010	F2009	F2008	F2007
a) Annual value spent on training and development programmes – (R million)	37,9	31,5	37,8	23,2	18,6
i) Total number of training interventions*	17 234	14 941	8 933	5 780	6 010
ii) Total number of training interventions – semi-skilled and unskilled*	9 415	5 846	3 729	2 922	3 432
b) Annual value incurred on bursary expenditure – (R million)	6,6	6,0	9,3	6,8	6,5
i) Number of bursary students	183	171	258	178	149
ii) Number of female bursary students	43	40	55	27	37
c) Annual value spent on learnerships and apprenticeships – (R million)	4,9	3,9	3,6	3,7	3,1
i) Learners on learnership and apprenticeship programmes	201	214	231	175	161
ii) Unemployed learners registered on learnership and apprenticeship programmes	128	163	149	45	94
d) Number of students on the Group Five Programme in Management Development (PMD)	20	23	25	17	20
e) Total annual training spend – black employees – (R million)	18,1	14,7	20,2	14,7	14,2

* For employees.

The doubling in spend from the 2007 financial year (R18,6 million) to the 2011 financial year (R37,9 million) indicates that the Academy grew with the business (refer to Table 20). This would not have been possible unless a clear benefit and delivery had been indicated in line with the strategy of the organisation, and unless the Academy had contributed to the successful completion of construction projects by providing competent and skilled employees. This feedback is indicated in the case study in interviews with senior organisational leaders.

4.4.1   Leadership and management development – facts and figures

A great deal of organising and careful budgeting was required to roll out the volume and variety of programmes offered. Some details of leadership and management development spend are indicated below in Table 21.

Table 21:   Details of leadership and management spend

(Group Five, 2011)

	F2011	F2010	F2009	F2008	F2007
Total annual spend – R'm	3,5	2,6	4,2	2,2	2,6
Number of students on Programme in Management Development	20	23	25	17	n/a
Number of students on Building Business Basics (G5B3) Programme	97	150	99	n/a	n/a
Number of competence building workshops	62	50	87	44	81

The programmes indicated above are based on a central philosophy of work-based learning underpinned by systems thinking. The implication is that implementation of learning is integral to the learning process in order to achieve sustainable embedded changes in behaviour. This requires support from the workplace to achieve the best outcomes – and the role of leadership is to provide this support. Indications of the extent of this support are reflected in the interview responses which form part of the case study.

4.4.2 Technical and professional competence development – facts and figures

Table 22 below shows a summary of the expenditure on technical competence development, that totalled to more than R46 million over five years.

Table 22: **Details of technical and professional competence development spend**
(Group Five, 2011)

Technical and professional competence development spend

	F2011	F2010	F2009	F2008	F2007
Total annual spend – R'm	11,7	8,9	8,5	10,5	6,4
Number of students on Programme for Project Management	48	44	56	22	19
Number of students on Graduate Engineer Development Programme	89	52	37	n/a	n/a
Number of students on ODETDP*	0	16	n/a	n/a	n/a
Short technical workshop attendance	16 365	9 314	8 776	4 047	6010

* ODETDP is a qualification for the group's learning and development employees at business units and at The Academy. This programme is offered every second year.

The duration of the programmes and initiatives noted above vary from one day to a year or longer. Programmes and initiatives like these require commitment from leadership to ensure that time and support are provided for learners. One of the roles the Academy plays is to ensure that central systems are able to provide easy access to information. An example is noted below in Table 23 which gives demographic details of learners on the technical and professional skills development programmes

Table 23: Details of demographics of technical and professional development learners

(Group Five, 2011)

Demographics of technical and professional competence development learners

Skills programmes	Black F2011		Black F2010		Black Total F2011	Black Total F2010	White F2011		White F2010		White Total F2011	White Total F2010	Total F2011	Total F2010
	F	M	F	M			F	M	F	M				
Programme for Project Management	4	23	3	20	27	23	4	17	7	14	21	21	48	44
Graduate Engineer Development Programme	5	35	1	24	40	25	1	48	–	27	49	27	89	52
ODETDP*	–	–	10	1	–	11	–	–	5	–	–	5	–	16
Short technical workshops	2 765	10 255	1 428	5 220	13 020	6 648	910	2 435	691	1 975	3 345	2 666	16 365	9 314
Total	2 774	10 313	1 442	5 265	13 087	6 707	915	2 500	703	2 016	3 415	2 719	16 502	9 426

4.4.3 Organisational challenges in a South African environment

The South African context is unique as far as its dichotomies are concerned: on the one hand it has the 18th largest stock exchange in the world, a world-class constitution and a well-managed financial and tax system; on the other hand it struggles with widespread poverty, unemployment, outdated infrastructure and looming power and water crises.

To succeed in this environment – or perhaps just to survive in the tough times – requires resilience, flexibility and business know-how as fundamentals in the leadership competency skills set. To establish a corporate university in an industry that is pragmatic and operationally focused required courage and foresight by the leadership team.

Group Five challenges

Challenges in an organisation of more than 10 000 employees are numerous. In 2006 Group Five was growing and needed consistent and improved skills to meet growth requirements. The company also needed to align processes and find a way to raise the bar to facilitate a smooth growth trajectory. Cost-based drivers that would impact on margin had to be considered, such as; productivity, quality (poor quality that required reworking); supervision (poor supervision that resulted in a long tail of rework); delays in the final completion of the project; and leadership renewal

(renewal that is needed after a sector has been in the doldrums for a long period) to catalyse the business into new energetic growth.

Siloed leadership within the different business units was impacting on organisational leadership capability and was leading to inconsistent approaches and business practices that were in turn leading to further inefficiencies and uncoordinated and fragmented ways of doing business.

In order to sustain growth and keep abreast of or ahead of competitors, new approaches were required as regards innovation, ways of doing things, positioning (Green Star rating, BEE rating and branding) and communication (BEST company to work for, awards from the JSE, internal 'climate' survey).

Whilst the Academy was not intended as a panacea for all the organisation's challenges, there was certainly clear potential for leadership and technical development to demonstrate benefits.

4.5   Key measures of organisational success

Organisational success in the construction industry can be measured in a number of ways, three of which are discussed below. The first is *cash flow,* which indicates the actual health of the organisation's position; the second is *margins,* which reflect the quality and productivity achieved on a project; and a third measure of success is the successful expansion of markets.

4.5.1   Success measure: cash flow

Managing cash conservatively and working hard work to generate and 'fetch' money due have worked in the Group's favour. The graph below (Table 24) shows the company's growth in cash flow.

Table 24: Improved cash flow over 10 years

(Group Five Annual Report Audited Group Results Presentation, 2011)
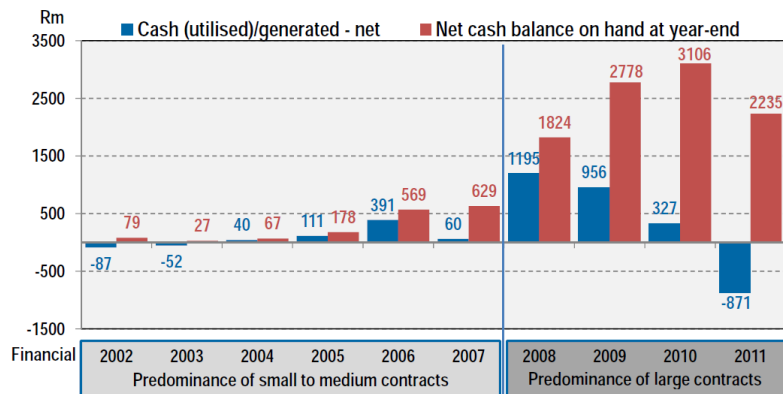
4.5.2 Success measure: margins

Margins in the construction industry can vary but they usually average at 5% or lower. A number of factors can affect margins, from weather through to strict control of construction variations while the project is underway. In the last few years the organisation has focused on firstly managing liquidity and secondly on reducing losses on projects. Good progress has been made in this area – and much of what the Academy does feeds directly into this goal, for example programmes focusing on technical skills, like project management and contract law, through to programmes on leadership and management.

Table 25 below gives an indication of the financial history of the organisation in terms of both revenue and operating margins.

Table 25: Ten-year review of revenue and margins

(Group Five, 2011)

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA
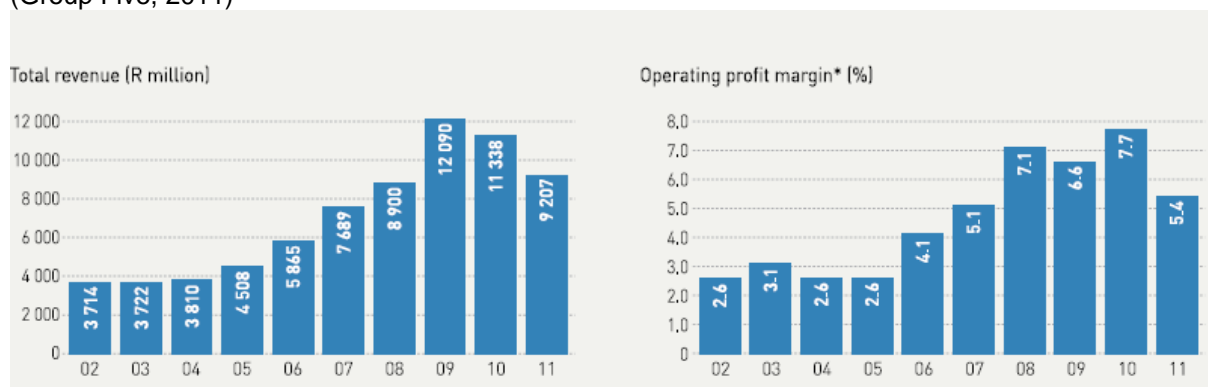
4.5.3 Success measure: successful expansion of markets

Group Five has developed its competence and capability to exploit the rapidly expanding opportunities in Africa, as well as to take on large multidisciplinary projects in South Africa. The diversity and extent of projects are indicated in some examples below (Figure 21).

Africa outlook – examples of projects
- Completed projects (last 3 years)

DRC	- Tenke Fungurume	Mining
Nigeria	- IBOM	Power
SA	- Sasol OCGT	Power
	- Berg River dam	Water
	- Brandvlei prison	Real estate
	- Netcare Hospital	PPP
	- Moses Mabhida	Real estate
	- GFIP & King Shaka	Transport
Mozambique	- Matola cement plant	Industrial
Angola	- Cimangola mill	Industrial
Malawi	- Kyalakera uranium	Mining

- Current projects

SA	- Transnet NMPP Project	Oil & gas
	- Kusile Civils	Power
	- Beatrix Mine	Power
	- Sasol Alrode tanks	Industrial
	- Sasol HRSG	Power
	- Spring Grove dam	Water
	- Khayelitsha hospital	Real estate
Nigeria	- ABA power station	Power
	- Asaba development	Real estate
Zimbabwe	- Road network upgrade	Transport
Ghana	- Ayanfuri gold	Mining
	- Commercial offices	Real estate
Tanzania	- North Mara Gold	Mining
DRC	- Kinsevere cobalt	Mining
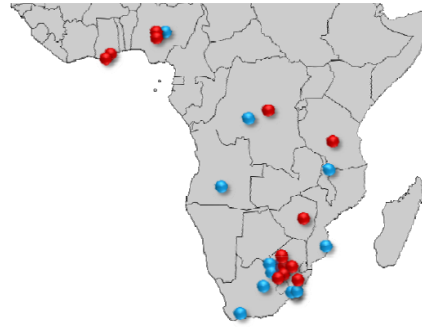
Figure 21:   Geographic spread of projects

(Group Five Audited Group Results Presentation, 2011)

4.6 Sustainable growth through individual contribution

Sustainable growth can only be achieved through an organisation's people – people who are empowered with know-how and skills and form a value chain of competence to promote competitiveness.   Individual competencies need to be constantly redefined to ensure that daily actions are integrated into organisational capabilities to deliver on strategic promises.

Organisational excellence is driven by the capacity and ability of individual employees to continually learn and improvise, to review practices for intrinsic value

and effectiveness, and to strive towards improved levels of performance. In summary, the Academy's mission is to promote and support the development of individuals –

- to achieve organisational goals;
- to meet organisational capacity needs; and
- to drive organisational competitive advantage.

The leadership of Group Five realised that it needed more than just a portfolio of learning programmes, and that, through careful planning and considerable input from the company in terms of time and commitment of senior employees, a whole lot more could be done to fast track a new generation of leaders into the higher echelons.

4.7   Conclusion to the chapter

In this chapter the history of the Academy was described to provide a backdrop to the next five chapters which comprise the actual detail of how the Academy unfolded from an organisational behaviour perspective, based on extracts from interviews and archival records and documents. The 'story' is guided by the various elements of the diagram as depicted in Figure17: Complex web of relationships. Each element and its relationship to other elements are described in detail in the chapters that follow. In Chapter 11 an integration of the case study discussion and the literature studied encapsulates the outputs of the research. A set of propositions is presented in the Chapter 12 of this thesis.

> Note: In the chapters that follow, extracts of data gathered in interviews are recounted verbatim (*shaded blocks*) to 'tell the story' in a number of 'voices', and, in addition, many points are illustrated by 'practice notes' (*un-shaded blocks*) to indicate actual practice in the workplace. These practice notes are extracted from desk-top research of meeting minutes, reports, and so forth. Details on accessing these documents can be found in Appendix A, paragraphs 3 and 4.

Researcher's reflexivity points:

I was employed by Group Five as Head of Academy in July 2006 based on my background in corporate education and proven ability to establish a successful start-up organisation. A brief synopsis of my CV at the time was as follows:

Janet has a broad spectrum of experience in design, development and implementation of work-based learning processes contributing to and integrating ultimately into supporting the achievement of organisational strategy. She has been involved in a cross-section of industries including retail, insurance, mining and manufacturing. Learning levels included from junior through to director level.

Programme design, with action-learning assessment components, is the key aspect of expertise, along with the customised implementation into organisations in a manner that delivers measurable results.

Janet was Operations Director for Adcorp Leadership School, after which she founded the Kagiso Business Institute and held the position of Managing Director.

Projects during this period included:
➢ Co-design of an entry-level action-learning programme for Woolworths supervisors – and directing implementation countrywide for four years
➢ Design and implementation of director programmes at IDC
➢ Design of talent development programme for Rand Water
➢ Design and implementation of Lean Five S programme at middle and junior management level at UTi Sun Couriers
➢ Design and implementation of ISO and HACCP programmes for Namibian multinational fishing company (ISO programme ratified by SAATCA)
➢ Design and implementation of a supervisory programme for Novanam, a Namibian multinational fishing company, and a programme aligned to allow admission into the Polytechnic of Namibia for successful individuals previously denied access due to academic limitations

Education: BA (UNISA), Executive MBA (UCT)

5 THEME 1: THE ROLE OF ORGANISATIONAL CONTEXT IN PROMPTING A STRUCTURED APPROACH TO LEARNING AND DEVELOPMENT

5.1 Introduction to the first case study element: context as a catalyst

This chapter is the first of six chapters that report on the findings as summarised earlier in Figure 17: Complex web of relationships (p. 99). This chapter addresses the trigger point which catalysed the initial thinking by the leadership of Group Five. Prompted by challenges in the *South African and global context*, senior executives of the organisation conceptualised a possible solution in the form of a learning academy. The evidence gathered to support the presentation of this case study element as the initiator for change is presented in this chapter, and a visual depiction is provided below (Figure 22), with emphasis on the element to be presented.
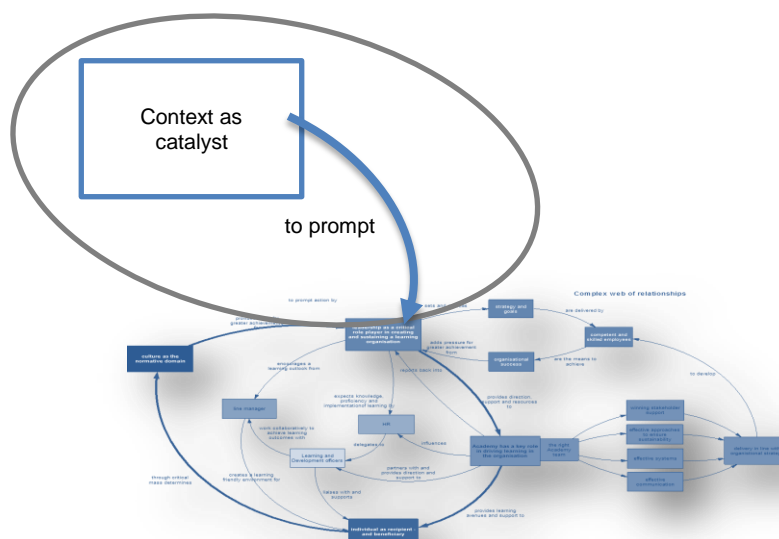
Figure 22: Context as a catalyst

5.2 External environment as a catalyst

The South African economy leading up to 2006 indicated the beginnings of a super cycle for the construction industry but this came with some concerns – as expressed by the Group Five CEO in his overview of the 2006 Annual Report (Group Five, 2006:31):

> As growth prospects in local and strategic over-border markets have reached levels unseen for more than a decade, the most daunting challenge facing the group is the ability to secure experienced engineering competence and skilled resources to undertake the work.

Similar concerns were expressed at a government level by South African Deputy President Phumzile Mlambo-Ngcuka at the launch of the Joint Initiative on Priority Skills Acquisition (JIPSA) on 27 March 2006 when she noted that, "Nothing short of a skills revolution by a nation united will extricate us from the crisis we face" (Mlambo-Ngcuka 2006)   The government's answer to the challenge was JIPSA – a high-level initiative led by the Deputy President and comprising the goal of identifying solutions to skills shortages in critical areas over a three-year period.   JIPSA role players included government, labour and business that were given the task of resolving blockages and fast tracking skills delivery in critical areas.

Some reflections on that period by Group Five senior executives during interviews:

- the skills needed

The CEO … was seeing the growth opportunity in this sector ... and the intent was then to make sure that ... we could build the skills needed to take the organisation to a new level.

- lack of technical skills

We were just starting to see the real beginnings of the super cycle and understanding there was going to be huge skills shortages.

Shortly after I joined Group Five, an executive director gave me a book by Allyson Lawless and advised me to read it as it provided detailed research on the dilemma

faced by the sector and the skills challenges faced by the civil engineering industry in South Africa. The following comment in the book set out this dilemma as follows:

> There has been a slow decline in the number of civil engineering professionals (engineers, technologists and technicians) since the infrastructure development heydays of the sixties and seventies. Reduced industry demand, reduced numbers of graduations, emigration, low rewards and engineering graduates being highly sought after by other economic sectors have meant that personnel have left the market at a higher rate than those entering through tertiary institutions and immigration.
>
> Lawless (2005:3)

A point in the text had been highlighted by one of the directors and it concerned the important role that engineering competence played in job creation:

> The construction industry employs some 400 000 people ... the ratio of civil engineers and technologists to the workforce is roughly 1:60. For every civil engineer or technologist who leaves the industry, ultimately 60 jobs are lost.
>
> Government has identified job creation in the construction industry as one of the saviours of the economy. But as long as the bleeding of civil engineering skills is allowed to continue, jobs will be lost. The opposite is also true.
>
> Lawless (2005:11)

The points below, which were discussed at subsequent deliberations when establishing the direction and intent of the Group Five Academy, pertained to the far-reaching consequences of a failure to act on the skills crisis in the sector as set out by Lawless (2005:14):

- Delivery will not be possible and poverty will be endemic in South Africa.
- If adequate water and sanitation infrastructure services are not supplied, waterborne diseases will reach epidemic proportions.
- An increase in transportation gridlock and congestion in ports will hamper trade.
- Political instability will occur, because the growth rate of 6% and job creation will not be achievable.
- Engineering will become a career of last choice for adequately qualified matriculants.

- Continual loss of skilled capacity through early retirement, emigration, and moving to other sectors will require South Africa to become a net importer of engineering skills to the detriment of the rand, investor confidence, the economy and the infrastructure since local knowledge and understanding are imperative in civil engineering.

5.2.1   Pipeline of younger skills in the global scramble for skills

As the consequences of the global and local skills shortage began to become clear, so did the complexities of the situation and the possible implications.

Reflections from senior management in the interviews:

- no pipeline of younger skills

... there was an hourglass problem in the industry – there were a fair number of [older] people that had stuck out the industry through thick and thin, they had their 20 years' experience and the knowledge and experience to run with the industry, but there was a significant shortfall of skills below that.

- tertiary education falling short

… and a learning culture is something that one needs to enhance in the business and especially in South Africa. ... There has been a lot missed out on education. ... The education that comes from our tertiary education facilities nowadays is not the way it was.

5.3   Internal Group Five context as catalyst

In addition to the challenges in the wider South African context, the organisation was experiencing other challenges internally.

Some of these challenges as verbalised by senior management in interview responses:

- lack of management and leadership skills

… in addition there was a need for management and leadership skills.

... there was a skills shortage within the industry – there was a skills shortage with regard to skilled, semi-skilled, as well as management ....

- training was ad hoc and reactive

... what we had is ad hoc training – not properly planned – service providers that just used to hang around in the system for ages and that would have been the reason for using them .... I don't think ... the training was directed at future competency, it was reactive ....

- employee retention was a challenge

… job satisfaction was quite low and that there was quite a high turnover.

- authoritarian culture

Group Five had come quite a long way from its roots but it had, I think, got sort of stuck a bit in terms of its culture. It was ... very much a performance-, individual-orientated culture and quite a harsh-command and controlled environment.
... an organisation at the time that was obviously pretty culturally barren ....

- fragmented internal structures

We [BU] are different, we have different challenges to deal with, different cultures. In our BU we have a specific philosophy that the knowledge and skills should reside in the business units and we master and map our own destiny. We are in the final analysis, ultimately accountable to secure the turnover and put the profits on the table.

5.4   A new 'people strategy' for the super cycle

Internal and external pressures provided the catalyst to the consideration of an internal structure to manage people development. The need to build internal capacity to execute bigger jobs and also the need to align Group-wide behaviour across scattered business units were recognised by senior leadership.

Reflections by executives on establishing the way forward:

- execution through skilled employees

... but at the end of the day the key driver was, how do we stop losing money on the jobs we tender for? ... Then it was a situation of, now we've got these key people that we want, both core and non-core and now how do we bring them up to a level or standard that they have the authority and the responsibility to be able to execute and be properly prepared for what their job is? That's the first aspect. The second aspect is, how do we develop people right from the beginning – right through to growth within the organisation. I don't think there was a lot of strong middle management and senior management – and it was how to pump up that middle and senior management to be more skilled.

- alignment of Group-wide approaches to systems

The second was around actual behaviours and I think this had been driven more so by the CFO at that time – the behaviours of what we wanted to do. There was a discussion at the time in Group Five called the Group Five Way, and the Academy had played a key role in ensuring that the Group Five Way was uniformly rolled out, communicated, trained and developed on that to achieve those behaviours.

5.5   Steps toward a learning organisation

The realisation that, in order to compete at new levels and take advantage of the opportunities in a favourable economic cycle, the people aspect of the business would need to become a key focus area.

Insight by the CEO on looking back:

So we weren't a learning organisation, and you can see that from the type of work we did and where we'd come in a strategic process. We hadn't come very far along a road. All the visions were there. The wherewithal … which was the people ... was missing.

So I took it upon myself to be part of that action to really look at training and development of people, and then it became more of a passion actually. And I think certainly the fact that I was able to implement that with a mandate, and then I became commissioned to make sure it actually did happen. ... but it was borne out by the need to do something in terms of building capacity and retention of skills.

5.6 Conclusion

The pressing realisation that the organisation could not deliver on projects without the requisite technical and leadership skills, catapulted senior management into lateral thinking as to how this problem could best be addressed. No short-term solutions were available but the concept of an in-house learning centre was advocated and accepted as a possible solution. This thinking was catalysed by the pressures to grow the business and therefore grow profits within the rapidly burgeoning economy and the proliferation of construction tenders.

Based on needs, both externally and internally, the Group Five Academy was established in July 2006. The initial focus was on leadership development at a senior level, as well as on addressing some of the challenges discussed regarding a co-ordinated approach that supported the strategy and goals of the organisation. The super cycle did materialise, followed by the preparations for the 2010 World Cup. The journey taken in the ensuing five years is discussed in the following chapters, starting with the role that leadership played and moving onto the unfolding of the Academy in the organisation.

Researcher's reflexivity points:

My input into the direction the Academy took

In the planning stages, the scope of the Academy was envisaged by senior leadership to be a team of three to four people, including an administrator, material designers and myself as Head of Academy. Due to the wide latitude provided I was able to not only rethink the staffing specifications but also the direction the Academy took. I met quarterly with the 'governing body' comprising five directors, including the incoming CEO, to discuss progress, finances and business needs. I was able to provide proposals and innovative solutions to business challenges, and over a period of 12 months built up a level of trust built on a history of delivery to meet both business needs and the commitments I had made up front.

Fast tracking my insight into the business and catalysing my thinking

A key success factor was the prompting by the governing body to launch the Academy with the commencement of a leadership programme to fast track key talent into leadership or director positions. This enabled me to network with individuals across all business units, gain insight into the business, learning needs and areas of challenge faced by the business, and to establish a network of influential business leaders. By reading all their assignments (strategy, finance, operations, project management, communication and marketing), I very quickly gained an understanding of the business.

Challenges in the early days

Setting up an Academy for an organisation of over 10 000 employees, the majority being based on site in far-flung locations all over Africa, was somewhat daunting. As the business was in a major upswing, resources were limited and I had very little by way of day-to-day support from management. For the first six months I had great difficulty in getting traction. I felt as though there was a "wait-and-see" attitude from most in senior management. The key Academy supporter was the incoming CEO, and he was facing his own transitioning challenges.

Context as a catalyst – the dark horse

My focus, when these studies commenced, was on OB levels and particularly on the *Academy* and the role that *leadership* played. The theme of 'context' emerged from the data as somewhat of a surprise, particularly since it was at a prominent and dominant level. Due to the systemic nature of the thinking underpinning this study, the catalysing effect of the external environment made sense since, at all levels in the organisation, the nature of the context evokes responses in people and affects attitudes. For example, the response from the incoming CEO was that it was his mission to implement a CU as it was something he was 'passionate' about, and the MDs expressed strong commitment to learning]. The external environment seemed to compel a stronger response, and act as a wake-up call to prompt a response.

6   THEME 2: LEADERSHIP AS A CRITICAL ROLE PLAYER IN CREATING AND SUSTAINING A LEARNING ORGANISATION

6.1   Introduction to the second theme: the role of leadership behaviour

This chapter looks at the role played by leadership in initiating a learning organisation. The evidence gathered to support the presentation of this element of *leadership as a critical role player* is presented and structured around the visual depiction as provided below (Figure 23) indicating the emphasis on the elements discussed in this chapter.
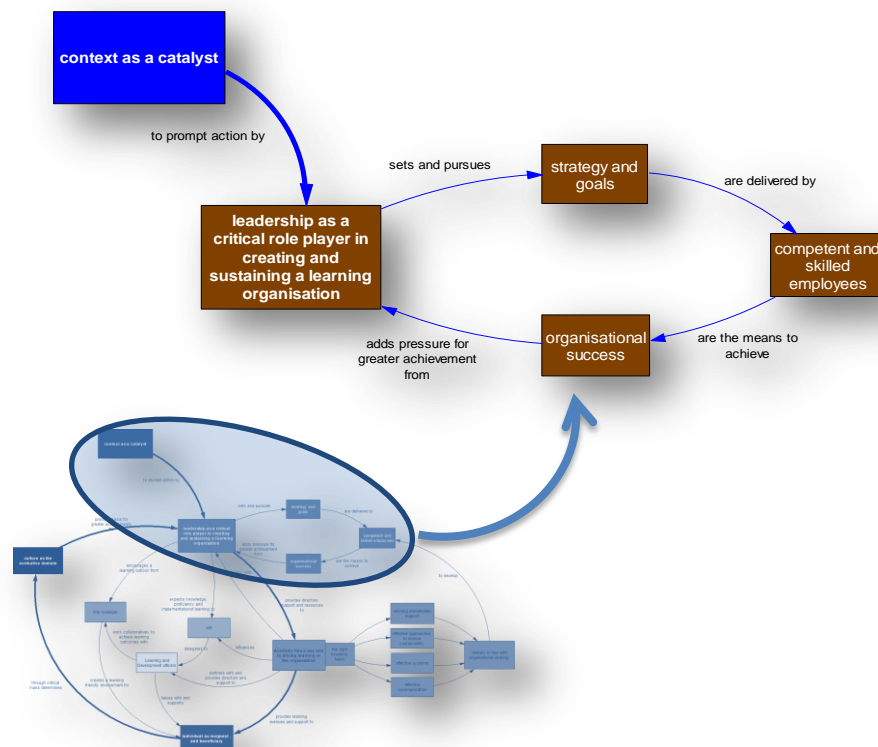
Figure 23:   Leadership as a critical role player

6.2 Leadership prompted to action by opportunities for growth

The biggest challenge facing leadership in 2005 and going into 2006 was the rapidly expanding horizon of opportunities in a sector that had been in the doldrums for decades resulting in a much reduced pool of expertise. The construction industry is renowned for clearly defined delivery schedules, with penalties for any delays and with very stringent quality requirements. The 'boom' in business needed to be supported by specific technical skills (such as those of engineers and artisans), and underpinned by good leadership and management skills in order to keep within schedules and budgets. A regional and global shortage in skills meant that the organisation could *only grow in line with skills available*.

For senior management the question was how to secure the required expertise to deliver on the construction projects, and then how to retain it within the organisation going forward. From this came the notion of an in-house resource to build skill with a focus on lifelong learning which would then also act as a retention strategy.

As reflected in Figure 23, data gathered indicate that leadership sets and pursues strategy and goals which in turn are delivered on by competent and skilled employees. Employees are the means to achieve organisational success. This success raises the bar and adds pressure for leadership to achieve greater things.

Leadership, therefore, plays a key role as the interface with the external environment, guiding the organisation to achieve success through people. Development of people is a critical aspect of competitive advantage; however, leadership needs to have a learning mind-set and believe in the value of learning and development.

6.3 Leadership to support learning as a critical success factor

The support of all leadership – starting at the most senior levels and moving downwards throughout the organisation – is the most critical of all success factors in

building a sustainable learning organisation. Recognition of the importance of the role played by the CEO, Executive Committee and managing directors in supporting learning is widespread within Group Five.

> Comment by an Executive Committee member in an interview:
>
> - the critical success factor
>
> *I think the critical success factor is that you had to have someone that was championing it – who was [the CEO] at the time.*

The concept of 'support' can, however, be a vague notion, and there can be degrees of energy and determination to see the project through to implementation and comprehensive establishment in the organisation. 'Support' begins with a vision but requires long-term commitment to 'champion' the process.

6.3.1 A learning organisation needs vision and a champion

For the establishment of a corporate university to take place, some rationale must be in place. Is its purpose related to research and development, transformation, skills development, product sales or a major change initiative? Whatever the focus is, there must be a convincing vision, and, if possible, the CEO must be the visible champion of learning.

> Thoughts of senior Executive Committee (exco) member and Managing Director (MD) on critical success factors:
>
> - success building on success
>
> *I think, in the early years, if it wasn't the initiative taken by, I suppose, one senior person and the executive that had the energy to drive it, it wouldn't have happened. So I think with anything, if it's got to be a success, you have got to have somebody who is passionate at the start to actually drive it, that actually believes that it's going to work – because without that I can assure you in a construction business it wouldn't have even got out of the starting blocks. I think all credit to [the CEO] who actually did pursue it, and then what happens, it tends to gain momentum and ... again, once it's proven it becomes easier. And once you see the success, yes, it tends to get a lot more support.*

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- persistent message by leadership – an investment in the future

What did affect the eventual success of the Academy was the persistent message by the leadership that this is here to stay and it is an investment in our future. I also think that there were one or two business units that recognised the benefits and started communicating it.

As indicated in the extracts above, 'energy' and a 'passion' for learning drove the initiation of a corporate academy in the organisation. In a clear request for support from the outset, a meeting of the CEO and the Head of the Academy was held in June 2007 to discuss specific needs with respect to the anticipated role of leadership in involvement with and support of the Academy going forward.

A broad outline of areas of support included:

CEO role:
- Generally champion learning in the Academy – and include in road shows and communications.
- Communicate the detailed strategy of the Group to the Academy – particularly where the Academy can act in a support function.
- Change mind-sets at higher levels regarding the prioritisation of learning initiatives and moving towards being a 'best company to work for' to facilitate the retention of people and development of the talent we have.
- Be at the launches, graduations, ad hoc guest speaker opportunities and where possible join the groups informally.

(Miscellaneous Meeting notes 12 June 2007

The support of senior management and, in particular, the CEO is important to promote a learning culture. Where actual engagement takes place, the value derived by the organisation increases exponentially. This supporting role was taken up by all the members of the Executive Committee, with the CEO being the main initial initiator.

Many instances of this support were experienced:

Big thanks to our CEO who spent time with the delegates on the evening of the 12th November 2008 and engaged in a question-and-answer session with them.

(Board Report November 2008)

More formal initiatives were undertaken, with the Executive Committee playing an active facilitation role:

> At a group level, the orientation programme highlights Group Five's vision and values to new employees and provides a firm foundation to understanding the Group Five Way.
>
> (Board Report FY 06/07)

A normative environment is based on culture which is created by structure, policies and values. These values must be actual values rather than espoused values. The Group Five induction, which is held for new recruits at a corporate level and is facilitated by the Executive Committee, entrenches the Group's beliefs and reminds all of the importance of communicating these values continuously. New employees take cognisance of the importance of the vision and values because the Executive Committee has taken the time out to talk about them.

In summary, as noted by an HR director in an interview:

- leadership behaviour

You can have the best facilities, you can have the best course material, you can have all the easy stuff, but unless you have got leadership commitment, leadership displaying its interest and leadership committed, the Academy will never work.

- CEO support

What you have to have is the CEO's undying commitment. ... having the CEO ... funnily enough the CEO, not any other member of the exco, it's the CEO that you need in this organisation.

Although this support for establishing a learning academy is imperative in the planning and roll-out stages, consistent support in the future is even more important to sustain a learning focus in the organisation.

6.3.2   Consistent visible support from the most senior levels

Support from the CEO and senior management is critical but it needs to be constantly reinforced, particularly in a big organisation with a diverse portfolio.

> Comment from a business unit contracts director:
>
> - continuity of support in the face of opposition
>
> *So I think the reason why it's* [the Academy] *been very successful is because there has been continuity in the support. There has been one man* [CEO] *that has been driving it from day one, and you know as well as I do that there were internal debates.*

Backing from the CEO is important but at a business unit level the visible support of the MD is important as well.

> Insight from two MDs during interviews:
>
> - the right starting point
>
> *Do you expect the Academy to get down to the rest of the businesses or do you expect the leadership of the businesses to promote the Academy? I think you have got to get buy-in from the senior management and they have got to actually promote the Academy.*
>
> - getting learning onto the management agenda
>
> *So we have tried to make it* [the Academy] *visible and I think it's on everybody's management agenda. So it's become a way of doing business compared to ... it was an instruction to support a business or an initiative. ... Leadership played the role of enforcing it, leadership now encourages the implementation and support of it, definitely.*

Visible support by top management is essential: such support, whether it is given through direct communication or through leading by example, sends a clear message to both learners and management that they must follow suit. This support is important, particularly for programmes linked to strategic initiatives.

Leading by example:

> [The CEO] confirmed to be at PMD launch.
> On Monday is the start of Building Business Basics … [the CEO] will be attending the launch.
> (Academy Operations Meeting Minutes 090109 and Academy Operations Meeting Minutes 160109

> For the launch of the PMD – the flagship leadership development programme with [a university], senior management were invited to (and attended) the launch cocktail party.
>
> (Summarised timetable, PMD 2006-7 JB notes: PMDtt 170806)

The impact of this is that students realise that senior management support the process and they are thus motivated to achieve good results. On the other hand, senior management become aware of who is on the programme and they take the opportunity to get to know the potential future leaders of the company.

The support of the Executive Committee and other senior management provides credibility and elevates the status of learning, thereby encouraging a culture of learning:

> The PMD group was exposed to some tough interviewing skills presented by [a well-known public personality], and then finally, Action Learning Project presentations took place during the afternoon of 22nd August 2008. The presentations were evaluated by a panel consisting of [CEO], [exco member], [exco member] and [university] representatives.
>
> (Board Report FY 08/09)

Where top management leads, others will follow. If an example is set, the speed to further roll out is faster and momentum is easier to achieve.

Senior leadership attend programmes:

> Situational Leadership has been identified as a key competence in Group Five's leadership development strategy. The programme is being rolled out to all middle and senior management levels, having begun with executive management leading the way.
>
> (Board Report July 2009)

Providing clear guidelines and establishing standards indicate the practical nature of top management support, which is beneficial in the linking of learning to strategic necessity.

In a very practical, direct and measured way, the support of and pressure from a person of influence in the particular context (in this case the Group HR Operations Director), while not taking away from the authority and autonomy of the different BUs, provide a counter point of view (and a gentle reminder of accountability).

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> Are BUs following up on their training plans? Are we under-delivering against what is already a constrained plan? How do we change that mind-set and process? [HR director] commitment [was given] to spend on each employee from their BU.
>
> (Steering Committee Meeting Minutes 160910)

Consistent public support provides a good basis for a learning environment, but the next step of actively making a contribution firmly roots learning priorities within an organisation.

6.3.3   Active contribution by management and leadership

Communicating support verbally or through actual attendance of programmes is further enhanced by the active contributions made by management and leadership to programmes that are being rolled out. These contributions are often in the form of introductory sessions or overviews to provide insights from practical experience or to share industry/organisational knowledge.

Insight by a business unit managing director:

- active contribution to learning by sharing knowledge and experience

A part of the success is involving manco and exco and other senior management personnel in the business to just go and talk to the classes. Give the odd keynote address or lecture … from a practical point of view. And I think that also exposes the students to the management and they get a better feel of the business and, conversely, management get to see the quality of the students actually on the courses.

Senior management also make an active and regular contribution by attending student presentations and listening and providing feedback to groups presenting their work, which result in a programme being more aligned to organisational needs with each iteration. The engagement also provides a clear indication to all present of what the current business issues are, what the organisational strategy is and what management expectations are of up-and-coming talent and future senior management.

Using expertise within the Group builds credibility and fast tracks learning through the use of business-specific examples and insights. It also provides a consistent approach to the way things are done in the organisation.

An example of how *senior executives and department heads contribute to learning* can be seen in corporate inductions which are held at the head office once every quarter. Attendees are newcomers of a certain grade and upwards and are from all the business units. The CEO, CFO and other board members are regular presenters. Presentations are revised and adjusted in collaboration with each of the contributors on a regular basis to ensure the most relevant and up-to-date information.

Group initiatives often have a learning and development aspect and key stakeholders request assistance with programme design, implementation and progress reporting. The stakeholders rally support for the programme, offer expertise or access to experts to assist with design and then play the role of 'champions' when the roll out commences. Examples of stakeholders include those from the safety, risk, communications and legal departments.

To locate ownership, the relevant subject matter expert (SME) 'leads' the project in the design phases and communicates and guides the implementation of the design. It is important to keep ownership and custodianship of the project or 'issue' fully located within the sphere of the 'champion', and the Academy provides the 'legs' and the project management aspects. This means that the Academy works together with business and can thus achieve a good deal more because the specialist champions overcome many challenges that would otherwise become the Academy's problem. Programme updates or flexibility of focus based on need is easier to achieve. These ensure on-going relevance, which is the cornerstone of adult learning.

6.3.4   Ownership of the Academy

An unexpected outcome of the establishment of the Academy was the sense of pride expressed by employees, along with the curiosity expressed by external people, including prospective employees. An anecdote related by the CFO is that a question

about the Academy is the second-most frequently asked question asked of her (the most frequent being her choice of the construction industry as a career for a woman).

> Insight by a member of the Academy:
>
> - employees talk about 'our' Academy
>
> [Management and leadership] *enjoy coming to graduations because it's … a nice side of what they do and it's something that they can be proud of. And I do think there is a sense of pride in the Academy because many times we've heard people talk about 'our Academy' .... So, there is a sense of ownership that I think people have, not only employees but certainly the senior leadership as well. They are very, very proud and they 'own' the Academy – it's theirs.*

Getting senior buy-in through providing platforms for communication and using a number of different approaches to communicate ensure a better coverage and the likelihood of raising organisational interest at the same time. Using a collaborative approach to decision making, although slow in the beginning, speeds up implementation.

When deciding on high-level programmes, senior management are part of the process:

> PMD – Service provider decision [presentation to HR]
> Summary of various service providers was presented in a pack – and the benefits of the various programmes were discussed in detail ... Unanimous agreement was for [a university]. Way forward is to be presented to Exco and Joint Opsco – to seek agreement.
> (Steering Committee Meeting Minutes 160910

> Recollection from an MD:
>
> - getting senior buy-in through providing platforms for communication
>
> *I remember that day, I think it was because you had now included the senior guys to be part ... to be able to comment and say what they wanted to say. Once you say what you have to say and it's listened to, you say, "Well hang on, I've actually bought into this". And that's possibly the reason why – it's how do you get the buy-in and hearing what the businesses have got to say. Not just go in and say, "This is what we think".*

6.3.5   The role of late adopters

In the early days of the establishment of the Academy, not all stakeholders showed a ready acceptance of and engagement with the concept or reality.

Comment by an Executive Committee member:

- a culture of delivery looks for evidence before engaging

I think when the Academy started initially, possibly there was some scepticism that this is not going to be around for a long time. Is the training going to be worthwhile?

Insight from a senior executive:

- winning trust through delivery

And that's because I think it demonstrates that if you deliver, you gain people's trust and it becomes much easier. The hard bit is up front.

In any endeavour there are always sceptics and they play a very valuable role in keeping a balance. The introduction of the Academy presented a conceptual challenge to a number of stakeholders who were very delivery oriented, and, given the complexities of the construction industry, they saw the practical hurdles that would need to be surmounted before any meaningful learning initiatives could be offered.

6.4   Strategy and goals

An important aspect of a corporate university's *raison d'etre* is to provide support for organisational strategy. The key reason for leadership support of the corporate university concept is the focus on current and future capability.
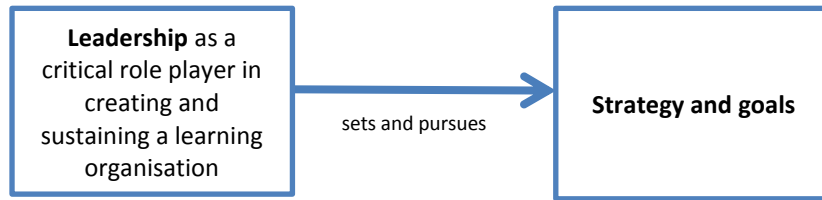
Figure 24:   Causal link of leadership to strategy and goals

In setting strategy, senior leadership is acutely aware of the need to deliver on goals and plans through people (Figure 24). Two different but related points that have emerged in relation to the Academy are:

- The Academy is able to support some strategies and goals.
- The Academy outputs support the strategy.

6.4.1   The link between the Academy and the organisation's strategies and goals

Retrospective views of the need for the Academy were based on different ideas of what the most prevalent driver was. The focus was mostly forward thinking.

Thoughts from an executive board member and two senior directors:

- main driver was building capacity to take the organisation into the future

The backdrop for the driver behind it was the fact that Group Five was seeing ... the growth opportunity in this sector over the next few years and the intent was then to make sure that … we could build the skills that we needed to take the organisation to a new level.

- reporting, management and control, and leadership development

... there were kind of three very distinct reasons. One was the need to ... report in terms of this ever-evolving and convoluted legislation of ours. This other side, there was a very strong need for leadership development. Ageing management teams … and then ... corporate needed … something to manage and control [training and development] *so you feel tangible, market brand – that was a need from corporate – it wasn't a shared need from businesses – or they didn't see it as such.*

- building knowledge base to meet strategic goals

You have got to bring people up to speed and keep them up to speed. If you don't do it, you are not going to get work or you are going to fall behind.

To gain credibility the Academy needs to understand the organisational strategy in its continuously changing manifestations and also needs to be able to *demonstrate clear business linkages to the benefits of learning*. In the longer term the Academy needs to play a strong role in *helping to build a learning culture*. These two points are discussed in the section below.

6.4.2 Demonstrate clear business benefits to gain Academy support

Support from business unit management is required to implement learning initiatives and to begin to create an environment which encourages learning. To gain this support, clear benefit must be communicated but always ensuring that benefits are 'under-promised and over-delivered'. From the discussion below it is clear that senior management was aware of the disarrayed and random approaches to training prior to the establishment of the Academy. However, there was not necessarily agreement on what the benefits would be.

An executive board member's reflections on anticipated business benefits:

- managing margin erosion and risk exposure

I think the real driver for Group Five, if I can recall, is the fact that – how do we make our profits profitable. And it revolved around a basis that we would have plenty of projects, plenty of people on projects, yet the margins of the projects during execution were eroded. And the driver was to stop the erosion of margins and loss makers and grow, you know, retain or improve those margins. So when we had that discussion quite a long time ago, we looked at a number of factors. The one issue with margin erosion revolves around risk. And, therefore, we had to step up our risk policies and our risk procedures and how we managed that. The second issue around the margin erosion revolves around systems and procedures and people executing the project.

- loss maker ratio

And if you look at our risk report you will see ... that Group Five's loss maker ratio has improved dramatically now. So what has stopped that rot? It's been stringent risk procedures and questions at the tender stage, number one. Number two, it is good Group Five Way systems, policies and procedures. And, number three is having the appropriate, educated people executing the projects on site. And I think that was one of the key drivers for the Academy. Yes, there was a skills shortage. Yes, we didn't have enough project managers but at the end of the day the key driver was, how do we stop losing money on the jobs we tender for. That's my opinion. Then it was a situation of, now

we've got these key people that we want, both core and non-core and now how do we bring them up to a level or standard that they have the authority and the responsibility to be able to execute and be properly prepared for what their job is. That's the first aspect. The second aspect is how do we develop people right from beginnings right through, to grow within the organisation? I don't think there was a lot of strong middle management and senior management and it was how to pump up that middle and senior management [levels] to be more skilled. And I think those are some of the key drivers in my mind of why we developed it really.

In order to achieve the outcomes suggested above it is necessary to have a very broad focus on possible solutions but also a very clear focus on what philosophy or methodology will achieve these outcomes.

Group Five has a number of business units and they are all geographically spread. This leads to a very fragmented approach to almost all aspects of business. Part of the role envisaged for the Academy at the outset was to assist with aligning approaches to training and then impacting on other areas of business also requiring alignment.

Executive board member feedback on challenges related to service providers for training:

- quality of service providers to meet our requirements

But I would also put it at a time when it was becoming difficult to ... I think two things; one, it was difficult to support training of people using external service providers and the other was that it was difficult to find quality service providers. So I think, a) there probably weren't enough of them, or they weren't offering exactly what we wanted or we don't think they did it well enough. And probably of the lot, I would say the most important reason was actually they weren't giving us what we were looking for. And I suppose you could say that we have particular requirements that are not necessarily ordinarily available. So I guess we tried various service providers, decided this wasn't quite what we were looking for, so maybe someone in-house could manage it better, arrange it better, co-ordinate better and then start to offer us a broader spectrum of courses.

To achieve the goal of alignment it did not make sense for courses and programmes to be generic. All programmes, from one-day workshops to programmes spanning

18 months, are all carefully scrutinised for content and approach. Once approved in principle, the process of customisation begins. This can take from three to twelve months depending on the levels of complexity.

> Response from a learning and development representative from a business unit:
>
> - designing learning around group strategies
>
> *I think also you are designing your training and development around the Group. So you are not fishing out there for a service provider to provide a service of sorts if you are aligning your training and development to your group strategies, then everything that the Academy has in place is aligned for your business.*

Once programme design is complete and roll out commences, feedback is gathered through evaluation sheets from both learners and facilitators and this is used to improve programmes. By doing this centrally, resources at business unit level are freed up to get out to meet internal customers, discuss needs and 'advertise' what programmes are available.

> Thoughts from an Academy manager:
>
> - promoting one Group Five Way
>
> *... we drive processes. We understand processes. Not only learning and development processes but other processes. We drive systems, we drive network partnerships, relationships in the organisation. We get people together, we act as that glue between business units. The Academy ... the constant of the Academy over the past two to three years [was that we] really got business units down to think about a one Group Five. Because in the Academy we work with them as a team.*
>
> *And standardisation. We did a lot of standardisation over the years. ... Standardising vendor management. Standardising how we deal with reports, scorecards, through the L&D Forum. Through … L&D Forum, helping to assist us standardise how we do skills development. Why? Because there is one way from a legislative point of view how we deal with skills development. And that needed to be filtered down into business units. And we think the only way to do that is to have one central point making sure that it gets standardised and that's why we are there … to oversee that transition.*

Standardisation and finding a common best-practice approach is a core fundamental for the Academy. This is achieved partly through customisation and partly through its ability to reach across business unit boundaries and then using the Academy as a mechanism to disperse the message. Examples range from technical approaches through to the alignment of leadership thinking and behaviour.

Common best-practice approach:

The Group Five Way
The key focus for the Group Five Academy is to inculcate the Group Five Way as a fundamental within all learning interventions – to provide a touchstone to all curriculum design. A consistently high standard of conducting business across managerial, administrative and operational functions is essential to competing in an increasingly fast-paced and demanding environment.

(Board Report FY 06/07)

Thoughts from an HR director:

- one-stop shop to build a greater oneness

I think [the reason for the Academy] *was to try and create a structure for the business units to draw on one area ... I think it was an idea that we had to create, almost like a one-stop shop with regard to training and development and to encourage the business units to use the same things. The same processes, the same service providers and not basically be in and out and you doing your thing and me doing my thing. I think, initially that was maybe what kick-started the process was to say that we needed to find a way to bring training and development into the Group, but we needed to make a way to make sure that it could reach everybody in the Group.*

So, as a result of that initial thing, together with, at that point in time, a greater oneness among Group Five. Because that was also where each business unit was doing its own approach to things. And the Academy, therefore, had twofold reasons in two areas. One is a one-stop training institute to get all this young talent and develop them in a consistent Group Five way. And number two, I also think the Academy was there to further assist, which ... must have been a key exco strategy at that point in time [to] *create commonality amongst Group Five business units. So that was almost a way to influence the culture from an Academy point of view. Because what you are going to have now is all these youngsters from all these various business units and what better way to get the culture of oneness than in this type of environment. So that is what I think the original reasons were for having the Academy, as well as the fact that we were hopelessly short of people in 2006.*

To meet the Group's strategies and goals requires a 'one company' mind-set rather than the in-house caricature of 'a group of five' companies. Without alignment there are no economies of scale or access to bigger projects with better margins. Projects are also under greater risk of margin erosion and non-compliance with the plethora of regulations and legislation in the construction sector.

The benefits of the Academy engaging as an umbrella structure to support alignment and a common approach are clear in varying degrees as reflected in the discussion above. Equally important is the role of the Academy in building a learning culture.

6.4.3   Build a learning culture

Building a culture takes a long time and requires a good deal of concerted effort. Culture is generally created by senior management, and culture is strongly influenced by policy and the things that companies pay attention to. In the case of the Academy, the widespread support of senior management influenced the culture, which in turn allowed the Academy to influence culture through the students. With up to 17 000 attendees of learning interventions per annum there is opportunity to encourage learning, networking and collaboration. Approaches such as action learning, help embed learning but also have a significant ripple effect on work teams and work environments.

Insight from a managing director:

-        developing a learning culture

And with ... also pushing the culture which comes from the other side with performance appraisals and trying to coordinate what people need and do it in a coordinated fashion and not just do the adult training as we referred to before. I think that whole learning culture is developing in the company.

Insight from a learning and development officer:

-        creating a learning organisation

I think, … well a lot of it was to centralise learning and development but also a lot of the business units had training officers but we also needed to, because training and development was becoming so

A learning culture driven and actively supported by top management is necessary to create a pervasive learning environment:

Leadership and Management Development have been identified and confirmed as an on-going strategic priority in Group Five – by exco. The rationale being to drive leader behaviours and establish a common leadership language in alignment with Group Five's vision, strategic objectives and values.

(Board Report July 2009)

Recognising potential and providing opportunities for development are essential to an organisation's future. Part of the role of the Academy is to run programmes that provide opportunities that give a solid foundation of theory and also impact on behaviour so that beneficial outcomes are ploughed back into the workplace, and where possible result in opportunities for career advancement.

Comments from an MD on providing learning to raise standards and establish a benchmark:

-        opportunities for all

[We] *start educating when the people* [come] *into our business, those that have the potential. And also for those that might not have had the same opportunities, that have the potential. There is an opportunity to train them now and give them the same opportunities. I think that's something that I've seen as well – that at least there are equal opportunities now and you know that once someone has been through the Academy courses, what you can expect from them. And obviously there are those who will raise the bar and are better than others, that's like with anything. But at least you know where the base is.*

Comments of an Executive Committee member and an MD on identifying talent through learning:

> \-   identifying talent
>
> *I mean you look at some of your guys that you actually had through the Academy … some good guys. I look at that and I say, "There's a future MD". You can see it, it's there looking at you. That they have got the ability, they have got the credentials. They talk to you. And that is the future. From a succession perspective, unless we put these guys through internal things that we are doing at the Academy, we won't know that.*
>
> *And as it sort of got rolled down to the more intermediate levels, to almost have a seamless process moving through – we start with the senior management, but if we look at the middle management and the effect on the middle management – that is probably the bigger effect we have. Because we see these guys coming through and we can now better identify those that are going to make it to the top, and the guys contribute more proactively into the business in terms of their own management skills.*

In modern times there is an increasing realisation that learning is essential in order to progress. In addition to this, individuals no longer commit to being lifetime employees, so they need to constantly grow to be marketable. When an organisation is committed to learning, individuals see the benefit and are more inclined to stay with the organisation.

> Comments by a learner, a senior director and an Executive Committee member:
>
> \-   employee attraction and retention
>
> *I really thought it* [the Academy] *was to attract skill and retain staff at all levels to promote learning and encourage learning and interaction across the different business units.*
>
> *But it certainly seems as though over the five years that it's [the Academy] developed, that it's become an attraction as well. It's something that you can look back in time and say, it has added a significant amount of value. And it's something that new entrants into Group Five and certainly into the industry generally see as an attraction, knowing that they are going to be receiving some support from the company, structured or otherwise, and not just left to their own devices. So it's had that added spin off. It becomes an attraction factor as well as just repairing the skills damages of the past.*
>
> *I think it* [the Academy] *obviously attracts individuals who are looking for that type of organisation, so automatically you are starting to fill the organisation with young blood that has that type of forward [thinking] process and because the benefits have been demonstrated, the existing employee base can see the benefit. So I think it's allowed an existing base to be transformed a little bit and it's*

definitely encouraged new feed into the organisation, that they understand that. I mean the number of times I've interviewed people where the Academy has come up as a point of discussion. I never asked whether it's because what you do is so different from other academies or if academies aren't that freely available or that type of offering is not as freely available in corporate South Africa. But regardless of what it is, people are attracted by it. They read up on it and it's probably the question that I would ... If I had to say, "What's the question you get [asked] most?" It's that. That, and why am I in Group Five. But that's a different thing. I think that's a woman side of things. Why a construction company? But, yes, the Academy and why I'm at Group Five are probably the most common questions at interview stage for recruitment of people. Definitely.

In addition to the relevance of having a learning resource that can be tapped into, one of the benefits of the Academy is that it provides forums and opportunities to network, learn more about the wider Group and establish relationships which are useful in a business environment.

Feedback from an HR director:

- creating a culture and breaking down silos through networking and learning

And you never quit, because that is just the culture of the business. So that's where I think it really got people to understand. Even [employee] was wanting to quit the one time and I had a quiet chat to him and said, "Do you value your future at Group Five?" He said, "Why?" I said, "Because [managing director] will not accept [you quitting], yes, we know it's tough, but you have just got to make a plan. Others have done it, why can't you?" So that's where I think, where culture plays [a part] .... And obviously with the Academy itself, people have got to have a culture of learning and that certainly exists in Group Five. Especially the youngsters, they want to be developed. They want to learn, they want to grow. They want to meet other people from other business units. The only people that want to keep the silos are the heads of the silos. Everyone else wants to interact and wants to learn what other business units are doing ... and seeing them as colleagues. So that's where I think culture plays the big role.

Do you think the Academy has influenced the culture in your business unit? Definitely. Because people have come back more open. Because people have come back having interacted with other business unit staff. They, therefore, are far more open and certainly see Group Five more as one big business as opposed to just seeing Group Five [business unit]. So, I think that has really opened [up thinking]. And the culture – "we are all part of the same Group Five" has been advanced far more through the Academy than through any other intervention I'm aware of.

The role of the Academy has changed over a period of time, from one of initially focusing on building skill and capacity to one of making a greater impact on culture and the need for change.

> Remark by an HR director:
>
> - transformational role
>
> *And that's where I see the Academy's role has changed from a creator of training structures or a training model for the Group to one of maybe driving culture and change more, which is a more transformational role.*

The role of the Academy is influenced by needs within the business. At all times there should to be a clear understanding of what the relevant needs are and whether these are being met with the delivered outputs.

6.4.4   Academy outputs support the organisational strategy

Tangible outcomes need to be demonstrated with a link back to the original need expressed. At more senior levels a growth in capacity is important, whereas on-the-job expectations from direct managers are more likely to be linked to immediate benefits either through acceptance of more responsibility or through improved outputs. At both these levels there is an impact on strategy.

Other outputs feed directly into strategic initiatives, for example, the need for better project management on large multi-disciplinary projects.

> Insight from two senior board members:
>
> - return on investment
>
> *Now, you could say, well, we should adopt that or it's in Group Five already, but I think that they [business unit management] have realised that they have to train people because the people, the raw material that has been coming out of training colleges and so on, was not good. So they were forced to do that. So I think that is ... you know, sometimes the educational system is not ... it's fallen backwards to an extent. Hopefully we can catch up as a country but it has forced people to invest in people ... in training. Others just don't see the need. They look purely at cost and they say, "A guy*

needs to be on site, he needs to be working". But those are the business units which have low intellectual nous and probably are those business units which underperform. It's measurable.

- learning, engagement and networking as outputs

Maybe it's three areas [of benefits that the Academy delivers]*. I'm saying the absolute content, the actual theory in the programmes. That's the one, the second is then the engagement, the engagement, breaking down barriers by having multiple business units* [in one class] *and … building networks across* [business units]*. So not only am I getting the theory, but I'm understanding – live – what is happening and practically what is happening in other business units, and thirdly, I'm building relationships that I can call on – relationships and networks in the organisation. And I'm sure people leverage those networks.*

Flexibility to meet needs in a manner which best suits the business unit is not always possible. A lot of work is done to get as close as possible to 'bringing the training' to the people, for example, in many instances learning is delivered at a site level. This boosts attendance and also builds relationships between the site and the learning professionals.

Feedback from a managing director:

- delivery of training on site

One sees how things develop, and the need ... and there has been a big need that has been created to sometimes ... well, often on the new sites, is to actually take the training to the sites. So one doesn't always go to the ... let's say to the training grounds themselves, but you take the lectures rather to the sites. And to me that's been successful in that we've been able to be flexible to do that.

Building networks and trust is a good basis for success, and this requires the willingness to engage and make the extra effort. Benefits are realised at a greater pace and to a greater degree because the understanding of the Academy programme designer or manager is increased and this has a positive impact on future programmes and programme roll outs at business unit level.

Changes in behaviour noted by an HR director:

And then your biggest thing is all the alumni that get back and say wonderful things .... We saw the results of people coming from Academy programmes with a wider view of the world, and we started saying, "Wow, this thing is really working".

The need to build trust does not only apply at HR level, or at employee level; it applies even more so at senior management level of business units. Since the commitment of senior management is essential to support learning – particularly initiatives like mentoring where on-going visible support is needed – it is important to provide the backing required to enable the successful implementation of learning projects.

Mentoring: [Business Unit MD] is willing to commit to the process and wants his management team to commit. They are reviewing the model and are driving needs accordingly.

(Academy Operations Meeting Minutes 250311)

Outputs from programmes vary across a wide spectrum, from direct outputs (such as projects which have been implemented in the workplace and advertised via presentations to senior management) to less tangible outputs (such as a growth in understanding of how the wider business works and where further opportunities for business exist). The success of an organisation is in the hands of the people – and the more competent and skilled they are, the better the chances of success.

6.5   Competent and skilled employees are needed to execute strategy

Figure 25:   Causal link of strategy and goals to competent employees

Individuals in the organisation contribute to its success, and these individuals are leaders and managers who engage daily in the workplace to deliver according to the organisation's strategy (Figure 25) to achieve this success. Lack of skills and

expertise in Group Five resulted in the need to find ways to speed up competence development without increasing organisational risk. Customised programmes as well as smart approaches were needed.

A senior board member gave an indication of linkages of strategy to the Academy:

- strategic linkages and fast tracking individual growth

Well, I think there [are] *a number of things maybe. One is that the strategy itself is discussed in your programmes – not all of them, but certainly the leadership ones – so people might understand what a strategy might look like. But I think the fact is that we are trying to become more intellectually rich in this organisation. We could never contemplate being in EPC [Engineering, Procurement and Construction] contracting or multi-disciplinary work or investments and concessions or putting much younger people with many less years of work experience into the types of roles that we do, unless we had something that gave them ... let's say a fast track. You see, it is fast track compared to their fathers or their older brothers. I mean you take the youngsters that are now running contracts, and I can't talk for all the business units because I'm not that close to all of them. But just take* [business unit] *for example, where I came from, and you look at the youngsters there, they are just out of their nappies nearly and they are running contracts of millions in some … forsaken part of Africa and they are doing a wonderful job. Some of them are girls. So how could we ever have contemplated that in the past, where the only way you got to do that was to have this long apprenticeship with Fred. And Fred, you know, didn't really tell you much anyway so you learnt by osmosis. And now we're saying, "[Forget]* that, these youngsters know more than the old guys because they are being professionally trained". *They have got project management and a business management acumen. They have been through supervisory training, they have been through* [learning programme] *so they understand the people dynamic. All of those things are tools of leadership which wouldn't have existed at all had we not had the Academy, there is absolutely no doubt. So it starts to flow in the performance of business units – that's the measure. And some of them* [business units] *are behind the curve because they don't spend enough time on participating on what's on offer and others do it to a fault. And you start seeing the value that is created in those organisations. Now, I think you can start measuring this in lots of millions of rand.*

Creating a pipeline of talent that feeds into the organisation, along with the relevant level of 'readiness' for the role and the next level, requires planning and collaboration with a number of role players in the business – including HR, line management and senior management. Bursary student recruitment, for example, is done via panel interviews where business unit management and HR are present.

An HR director highlighted bursary student management as an important factor:

- getting the right people into the business

And the students, the co-ordination of the students, was a key deliverable, and trying to get that into one place and managed consistently and [with] *better quality students feeding the organisation. Now, those guys who came through that scheme are now entering what? Five, six years after qualification? And therefore they are now becoming your managers, your site agents, your senior QSs and you are starting to see the better quality student and the result of that. So I think that was the first thing. Let us grow our own timber and make sure it's good quality timber and I think everybody will admit that it's much better than before.*

An example given by the Learning and Development focus group regarding the quality of 'new timber':

- development fast track through learning pathway

We had [a bursary student who graduated and entered the business] – he went on G5B3 and then he went the next year on PPM. He's just been made a Site Agent 3.

Costs of training are only too readily calculated but rarely can they compare with losses on projects that have been the result of human error or lack of competence.

An Academy manager noted the consequences of poor skills development:

- results of a lack of skills development

Losses, and the realisation of the Group that losses are directly linked to poor performance and skills development. So the expectation that I have of the Academy is that we really drive the skills development component in this organisation to ensure that the companies stop making losses.

Feedback from a graduate of the senior leadership development programme on the impact on individual growth:

- value add to the individual and also the business

> *The quality of the courses that are given to our people, and I've listed them all here, contributes to the people that run our business and it's massive. I mean if you take someone who is a contracts manager and they didn't know for instance how to do financial accounting or read a report or whatever the case is, then you battle as a QS to actually then read it. And in their PMD you get exposure to it. So I'm saying that just the quality of the courses that are offered impacts on our people. And you can see it. PPM – when they do their project management stuff it helps them when they get back into the environment to break things down to see whether it's working. Situational leadership – maybe someone on site has been going through a hard time and you don't know that he's not fit for that specific thing and at the moment he's in a space of a D3 or D4 relative to not having the competencies, then you can address the issue and you don't just call them idiots. Because that's what happens on site a lot. And yes, Targeted Selection – I mean you are constantly interviewing subcontractors, suppliers, your own people. If you know the techniques then you can use them. So there is a huge value add to our business units relative to the courses that are offered. Because the courses that are offered are not ... [rubbish]: they are proper content.*

The need for competent and skilled employees to deliver on strategy is a logical requirement. However, the real benefit lies in being able to actually see the impact of training and development initiatives on individuals – and to see the speed of reaching competence and implementing knowledge to the benefit of the organisation. This grows levels of trust between the Academy and the line managers and leadership, and within the Academy it grows even stronger incentives to train employees further. The net impact is a direct benefit for the organisation.

6.6 Organisational success is achieved by competent and skilled employees
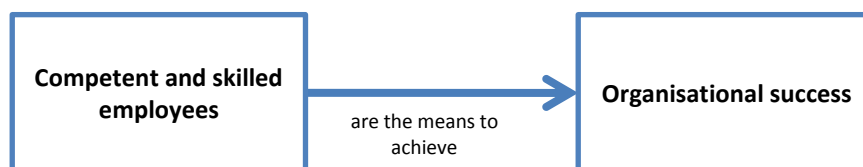
Figure 26: **Causal link of competent and skilled employees to organisational success**

Building competent and skilled employees who are able to contribute to the success of the organisation (Figure 26) takes a number of resources. These resources include time, focused learning, development personnel and budget, to name a few.

Generic stages would commence with understanding the business need (in conjunction with the strategy), putting together a budget, establishing a training committee, involving stakeholders, managing the implementation of workplace learning and promoting a culture of lifelong learning by working with key stakeholders. Clearly any one of these stages is complex and there are also significant costs involved.

A logical starting point is to ensure that the core skills of the business, either technical, management or leadership skills are developed.

Feedback from an HR director:

- meeting developmental needs to achieve strategy

So, "what role do you think the Academy plays in meeting our developmental needs to achieve our strategic or human development need"? It's what you guys have done since 2007, you know. If you look at all the people that have finished PPM, PMD, CMP and G5B3. That is why we were able to achieve our strategy.

From the increase in training spend in the last five years it is clear that the Academy has grown with the business. This would not have been possible without a clear indication of benefit and delivery towards the strategy of the organisation – and ultimately of a contribution to the successful completion of projects through competent and skilled employees.

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6.7 Organisational success adds pressure for greater achievement from leadership
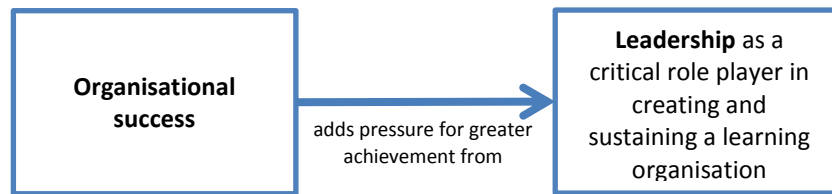
Figure 27: Causal link of organisational success to leadership

As indicated in Chapter 4, which introduced and gave a background to the case study, there has been an increasing spend on training and an increasing number of attendees of the training offered. Based on this success, the leadership of the organisation (Figure 27) has made additional resources of people and finances available to ensure that training and development continue, and line managers have released their employees to attend training. In addition, in many instances line management and senior management have acted as mentors either formally or informally to support learning in an individual and intensive manner.

6.8 Conclusion to the chapter

Context provided the catalyst to the establishment of a corporate university within Group Five, but it was the critical role played by leadership which enabled the Academy to gain a foothold and grow over a period of five years to a point where resources and support resulted in a significant impact on employees and the culture of the organisation.

Some of the actions and behaviours demonstrated by leadership included providing the vision for the Academy, and then making it happen by providing the resources and the support required to launch it. Continued consistent visible support was given through attending launches, graduations and presentations, and contributing to guest speaker sessions. This active contribution was also shown in the involvement in customising and providing inputs to material design, particularly in the more technical

programmes.   Many line managers and leaders became progressively more supportive of learning and created 'a space' for learning once they saw the benefits derived from the various programmes.

This chapter included references from interviews with a number of stakeholders as well as extracts from archival documentation in order to support the claims made regarding the role of leadership in building a learning culture. In the next chapter the role of the Academy is presented in a similar fashion, along with the supporting evidence.

Researcher's reflexivity points:

Perseverance and creative approaches

Sage but somewhat harsh advice provided by an HR director provided the confidence to persevere: "*You are the same as anyone else in this organisation – you need to prove you can **deliver**, on time, within budget and within spec*". At the end of the first six months I had built a curriculum of workshops and short programmes that had sufficient 'technical' content to meet the generally recognised needs within the business. These programmes were launched as a 'calendar' mapped out over a six-month period, and I started with a marketing programme. At that stage I was joined by the second Academy staff member, a seasoned learning and development specialist appointed as a programme manager, and then shortly thereafter a third staff member was recruited as an administrator.

The initial scope of the Academy

Being responsible for the learning and development of the Group was initially not overtly given to me – in the beginning the role appeared to be limited to the programmes we could deliver or offer to the business. Within 18 months the bursary programme and the IT training division were incorporated (along with the respective staff) into the Academy. In the same period, through a process of negotiating with HR, we (L&D Forum) were able to engage on a monthly basis with their HR administrators. Over the next three years we sponsored development programmes and qualifications (ODETDP) for the administrators to develop them into Learning and Development officers. This engagement with and development of the Learning and Development officers is still on-going. The scope of the Academy thus became all-encompassing of all training and development in the entire organisation (including systems, policy, strategy, vendor management and reporting).

My leadership role

In taking time out to understand the business and the business environment provided me with the insights into both the curriculum requirements and the approach to take in introducing the Academy into the business. This approach, in a nutshell, was pragmatic, timeous, well managed and visibly able to deliver results. Philosophical, abstract or ostentatious presentations or programmes would not and did not work.

I encouraged my team to take an "under-promise and over-deliver" perspective, and the Academy came to be trusted. To ensure that the Academy team was strong, very careful recruitment was done and regular meetings and fun activities were held to maximise the team spirit.

7   THEME 3: ACADEMY HAS A KEY ROLE IN DRIVING LEARNING IN THE ORGANISATION

7.1   Introduction to the third theme: Academy as the main 'learning' catalyst

The leadership of the organisation interfaces directly with the environment and the context within in which the organisation works and competes. In addition to this, there is a keen awareness of the goals and plans for the organisation for the way forward. In order to forge ahead, people are needed to achieve these increasingly complex plans and goals, and to do this they need to be competent and to be learning constantly. Therefore, leadership provides direction, support and resources to the Academy so that training and development can support the competence development of employees. The causal diagram below (Figure 28) reflects the relationship between leadership and the Academy.

Leadership as a critical role player in creating and sustaining a learning organisation

provides direction, support and resources to

Academy has a key role in driving learning in the organisation
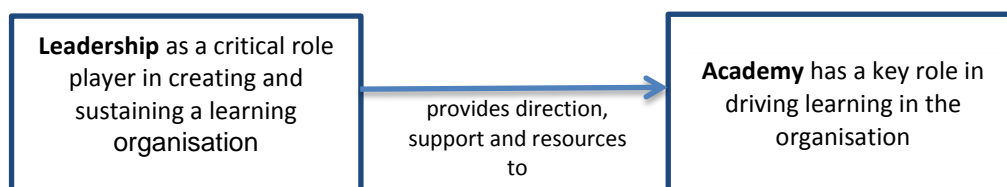
Figure 28:   Causal link of leadership to Academy

To meet expectations, the Academy needs to have the *right team* in order to harness *stakeholder support*, explore *effective approaches* to attain development solutions that meet business needs, implement *efficient systems* to manage information, and implement *communication* that is timeous and sufficient to keep engagement levels between the business and the Academy at an optimal level. With all of these elements functioning effectively, the Academy as a team, in collaboration with

human resources professionals, is enabled to deliver developmental initiatives *in line with organisational strategy.*

7.2 Academy as the vehicle driving learning in the organisation

The Academy forms a fully functional independent unit and typifies a recursive level of the greater Group Five entity. This means that related policies, systems, governance, administration, finance, and so forth, fall within the sphere of responsibility of the Academy team.

In this chapter, the discussion of *Academy has a key role in driving learning in the organisation* is split into a number of different variables for an in-depth look at a detailed level.
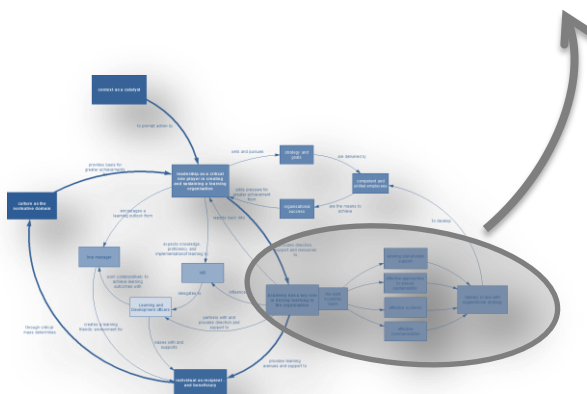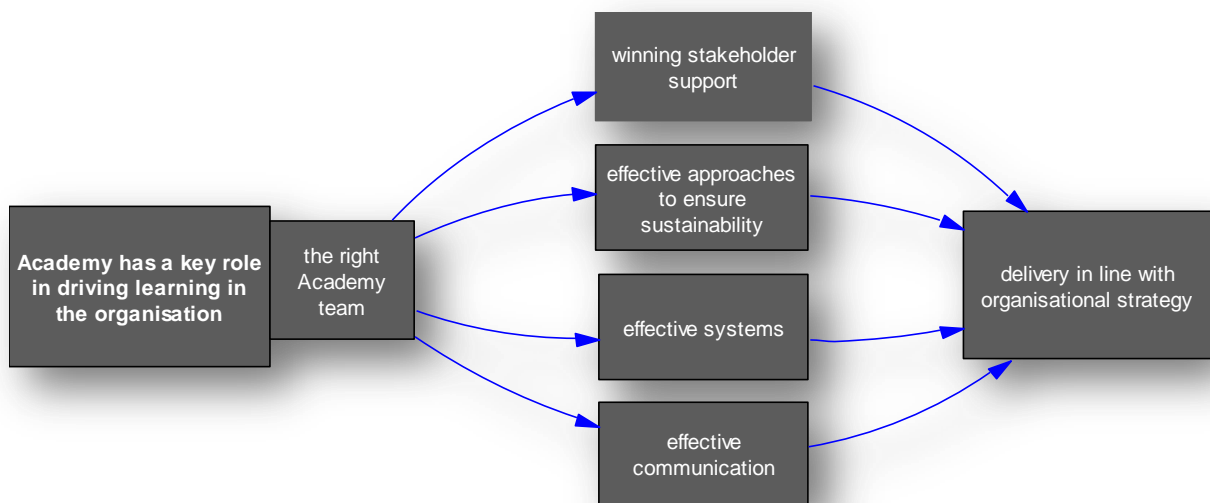
Figure 29: Academy driving learning in the organisation

In accordance with the diagram above (Figure 29), the main sections discussed under *Academy* are as follows:

- The *right Academy team* is a prerequisite to meeting business needs
- *Winning stakeholder support* through communication, consultation and holistic delivery
- *Effective approaches* to ensure sustainability
- The need for *systems* that work
- *Effective communication*
- *Delivery needs to be in line with organisational strategy*

These aspects, which are related to the success of the Academy and which surfaced during the data gathering process, are summarised in the figure (Figure 30) below.
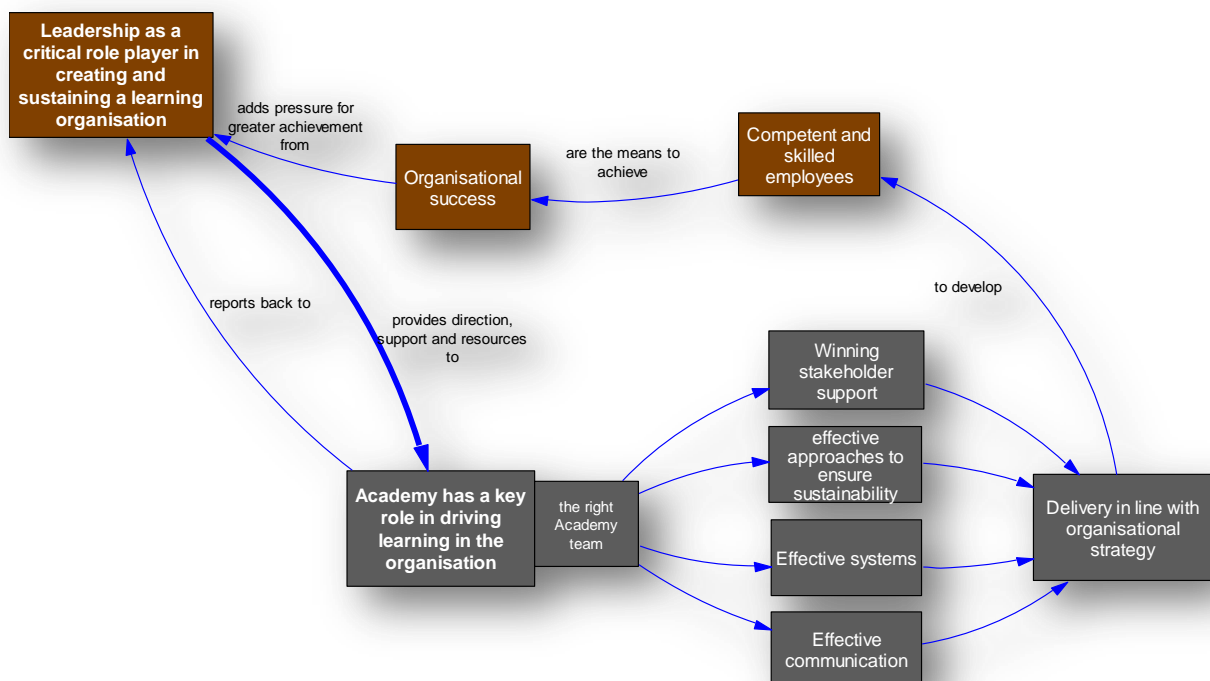
Figure 30:   Academy variables structured into a causal loop diagram

These separate elements and their respective relationships will be discussed in detail in this chapter, commencing with 'the right team' and concluding with 'delivery in line with organisational strategy'.

7.3 The right Academy team is a pre-requisite to meeting business needs

The Academy started in 2006 with one learning professional, and the team grew to a total of 11 in 2011. Individuals who joined the team had learning and development expertise, experience and qualifications. Recruitment was done carefully and profiles that complemented the team were given preference.

The range of deliverables, and the specific expertise and knowledge required, meant that it made sense to split the main team into three sub-teams, namely leadership and management development, skills development (including learnerships and bursary students), and software training. Technical training was split between the first two sub-teams dependent on the level of training to be done. The diagrams below (Figures 31 and 32) give an indication of the focus areas.
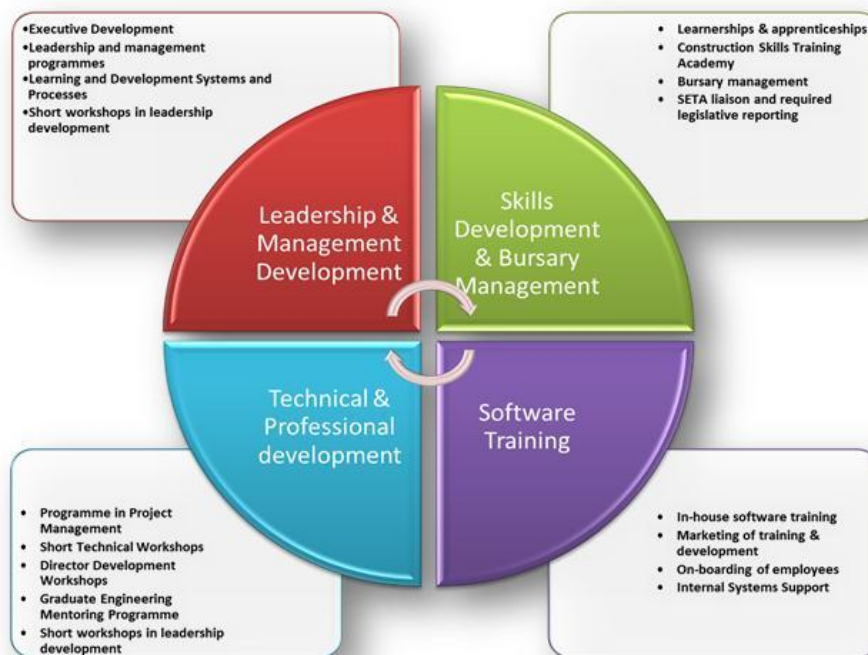
Figure 31: Academy model

The discussion below (as depicted in Figure 32) looks mainly at the behavioural aspects of building a good team to deliver learning and development to a large corporate:

- Encouraging team members to sit on committees

By sitting on committees and forums (such as Employment Equity, Communication, Safety, Learning and Development and Socio-economic Development (SED)), team members get to understand a wide range of business issues, and they get to 'listen' to concerns and challenges: this builds the business knowledge of each person and provides a basis for insights into how the Academy can contribute to further organisational development. It is also an ideal opportunity to network and to build Academy credibility – through engaging in a responsible and value adding manner, one person or forum at a time.

Team members are also required to give feedback at the weekly operations meeting that is conducted to keep the entire team up to date. This builds confidence in individuals and provides opportunities for 'group coaching'.

- Providing the right equipment to do the job

The workload is heavy and the hours are long, therefore it is important to provide adequate and up-to-date equipment and access to information (for example, when travelling). This promotes a 'working team' approach.

- Experiencing training initiatives first hand

Where possible, Academy staff need to experience the training (longer programmes and one-day workshops), both to improve their competence as well as to see the training from the 'customer's perspective'. When attending external workshops or conferences it is a requirement that time is scheduled for a feedback presentation outlining new learning and the way this learning can be implemented in the workplace. These activities ensure that even the most junior member is exposed to new learning or the opportunity to give feedback.

- Mapping processes collaboratively

From the inception of the Academy, all processes, procedures and checklists were mapped collaboratively. This ensured that consistent approaches to common areas of work or tasks were agreed upon up front. Very little 'policing' was necessary as each person understood and took ownership of the processes or checklists.

Figure 32:   Building a motivated and dynamic team

Stakeholders were included where possible, for example Learning and Development practitioners helped with workshop group policies (like the bursary student policy) before these were presented to HR and the rest of the business.

- Working across teams

Whilst individuals belong to separate sub-teams, they also play a role in other teams where possible. Maximising the capacity of all individuals on the team and doing cross training lower the risk of losing specific skills. It also ensures that all team members are equally 'loaded' with work and that results are delivered back into the business faster. Menial tasks are done by all, which helps to build team spirit and camaraderie.

- Managing finances

All teams are responsible for their own budgets and need to manage them closely, as well as provide monthly feedback. At monthly budget review meetings each team gives a great deal of attention to detail, and discussion provides guidance and

understanding. Negotiation with service providers is encouraged and supported, and cost savings are celebrated by the team.

The benefits of this approach are, for instance, that less 'control' is needed in the longer term and that teams enjoy the challenge of compiling and then sticking to their budgets.

- Professionalising roles

Team members are encouraged to study further in the field of learning and development or in areas that will build their capacity and deliver a return to the team and ultimately to the organisation.

- Delivering on promises – and not 'dropping the ball'

Trust is broken if you keep chasing new projects and do not continue to deliver and improve on existing programmes that are giving value back to the business. Pressure often comes from 'early adopter' business units who are keen to develop people in new areas and have the vision of the potential for impact on the business.

A number of business units fall into the 'slow adopter' category, and they usually need to be encouraged to join and take part in programmes. By the time they join programmes, these programmes have usually been thoroughly tested and improved upon, thus there is an excellent chance of the training meeting expectations and the identified need. This then lays the foundation for quicker adoption of new programmes, because trust has been built.

Checklists, as a way of managing established Academy programmes, are important to ensure a consistent approach and continuity as a programme settles into maturity. This helps ensure that the team does not lose focus as they balance new initiatives with those already in place, and in so doing they deliver optimal returns.

- Managing reputation

The list of potential new projects is very long indeed, and the daily pressure and requests for assistance are an indication that the Academy is seen to 'deliver the goods'. Maintaining this reputation is in itself a challenge. The role of 'service

provider' includes, on the one hand, careful selection of initiatives and, on the other hand, management of expectations. Research is done thoroughly, and tests or pilot sessions are conducted whenever possible. Subject matter experts (SMEs) within the business assist to ensure that the content and the approach are appropriate. SMEs also usually 'champion' the programme and function as the 'face' of the initiative. The Academy team then plays the supporting role and rolls out the initiative with the assistance of business unit learning and development representatives.

On a few occasions mistakes were made by the team. The approach taken was to immediately and clearly communicate the problem at the appropriate level and admit responsibility. This was then followed up with remedial action and comprehensive support. The net result was that trust was maintained. An example was an issue with a provider who had not been honest about the scope of their accreditation (and their hasty attempts to gain accreditation had failed), and the outcome was that a group of students had to redo many weeks of portfolio work. Individual contact with each student, line manager and HR manager was initiated and continued until the portfolios were successfully submitted under the accreditation of a more rigorously scrutinised service provider.

- Selecting a diverse Academy team

The team comprises very carefully selected members who have technical skills and a passion for learning. Diverse backgrounds and cultures add value, and each member has an equal 'voice'. The most recent addition to the team is a graduate from an administration learnership run under the management of the Academy. The learnership was aimed at unemployed disabled people, and was an industry first.

- Giving recognition – celebrating small wins

A great deal of positive feedback and many emails of acknowledgement are received from learners and from management. Whenever possible, this feedback is discussed and credit is given to the delivery team.

- Ensuring communication

A constant and consistent flow of information inspires confidence, and all in the team are expected to reciprocate. Weekly Academy operations meetings keep everyone informed. These meetings were instituted early on in the establishment of the Academy and have been maintained since. The chairmanship of the meeting rotates, as does the minute taking. These meetings encourage follow up and follow through, and they provide an opportunity for creative solutions and thinking.

All these aspects, as summarised in Figure 32 above, are behaviours which are actively promoted to ensure that the Academy has the right team mind-set.

7.3.1   Perspectives from within the team

The Academy strives to operate as a professional and cohesive team, and the shared passion of each person makes this possible.

> Comment from a founder member of the Academy:
>
> - team evolved with the emerging needs
>
> *... we employed for a specific reason but then, as we evolved, people's roles had to evolve ... that is where we started skilling them and that's [why] … the Academy has a cross-functional model – makes it much easier. If you had a very portfolio or specialised [model], it wouldn't have been possible. … So the skills sets have been very important, not only in the area where we have employed them.*

The Academy is perceived as being successful, but an understanding of why this is, from a team perspective, requires some reflection. Given that the nature of the industry is very deadline driven and, therefore, that productivity and results are of paramount importance, the culture of the organisation is to give recognition to results and outcomes. This requires a good deal of project management skill, engagement at the highest and lowest levels, and follow-through on delivery.

> Discussion between Academy staff:

- acting on feedback

Understanding why we are successful is then also not to be afraid to tackle areas where we do have gaps and actually welcoming some of that criticism, that feedback, and sometimes when it's been negative criticism we've taken it in a very positive fashion. And I think that's stood us in good stead.

- an action-oriented team

We are able to realise our gaps more quickly than other teams because we are a strong team. … I mean, seeing it through the scorecards, seeing it through the audits, if there are issues, let's change it. Let's get there, let's get it done.

7.3.2 From the outside looking in

The Academy is seen as a team by the business and by individual learners. There is a sense of pride when employees discuss the Academy and it is clear that to a large degree the employees 'own' the Academy. Feedback from senior management is very positive. Some of this feedback is reflected below.

Reflections of senior management on the Academy team:

… I think as the Academy has become entrenched in Group Five – once you had got the credibility to deliver – you established a culture of learning that people buy into.

I think the resources at the Academy … [are] highly competent and influential. I think, through just pure hard work and delivery to the business units, they have earned their stripes, created a need … and therefore, because of that they have got the agenda to say, "Okay, here we are, and we can give you more". And the guys are [susceptible] to that … they are welcoming those additional services that would be offered.

7.3.3 Recognition from within the organisation and from the business community

A number of different achievements have been attained over the last few years and some of the most recent are noted below.

Group Five has received the award as the best company to work for in the construction sector a number of times and has also ranked in the top 10 of the best

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companies in the large businesses category – (see photo below: Figure 33). People development plays a large part in the achievement of these awards.

Figure 33:   Receiving the Best Employers SA certificate (Top 10) from the CRF Institute

The Financial Mail Top Empowerment Companies awards are conducted annually, and awards are presented based on achievement in the sphere of transformation. In 2010, Group Five ranked fifth in Skills Development in South Africa, and in 2011 moved up to first place with a score of 14.66 points out of a total of 15, which is a creditable achievement in the light of market conditions. Some of the news coverage in the *Financial Mail* is indicated in Figure 34.

A proud achievement for the Academy team was being awarded the annual CEO team award for outstanding teamwork in 2011. The internal company magazine carried a photo of the Academy team with the award (Figure 36) and an article (Figure 35) noting that the award coincided with our fifth birthday.

Figure 34:   Financial Mail Top Empowerment Companies 2010 and 2011

Figure 35:   News article in internal magazine

The Academy forms a cohesive functioning team, and, although there are some of the usual clashes, there is no doubt that each person is proud to be part of the Academy at Group Five. Aspects for each team member to remember are the importance of customer service and the responsibility to deliver. Part of this role is being aware of who our customers and our stakeholders are, and what needs we are required to meet.

Figure 36:   Academy receives the annual CEO team award

7.4   Winning stakeholder support

To win stakeholder support requires understanding of two apparently fairly simple aspects, namely who the Academy stakeholders are and what their requirements are. The needs of stakeholders are not always easy to determine, however, through on-going engagement these requirements are brought to the surface. Stakeholders and key needs are enumerated below (Table 26).

7.4.1   Role clarity

Apart from stakeholder needs, the key question that must also be clear up front is: What does the Academy need in turn from stakeholders in terms of support? (See Table 27)

Table 26:   Key stakeholders and their needs

Learners/employees	Workshops and programmes that meet current and aspirational needs
HR	Guidance on building capacity for current operational needs
L&D	A partner with the requisite skills and knowledge to provide just-in-time support and direction
CEO and Executive Committee	Workshops and programmes that provide stepping stones to fulfil future strategic people requirements
BUs: MD and directors	Partnering and strategic guidance on people development for short- and medium-term future needs
SETAs	Implementation of programmes to reach planned goals
Service providers	The organisation's patronage but also successful programmes to build their reputation

Table 27:   Academy's requirements from stakeholders

Learners/employees	Engagement with and commitment to learning opportunities, and implementation of learning in the workplace
HR	Acting as the middle man between BU management and L&D person; empowering and supporting the L&D function within the business
L&D	A partner with the requisite skills and knowledge to co-ordinate and run the learning function within the business unit
CEO and Executive Committee	Communication and guidance on the future strategic direction of the organisation; follow-up with Group-wide communication and visible support for the Academy; resources to achieve the mandate
BUs: MD and directors	Provision of insight into BU-specific strategy; empowerment of L&D specialists at BU level; visible support for the Academy
SETAs	Clear, timeous communication of requirements and

	support for programmes, including material and funding
Service providers	Ability to align and customise according to our needs and to keep to agreed delivery requirements. Service providers need to believe in people development.
Academy Steering Committee (HR)	Provision of feedback on learning needs and progress/impact of current initiatives
Learning and Development Forum	Partnership with Academy to deliver on organisational needs; participation in a 'community of practice' to share best practice principles.

The clarification of roles is best achieved with a clear engagement up front and then through on-going interaction with stakeholders. An example of role clarification with the Academy Steering Committee is captured in the minutes of a Steering Committee meeting (St 040707) held in mid-2007:

The role of the Academy Steering Committee:

- Ensure the Academy supports your BU needs.
- Generally support learning in the Academy.
- Communicate the detailed strategy of the BU to the Academy – particularly where the Academy can act in a support function.
- Communicate the detailed Workplace Skills Plan (WSP) to the Academy.
- Facilitate engagement with and co-engage with SMEs or focus groups to gather information.
- Change mind-sets at all levels about prioritising learning initiatives and moving towards being a 'best company to work for' to facilitate the retention of people and development of talent in the organisation.
- Attend launches, graduations and ad hoc events, and join the groups informally where possible.

When roles and expectations are clarified there is a better chance of alignment, communication of perceived needs, joint prioritisation and support of initiatives.

7.4.2 Stakeholder communication and consultation

Communication and consultation, along with strategic updates in face-to-face meetings at regular intervals, provide the opportunity for aligning the goals of the Academy and the business units and for having a forum to communicate issues on all levels. Relationships are established and trust is gained incrementally. Examples of this engagement are indicated below.

Extract from Board Report:

> In addition to this, the Academy has visited almost all BUs (MD, HR and L&D) to review and discuss Annual Training Reports and Workplace Skills Plans (as submitted to SETAs) in conjunction with individual BU scorecards and additional reports presenting information not hitherto available from our systems.
>
> (Board Report Oct 10)

Consistent and pertinent reporting:

> Academy Progress Report – in summary: Skills development and spend and training numbers have declined considerably year on year. Whilst this was anticipated given current trading conditions some concern remains as July to November [usually] attract almost two thirds of training spend.
>
> (Board Report Jul-Dec 10)

Reporting on programmes is done weekly, monthly, quarterly and annually. All stakeholders need to be engaged on an on-going basis, therefore reporting is important. Quarterly reports are presented to the Board, monthly reports and feedback to HR and the Learning and Development Forum, and weekly operations meetings are held to keep the whole team up to date on activities and developments. Minutes are kept for all meetings and circulated to the relevant parties.

Reporting is important to both communicate and to force a more holistic view through reflection. Reporting also provides direct and timeous feedback on implementation and delivery.

7.4.3 Holistic delivery

The nature of the organisation is such that it focuses strongly on delivery. An early conversation with a senior HR director led to him commenting: "... you are on the

same footing as everyone else – you need to deliver on time, within budget and with spec – and then you will gain a foothold".

This view is echoed in an interview with a senior contracts director who cautioned as follows:

\- show value up front

This industry is very difficult, firstly to train – because people don't have a regular schedule and because their workload changes literally overnight. But I do think we've found a happy medium in terms of the programmes. … We have found programmes that have been good for the organisation and they fit and they contribute. What I have found with Group Five, unless you can show immediate practical value, don't even try. So if you are going to start with a really good leadership programme, but it starts off on a philosophical base, you are going to struggle. It's got to start with showing very practical value. Then you can go philosophical but you have got to come back to practical. So everything is about practical value.

Feedback from senior management of a 'late adopter' business unit:

\- delivery on a number of fronts

But I don't ever recall thinking that it wasn't working. I think it [the Academy] got there, got on with life, started doing things and it's developed all sorts of aspects to it over time. Whether it's the newsletter … the Academy Newsletter, just telling you what's happening or whether it's information on the website or whether it's new courses that it's added. I think ... to me it was fine to begin with but I do think it's improved from there.

I think there was time spent on selecting service providers. I think there was time spent on deciding which courses the Academy would, if you like, offer internally. What could we do internally rather than outsource or what could we, let's say, adapt to become a Group Five-specific course. And to me, I think all of those five things have happened over time.

And so we've had a mind-set change, I think, in organisational terms, of what the Academy is able to offer. And that mind-set change, in fact it creates a platform that the Academy can work off [from] and, if you like, yes, [the Academy] has developed a reputation, but ... it's because of success in their offerings.

From the above conversation it is clear that both the senior manager and his business unit have experienced first-hand some kind of engagement with the Academy.

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Insights on behaviour from an Executive Committee member at head office:

- presenting a comprehensive package with incentives, delivering 110%

With the Academy, the big success, I think, has been, "Here is our idea, we present it to business, …. We need your people, but we will do everything, and, in fact, we will even subsidise or incentivise for you … and [we will] deliver at 110% value". And, therefore, the businesses bought into it. So, from a Group initiative I think the Academy has been the best success we've had of any initiative, because of the way it was implemented ... the way the offer was made. It was very much without pressure on the business in terms of what they had to contribute. Whether it was just resources or just any demand. It was very much … delivered to the Group and put into the business for their value before they even realised the value. And so by the time they noticed, because it hadn't impacted their lives negatively, it was already producing value. Whereas we do it the other way round with initiatives. We draw from them and then give back only 50% return. And the Academy kind of didn't ask for anything and delivered value. So the clever guys were on the bandwagon very quickly.

- more of a success than anticipated

… and the Academy was born. I don't think at the time the guys necessarily thought it through to the big picture, … and I think it's been more of a success than they had imagined, … they bought in the concept from what I remember and understand, not holistically as what you have brought the Academy to be.

</div>

Examples of how the Academy delivers:

Careful programme selection through research and sound implementation based on consultation with key stakeholders:

<div style="border: 1px solid;">

The completed report has been presented to HR and in terms of these findings the [university] met all the Group's requirements. As a next step, the report will be presented to Exco for final approval.

(Board Report Oct 10 (Jul 10-Sept 10))

</div>

When choosing programmes and vendors, a thorough research process is undertaken and a report is compiled. Discussion is commenced at L&D level, then taken up to Steering Committee level (HR), and finally, if necessary, up to Executive

Committee level. If top approval is given then this is relayed to the HR Steering Committee and then to L&D. Although this is a slow process, the subsequent implementation is rapid as the basis for buy-in from the key stakeholders has already been established.

Constant updates to stakeholders are necessary – but these updates also inform their understanding of the challenges:

> Formal programmes and workshops: update on PPM and G5B3 7 is currently underway. G5B3 in KZN has 23 students and going well. Dates for 2011 programmes were distributed for comment. Corporate Induction – held in August and went very well with good attendance. JB noted that the induction undergoes continuous improvement based on feedback received from attendees.
>
> (Steering Committee Meeting Minutes 160910)

Various stakeholders require different levels of feedback. Constant updates on progress and challenges on various programmes build familiarity with various offerings and the stumbling blocks that are experienced. This encourages an increasing understanding of the field of people development in a very practical way.

Stakeholder support is achieved through establishing and communicating clear expectations and pursuing holistic delivery with tangible outcomes that meet business needs. Stakeholder support will be negatively impacted if there is no visible impact on the business. To ensure sustainable impactful learning, effective approaches must be used.

7.5   Effective approaches to ensure sustainability

An understanding of the culture of the organisation is important before determining what approach will be the most effective. Data gathered indicated that there were seven distinct approaches that appeared to be meaningful; these included:

- Impartiality (serve all equally)
- Coherent, overarching philosophy (systems thinking)
- Centralisation and influencing of approach
- Customisation

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- Continual improvement

- On-going support

- Keeping the momentum going

7.5.1   Impartiality – serve all equally

A common business 'language' must be spoken across the entire Group – this is particularly important when working jointly (more than one business unit) on one site. Employees working in other provinces or outside the country (see Figure 37 for an example of a programme run across the border) must be provided with the same opportunities to ensure inclusivity, retention and aligned knowledge and behaviour.

Feedback from executive management:

-       impartial and inclusive

I think also the fact that the Academy has remained, if you like, impartial and non-aligned. It remains very much a corporate service and offers equally to every business unit and involves every business unit. So it's very much known as an organisation that deals with each of the businesses within the Group. It doesn't matter if you come from the manufacturing side, the materials side or from the construction side and the various business units within that. There is still a place for you at the Academy. So I think that, for me, has been important as well. That has helped to make it a success.

Figure 37:   Conducting a leadership programme for students in Ghana

Purposeful intent by the Academy:

> The new junior management programme will be rolling out in the new year – this is a skills programme which can lead to a learnership. This will be run in Gauteng, KZN and Cape Town. Each person on the programme will require in-house support in the form of a mentor.
>
> (Steering Committee Meeting Minutes 221008)

Feedback from executive management:

- gaining traction

But it did take a long time, well, a fair amount of time to get traction but that wasn't due to the lack of effort or anything else. I think it was because of the nature of the organisation which we are trying to move. I mean it is like an oil tanker at this stage. And you have got all these individuals or all these organisations that have got their own view on the world. And so any change in Group Five is not easy to implement. And because it was a human-resources-related orientation it needed to demonstrate that there was another way of getting change into the organisation other than just by brute force. So you were never going to achieve training and buy-in of people by brute force, so it was the long, hard road. But I think the fact is that people measured its [Academy] performance by its outcome, output. And as the output began to increase and have a high degree of credibility in the organisation, the buy-in accelerated. So it is one of these things that take time at the lead-in and then it accelerates.

An important aspect of providing a service is ensuring that employees have a good grasp of who the Academy is and what services and programmes it provides. An introduction for new staff is given at the corporate level induction, which is held quarterly for all new employees of a certain level. Our Group Executive Committee and department specialists are present to give presentations and engage with new recruits.

Executive management insight:

- academy establishing a profile up front

I think the other thing that the Academy has done a good job of developing, is ... the whole issue of inducting people into the organisation, which we didn't have before. And now you might say that is not a training course, but it is important for people that become part of the Group to understand what the Group is about. Maybe understand some of the philosophies, some of the thinking, some of the

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values, some of the strategies, some of the goals and just the capacity of the Group and how the Group is organised, structured, who is who in the zoo. So, for me, I wouldn't necessarily have thought of that initially as being part of the Academy's role. But I think the Academy has picked up nicely. And it makes sense because there is an organisation [the Academy] which is about development of people and involvement with people and so why not have that as one of the strings in the bow.

Induction is seen as part of the total package, and this is consistent with other initiatives where there is a very close link between business practice and theory.

7.5.2 Coherent, overarching philosophy (systems thinking)

In a large organisation it becomes even more imperative to start with a foundational philosophy or approach to learning and development which binds all the initiatives and approaches together. Although this philosophy is not overtly expressed or communicated, it becomes an intuitive 'trademark'. The philosophy followed by the Academy lies rooted in systems thinking and is outwardly manifest in an action-learning approach. This is the key approach, given that the organisation focuses strongly on implementation and delivery and expects tangible outcomes to be demonstrated by learners.

Academy manager feedback to CEO:

- systems thinking, implemented learning and managing complexity

It [a new programme] is at a high level and it is creating … its own momentum because we are seeing the value come back. No exams. All of it is implemented learning. And what I'm seeing here is … two things. It's the systems thinking … which is very valuable to our kind of business …. So it's that whole ... it brings in that 'whole' mind-set. … So it's now forcing … thinking that goes deeper and wider. So that, and then the whole [aspect of] dealing with complexity.

- changing behaviour through application of learning

… and it's very intense. But what we're seeing coming out of it is there seems to be some kind of excitement. And people and business units are talking about it and there is a response to it because they feel that this is really adding value … it's all about application. So you have got to change your behaviour which means that your implementation is immediate.

From the inception of any new programme design there is a focus on the link between learning and behaviour change. Action learning – in its true form – is practised in all the longer programmes. Projects must be implemented and critical feedback presented on lessons learned. An example is indicated below:

Building action learning into programmes:

> The Academy has facilitated the integration of Group Five specific projects into the PPM curriculum, with marks for the final module allocated per syndicate and consisting of a proposed 70/30 concept, i.e. project proposal documents will add 70% to the final mark and 30% of the marks will go towards the successful delivery of a project presentation.
>
> (Steering Committee Meeting Minutes 210906 and Board Report June 2008)

Working in partnership with service providers to build relevance and utility into programmes to deliver results directly back into company ensures longevity of programmes and benefit to the organisation.

Home-grown solutions are preferred as they are more closely aligned to organisational needs. Where they are a result of action-learning projects, the connection is closer, and buy-in and ownership gain faster traction, especially if they are marketed accordingly.

Where possible, programmes are based on action-learning principles, and this approach is first and foremost a work-based approach and is allied to learning from work experiences. This ensures that new learning is tested and thus has a better chance of 'sticking'. Managers are more sympathetic to time out of the workplace if the learning results are immediately visible.

Action learning focuses on real time and real-world issues:

> The class of students due to complete the programme in August 2007 are engaged in action-learning projects focusing on current business needs and these projects will deliver a measurable and distinct return back into the business. This real-time learning engages learners in a way that theoretical learning is unable to do – and there is the immediate and continued enhancement of skills, knowledge and experience.
>
> (Board Report FY 06/07)

Linking content of learning programmes to other programmes that are in place in the organisation, embeds the learning, and the overall programme is enhanced. The approach (for example toward leadership) is emphasised as 'the Group way'.

The Academy is constantly on hand to create linkages and entrench learning:

> The Academy assisted with portfolio of evidence discussion and planning during a session that took place on the 22 July 2009. This session also included a Situational Leadership overview.
>
> (Board Report July 2009)

Offering a continuum of learning ensures progression as well as the building of a common language amongst learners, as each programme tends to have its own philosophy, vocabulary and methodology. A continuum of learning also allows control to ensure that the philosophy, vocabulary and methodology are as common as possible across programmes, given that programmes are based on systems thinking and action learning.

The Academy offers a ladder of learning based on the same approaches and philosophy:

> A junior management in-house programme is in the design stage, the rationale being to feed into organisational needs in both leadership and functional areas. Successful candidates, who have embedded the learning can grow towards the next level offered by the Academy – thus forming the next step in the ladder upwards.
>
> (Board Report FY 06/07)

This junior management development programme was subsequently rolled out extensively in the organisation, creating the first step towards a common language and approach to managing people in the group. Figure 38 below shows a class of junior management students in Durban celebrating.

Creating a culture of learning requires a systematic and co-ordinated approach to learning programmes. Though much of the philosophy and the details of the specific approach are not communicated overtly, the outcomes match the existing culture of the organisation. This makes the chosen approach to learning easier to implement and for it to gain traction. A common approach is only possible if there is a central point of departure.

Figure 38:   A KZN junior management programme class

7.5.3   Centralisation and influencing of approach

Where training initiatives had previously been ad hoc and the approach was fragmented, the role of the Academy was to take a longer-term look at training and development.

Insight of a Learning and Development practitioner:

\-   centralise and influence

I think … well a lot of it was to centralise learning and development but also a lot of the business units had training officers but we also needed to, because training and development was becoming so important in South Africa and ... obviously I think across the world, you had to create a learning organisation and unless you centralise it you can't influence it. So, in order to influence HR directors, managing directors, even the training officers, training managers, to teach them, you have to create a learning organisation and I think that if that started as an academy then you can influence the business ... and that is also why you need an Academy.

A benefit of the central model is that programmes can be customised, which in turn influences the culture of the greater organisation.

Insight of an executive director:

> - economies of scale and outsourcing
>
> *I think also ... what has made the Academy successful was that we have got a blended approach to training. Some of the stuff we do internally and some of the more specialised kind of stuff that gives you external flavour we do from the outside. So, I think that model actually works well. So, I think we will … not be able to do everything in house. I think that works, I think that's okay. And I think that is what has made it successful as well.*

Working on a cost-recovery model ensures that the Academy behaves professionally and that there is a value attached to the delivery of the service. Abuse through non-attendance, failure to keep an appointment, and so forth, is minimised as immediate follow-up and comprehensive report-back are done.

7.5.4 Customisation

Customising learning materials, interventions and programmes ensures focused targeting on the particular needs of the organisation. Workplace application, which is part of an action-learning approach, also speeds up the learning process.

> Feedback from an executive director:
>
> - focused on Group needs
>
> *… there is a settling in period where the institutions that we used, perhaps didn't fully tailor make the courses to the appropriate levels and the people. But I think as it's evolved particularly over the last two years, the courses have become very focused on Group Five needs. It's focused the people but it also has kept sufficient broadness so that it does give people the benefit of being in the Academy.*

> Feedback from an Academy team manager:
>
> - a unique organisation
>
> *I think the main reason ... for the Academy and the thinking of establishing an Academy was firstly to have in-house training and development, that's number one. And also for customised programmes for the Group. What happened at that stage was the Group had been growing. There had been various business units popping out and one of the things that became a need was for the development of people. Now, what management realised at that stage was that we needed to*

customise training programmes to suit our needs. Because ours is quite a unique organisation, we do unique projects. And in order for us to deliver on these projects we needed to have specific courses that addressed that. And one of the most important things at that stage was to develop core competency courses.

Customising learning materials is usually done with the input of in-house experts. This speeds up implementation time because the content and application have been honed.

Utilising home-grown case studies:

The Academy spent a 1/2 day [with students] dealing with Group Five case studies that will be used by the syndicate groups to prepare project implementation plans for the final block in September.

(Board Report July 2009)

As part of the learning process, students present real projects to senior management as well as to an academic panel. This jointly ensures academic rigour as well as practical implementation.

Before customisation can begin, however, good programme design and learning providers that are flexible and knowledgeable are essential. The result is, hopefully, real and visible benefits in the workplace.

Customisation is further enhanced if there is a review process that incorporates feedback into a continual improvement process.

7.5.5 Continual improvement

Formal and informal feedback is gathered from delegates, line managers, facilitators and other stakeholders. A process is followed on a regular basis to manage feedback and the relevant programme reviews. Feedback is taken seriously, and, if necessary, senior management is consulted to ensure corrective actions are implemented.

Feedback from a business unit managing director:

- constant review and improvement

So, from that point of view I'm very encouraged about ... how the courses have adapted over the years. There has been some flexibility. When it was seen the project management course maybe was not going exactly where it was originally planned, there was no hesitation to be able to step in and refine it. But if you don't start, you can't refine and make it better, and that, that's been a big benefit.

Feedback from an Academy team manager:

- always willing to learn and improve

... but things we do well is – we always go back. We never leave it as being a success factor, we go back and see how can we even learn from our successes and how can we do better. I think that makes it different in the Academy. Not just reaching the success bar but also ensuring that we learn from it.

Acting on feedback:

A corporate induction at Group level has been in the design phase and eventually launched early in 2008 at a hotel. A good deal of constructive feedback was obtained – along with the request that a stronger exco representation be given consideration. Subsequent quarterly corporate inductions have been held and have the full input from exco and senior management.

(Board Report FY 08/09)

Taking cognisance of feedback from participants serves two purposes: firstly to improve programmes and secondly by demonstrating a willingness to listen and to act on input. Further feedback is also encouraged. Relevance and engagement are secured in this manner.

Receiving and acting on feedback to make improvements result in further customising the programme to suit employee needs. This requires a rigorous process as well as an open mind. Benefits are seen when employees express their appreciation of and comment on the value. This then impacts positively on programme support.

7.5.6 On-going support

Senior executive support in an action-learning process validates the learning and links the benefits to the organisation. Networking and mentoring align the thinking of young talent and provide useful exposure.

Senior executive support linked to action learning:

> Each syndicate group had the opportunity to present their Action Learning project proposals to [CEO] and [an Executive Committee member], as well as representatives from [a university]. The feedback was positive and the next round of preparatory work was done for September 2009 to assist the syndicate groups to meet with additional stakeholders as well as with exco members to ensure implementation by October 2009.
>
> (Board Report Sep 2009)

Learning needs to be practised, therefore, space for reflection must be created. Through an action-learning approach, along with the reinforcement of learning aids, such as a portfolio, both practice and reflection take place. Mentors seek to facilitate both these processes, and this benefits both the individual and the organisation.

Action learning and mentor support:

> G5B3 is a junior management programme with a three-month long learning component followed by a three-month portfolio composition component. This programme is in high demand across all business units and is based on action-learning principles (implemented learning in the workplace) as well as on the obligatory support from mentors for the duration of the programme.
>
> (Board Report Sept 2009)

Regular engagement with managers and mentors is structured into some of the longer programmes to ensure workplace implementation and, therefore, a growth in newly learned skills.

The role of the Academy is to request and manage support from various role players. This requires involvement from a number of people in the business, and this involvement creates an expectation and awareness of the various programmes, which in turn places pressure on learners to achieve. In other words – it starts the 'ball rolling'.

7.5.7 Keeping the momentum going

Initiatives that are started are very difficult to keep going if it is in an area that is not your area of focus. Previously, when learning programmes were initiated at business unit level – for example, mentoring – it very rarely led to a second programme. Momentum is quite difficult to achieve without sustained pressure and effort as well as a comprehensive approach.

> Conversation with Academy staff:
>
> - keeping the pressure on
>
> *There [are] other critical things [happening] in the business units. So if there wasn't an Academy in place to kind of say, "These are your figures every month", in a bust cycle it would be a lot easier to take your eye off the training ball. [With the Academy] you have got a body that is constantly and only focusing on that, that provides a constant push .... I don't like the title of being like a 'watch dog', but I do think that that role does inadvertently get played because you push to report. We [the Academy] push to report and so there is constantly that view … "... yes, we are in bad times, yes we've got to watch our finances, but are we spending the 1,5% payroll? Are we spending it in the right place?".*

The approaches discussed in this section, namely: impartiality – serve all equally; coherent, overarching philosophy (systems thinking); centralisation and influencing of approach; customisation; continual improvement; on-going support; and, keeping the momentum going, all require the backing of comprehensive and enabling systems. The following section discusses the need for effective systems.

7.6 The need for systems that work

One of the roles the Academy plays is establishing central systems which provide infrastructure and tools to manage information in a way which is user friendly and meaningful. By using systems to capture and manipulate data it is possible to see emergent trends and use these as a basis for predicting future needs as regards timing and content. This information, as well as discussions with BU leadership, provides a starting point for planning and allocating resources going forward.

Without effective systems in a large organisation, it is impossible to manage the levels of complexity and reporting requirements for daily business, as well as the legislative and sector requirements. The road taken was initially very difficult as there were no learning and development systems in place when the Academy started.

Reflections of a business unit managing director:

- training administration and reporting
That kind of thing fell into disrepair around that same time when the divisional structures fell away. … ... when we started getting really serious about putting in skills development reports ... so this is a very administrative view … our inconsistencies [in administration and reporting] were unbelievable. We just couldn't put it together as a group. As a consequence we kind of started [to take] a strong view to have these things implemented.

A great deal of time and energy was put into researching and searching for the right systems that would integrate with current infrastructure. Utilising an in-house system but accessing additional modules and working with an internal IT team to customise it, meant that this was a sustainable solution for the Academy. It has proved its value on a daily basis and has also provided the stepping stone for expanding the impact and the sphere of influence of the Academy.

Systems and reporting:

PeopleSoft Reporting – Now Live!
For the first time the business is able to draw training and development figures from PeopleSoft. The value of this functionality cannot be overstated – and this began as a project in March 2008 with both the Academy and the PeopleSoft team meeting weekly over the last 16 months. Progress was tediously slow due to the high level of detail required in the various inputs to gain full value and ensure that the system is a useful tool.

(Board Report FY 08/09)

Reflections by an Academy team manager on the road travelled:

- centralisation of reporting, information management and systems

> *I think from a process point of view, I think from a policy point of view, I think the fact that we've expanded to as far as the Construction Skills Training Academy, that we were able to expand the growth of the Academy .... Coming back to processes, policies, systems, ... when we started we were system lacking. We realised the need for centralisation, for proper reporting, for proper record keeping.*

To build and maintain a system requires constant attention, and initially this must be driven centrally. The use of these systems must then deliver results, and these results must be demonstrated constantly to entrench routine behaviours.

Building systems to provide support to the learning and development fraternity and to provide timeous information for reporting is a critical resource. Benefits have been realised across the business as reporting has improved to the point where learning and development practitioners are able to draw reports as needed.

Providing meaningful information with good systems:

> Reflection on the past financial year facilitates a deeper understanding of who we train, when, and how much we spend on different levels and categories. Utilising this understanding it is now possible to more closely target and align training to strategic BU and organisational goals.
>
> (Board Report Oct 10 (Jun 10-Sep 10))

Building competence through the provision of central system tools ensures comprehensive and competent reporting. Ready access to tools which analyse data directly impacts on the ability to manage a large organisation's learning function.

Providing information timeously and accurately impacts on business confidence and also builds credibility externally.

Measuring progress to establish credibility:

> The importance of inputting and tracking data was reinforced many times over. This is relevant to measure progress as well as provide a trail for auditors – for ISO, BEE verification etc. Reporting using data that is trustworthy – establishes credibility at higher levels and also provides leverage to gain access to funding etc.
>
> (Steering Committee Meeting Minutes 270509)

Robust systems that are flexible and able to meet constantly shifting reporting requirements and compliance elements are necessary to support L&D functions. Accurate information that is provided timeously and that adds value to decision-making provides a solid foundation for a corporate academy – particularly in the South African environment where there are stringent but constantly changing guidelines requiring a good deal of finessing of data.

To gain the full value of systems it is necessary to communicate with the relevant role players and stakeholders, and this includes reporting as well as providing general information.

7.7   Effective communication[1]

Marketing was an item on the agenda of the weekly operations meeting for the first five years. Raising organisation-wide visibility through activities that are meaningful to employees was a strategy followed early on. To attract interest in and traffic to our website, a photographic competition (Figure 39) was launched. The competition was open only to employees, and external judges were appointed to ensure legitimacy. Some of these photos were later used in annual reports, and that added to the prestige of the competition. This competition is now an annual initiative and a number of successful iterations have been added. Photos (together with the name of the picture and of the photographer) now decorate the walls of the Academy. We have tried wherever possible to build relationships with employees and have encouraged the feeling that it is 'our Academy'.

The Academy's available programmes, successes, impact on and value contributed to the business must be communicated as widely as possible (see examples in Figure 40) to employees. This is not only to encourage more students to enrol but also to communicate to managers the value of learning and development. Regular contributions are made to the in-company magazine, and the company website is kept up to date with current Academy events.

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[1] Sources for this section were largely operations meeting minutes.

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Figure 39:   Invitation to participate in photographic competition hosted by Academy

The role of the Academy is business support, therefore, knowing what is happening and staying informed allow the Academy to respond appropriately to requests and to implement programmes. A variety of communication tools are used, including:

-   Online training calendars for all employees

Providing information on programmes, content, schedules and venues timeously, and making it easily accessible, is important for planning at business unit level. The contribution of all units leads to feelings of ownership, which in turn creates the likelihood that information will be kept up to date.

-   Central perpetual calendar for L&D representatives

Experiments with the simplest, most user friendly tools are important to establish what works. For the Academy and L&D, a central (perpetual) calendar is kept up to date on the server to prevent confusion about resources, such as training venues and equipment, and also to keep track of individuals and their responsibilities. It also encourages planning ahead to secure the best resources.

-   Customised (and standardised) flyers to advertise key programmes and workshops

Campaigns advertising key programmes and workshops are launched: the advertisements contain a brief description and information on the target market, the dates and the venue. Flyers in a similar format (so that they look 'familiar') are

distributed, and these aim to answer key questions. The flyers are intended to prompt individuals to follow up with their L&D departments.
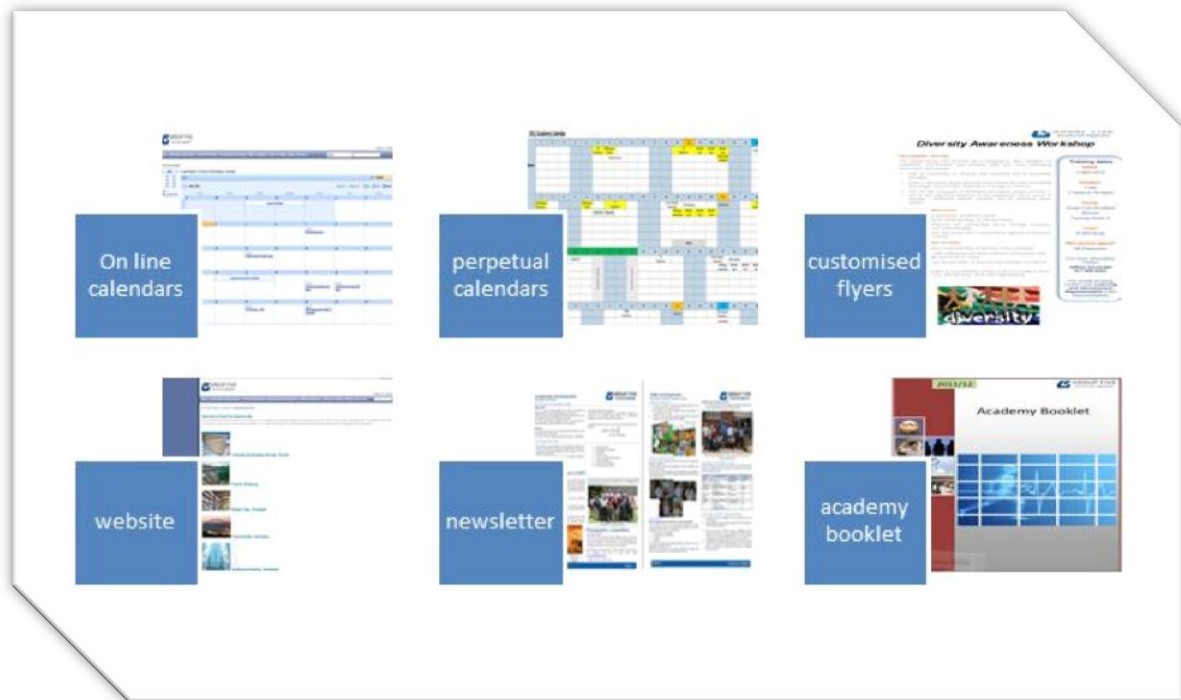
Figure 40:   Examples of communication tools used

- Website

On the landing page of the intranet, an 'Academy' button on the top menu bar means that easy access to the Academy is possible. In addition to that, the Academy has its own website that has been carefully designed by team members to ensure that information is easy to find and succinct enough to be interesting.

The Academy's approach is that the right information must be given at the right time and in the most useful format.

- Academy Newsletter

A monthly newsletter, with contributions from most members of the team, is prepared. This newsletter serves to inform, update and advertise, as well as to communicate the team spirit through some fun elements.

- Presentations, certification ceremonies and graduations

All opportunities in regard to the above are exploited, but as spartanly as possible, to ensure that as broad as possible an audience is reached and to encourage a sense of 'ownership' of learning in the organisation.

- Academy booklet

A comprehensive list of Academy programmes is given in a 'directory' booklet. This is available online, and printed copies are left in the central area outside the training classrooms.

- Marketing plan

A comprehensive marketing plan is put in place and implemented consistently. Different methods and approaches are used based on needs and logistics. Teams take different approaches depending on who their target market is.

- Reporting regularly in a structured manner

Regular reports are drawn up for key stakeholders. These are important to gain credibility and trust and to lead ultimately to the allocation of further resources to do further training and development.

Communication on different levels is absolutely essential to ensure a steady flow of information and to reach all stakeholders. Communication from stakeholders helps the Academy team to understand needs, and to mobilise and align these to strategic business needs.

7.8   Delivery to be in line with organisational strategy

7.8.1   A fundamental focus – alignment to strategy

The Academy has a good team that puts a lot of effort into winning stakeholder support. Effective approaches and systems are enhanced by a good communication plan. Nevertheless, the Academy would not be effective at driving learning in the organisation if it did not deliver in line with organisational strategy. Therefore, this is a fundamental focus.

In practice what does this mean? Discussions with stakeholders brought a number of aspects to the fore: *bottom line, one-stop shop, networking culture, building competence, change* and *innovation*. This section discusses these aspects in more detail.

Broadly speaking, the original intention of the Academy was to align training across the Group, provide a central knowledge hub and serve as a centre of excellence of operational training.

> Feedback from an executive board member:
>
> -   growth and purpose of the Academy
>
> *So what's the outcome? People [were] quite sceptical in the early days and then as [the Academy] began to have really good outputs … one started then to get a lot more demand for the services of the Academy. So I think you then got migration of people [from] doing their own thing, which in this complex organisation – it's lots of training and things going on – but so fragmented and disorganised. You started to get progressive buy-in and so now I see the … curriculum has become incredibly broad, and becoming very operationally orientated, which was the original need – the need to have some retention of knowledge in the organisation. So we began with executive training but the idea was to get operational knowledge ... in other words, it became a basis for the receptacle of knowledge of how we do things in Group Five. And, I think, as you [have] broadened the curriculum, that has now been developed, so we go right from … People at the Gate' stuff as we said, right through to MBAs. So we have been on a long journey and it's not been easy, I'm aware of that.*

Government funding for learning initiatives is focused on broader economic needs, which are not always aligned with organisational needs. Therefore, various avenues must be explored to find a middle ground.

Balancing organisational focus with government's drive:

> The focus of the Minister of Education (per Nov 10 announcement) for the foreseeable future will be on artisan skills – which has implications for learnerships and apprenticeships. Funding from SETAs will be in alignment with this drive. Concerns for Group Five are that any and all training done, needs to be in alignment with the strategy and workplace requirements of the organisation – balancing government's drive with organisational need must be approached with careful consideration.
>
> (Board Report Jul-Dec 10)

Finding a middle ground requires a good understanding of the business and then finding ways to link this with governmental and SETA priorities in order to achieve a win-win situation. An example of a middle ground that has been found is the establishment of a basic construction skills academy (Figure 41) to develop entry-

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level skills, thus meeting governmental and SETA requirements as well as developing the skills of our subcontractors.

Figure 41:   Construction Skills Training Academy started under auspices of Group Five with funding assistance from Development Bank of South Africa

7.8.2   Bottom line

For people development to become part of the culture of the company, a clear link between cost and benefit must be seen by management.   The early adopter business unit in the Group made the connection rapidly and actually pushed the Academy to deliver a greater range of programmes.   The employees in this business unit are younger and they work on remote sites across the border in Africa. They seem to be more open about the need for learning as they have to rely more heavily on competence and skills.

Feedback from managing director of early adopter business unit:

-        benefits to bottom line

The benefit is massive. And look, it's not a hundred per cent, nothing we do is a hundred per cent but has it contributed to our bottom line? Yes. And ultimately that is the final measure.

From my own perspective, if we didn't have the Academy – would I have been driven to spend the money? Probably not. But the upside is, I've seen the spend, but I've seen the benefit. Major

The management of this business unit is uncompromising in their support of training, and they are equally clear on the outcomes they want to see, which put equal pressure on the Academy and on the learners.

7.8.3 One-stop shop

A discussion with an HR director regarding training needs and the impact of people development in the workplace indicated that the Academy influenced culture and played a role in aspects of transformation in the business unit and in the Group as a whole.

Comment by the HR director:

- playing a transformational role

… and that's where I see the Academy role has changed from a creator of training structure or training model for the Group to one of maybe driving culture and change more, which is a more transformational role.

This comment briefly touches on the scope and the ground that the Academy has covered and the way it has evolved in recent years.

Group-wide annual 'climate' survey results are usually shared with the L&D Forum and examined for areas where training and development interventions would provide direct benefits to address issues identified in the survey. Providing pro-active support for corporate challenges embeds the relevance of the Academy.

Using survey results to identify problem areas in the business:

The impact of picking up on specific areas of need informed by more than just line manager input means that a more holistic approach to people development is taken. The survey is an important monitor of large areas of need.

Key challenges faced in the sector with respect to people competence are firstly a shortage of skills and secondly an age gap with baby-boomers on the one hand and generation X&Y people on the other hand who are relative newcomers to the industry. The ratio of the older professionals compared to the younger generations means that it does not allow for learning to take place as it did 'in the old days'. New solutions are imperative.

An HR director comments below on alignment of a spectrum of training and the impact of the drive from the CEO to create a 'one company' mind-set from a number of different entities and at the same time to develop younger employees and align them to 'the Group Five way'.

Comment from an HR director:

- Group Five Way

[The CEO], I think, became aware of … [this] gap in terms of how do we train these people in Group Five specifics of management, leadership and commercial and technical ... not so much the technical, certainly the other aspects ... management, leadership, commercial training. So, as a result of that initial thing, together with, at that point in time, a greater oneness among Group Five. Because that was also where each business unit was doing its own approach to things. And the Academy therefore had a twofold reason …. One is a one-stop training institute to get all this young talent and develop them in a consistent Group Five way. And number two, I also think the Academy was there to further assist, which was ... must have been a key exco strategy at that point in time to create commonality amongst Group Five business units. So that was almost a way to influence the culture from an Academy point of view. Because what you are going to have now is all these youngsters from all these various business units, and what better way to get the culture of oneness than in this

A constant awareness of the Group's strategy allows for a flexible approach when changes in the environment impact on strategy. At the same time, on-going alignment and support of Group strategy is essential to ensure Academy relevance.

Tracking the Group strategy:

Vision remains the same but we need to move cross border for work – Academy needs to determine how this would work for training and development.

(Academy Operations Meeting Minutes 070611)

A central structure to co-ordinate learning and development across the Group has the benefit of having a clear strategic direction based on business-specific needs that meets the high expectations of employees. The central structure ensures one approach to training and development.

7.8.3.1   Academy must be a flexible business partner

The Academy team must have competence in designing and delivering learning programmes but it must also understand and work with individual business units to match the learning to the specific need. Often programmes can be adapted by using appropriate and business unit specific examples. For example, our one business unit works across the border in Africa, and the Corporate Governance and Ethics workshop held with this unit resulted in robust discussions on the interface between corruption and the safety of employees. Learning must at all times be 'real' rather than idealistic. Learners quickly disengage if relevance is lacking.

Focus group discussion on the need for a flexible approach:

-        flexibility sums it up for me

You know, our needs are different to [business unit] needs, and [business unit] needs are different to [business unit] needs, so although we are drawing out of the same pool of interests, we require a slightly different service. So, when you say to be flexible, I really think that word is really, really

Working with business to understand where the challenges are in the real world of work, helps prevent costly programme design which misses the nub of the real problem. The intention is to make a real difference.

A previous student comments:

- quality of programmes

It's a huge thing. Because the quality of the courses that are given to our people, and I've listed them all here, contributes to the people that run our business and it's massive. I mean, if you take someone who is a contracts manager and they didn't know, for instance, how to do financial accounting or read a report or whatever the case is, then you battle as a QS to actually then read it.

One aspect of being a 'one-stop shop' is the design of programmes. The Group Five approach to learning and development is based on systems thinking that has an action-learning orientation. A direct objective of this is to achieve, where possible, a change in behaviour – and this is most easily achieved by customising the design to more closely align to the systems-thinking philosophy.

7.8.3.2   Customise and organise

An aspect of the original reason for establishing the Academy was to meet the Group's specific needs – as the construction industry has very specific needs due to the project nature of the business and the constantly shifting employee and team location and team composition.

The need for in-house capacity to focus on particular Group needs is emphasised by an executive director and managing director:

- focus on our needs

But I would also put it at a time when it was becoming difficult to ... [do] two things; difficult to support the training of people using external service providers was the one, and the other was that it was difficult to find quality service providers. So, I think, (a) there probably weren't enough of them [service providers], or they weren't offering exactly what we wanted or we don't think they did it well enough. And probably of the lot, I would say the most important reason was actually they weren't giving us what we were looking for. And I suppose you could say that we have particular requirements that are not necessarily ordinarily available. So I guess we tried various service providers, decided this wasn't quite what we were looking for, so maybe someone in-house could manage it better, arrange it better, co-ordinate better and then start to offer us a broader spectrum of courses.

Then you need to hone into, 'what do we require [as a business]'? Because we are really an Academy training people for ourselves. We are not training for other businesses, so it has to be related to our business or at least [to] our industry.

Engagement with the provider (including provider and faculty briefings) early in the process to ensure comprehensive input of a very specific nature related to the Group's needs and material oriented to our specific requirements, is done to provide company-specific examples, case studies and metrics to illustrate the particular learning focus. Wrap-around blocks or opportunities to incorporate our own internal SMEs or senior management further speed up the learning and enhance implementation as they link directly with adult learning principles – most important of which is seeing relevance in what is being taught.

The role of customisation to meet specific customer needs not only impacts directly on learner 'speed to implementation' but also, over a period of time through critical mass, begins to impact on the culture of the organisation.

Designing in conjunction with SMEs:

The Academy piloted another new intervention in September, this time focusing on another need in the Group i.e. understanding and dealing with diversity more effectively. This course has been designed in conjunction with Group HR to address the all-important need of diversity management. Two courses were delivered with a total of 102 persons having attended in September and November respectively.
....

Action learning is a non-negotiable approach to all programme design and implementation. In many programmes there is a project or portfolio which requires the support of a mentor – this is incorporated into the programme design. A principle of action learning is the encouragement of reflection after implementation which increases the chances of sustainable behaviour change.

Consideration of the impact of learning and learners in the work environment is part of the planning that takes place before the launch of an initiative. In some instances a great deal of pre-work is required (such as ensuring physical access) but, for the most part, mentoring programmes and top management support are the most important.

Thorough preparation and planning in advance:

Learners on the Business Administration Learnership course for people with disability launched with good business preparation in advance, which included aspects such as extensive formal inspections on work location accessibility as well as disability awareness sessions for employees. The first class is shown below in Figure 42.

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Customisation facilitates transfer of learning through a clear linkage to relevance, which is reinforced by the engagement of senior management in the role of mentors, guest speakers or subject matter experts. Networking is also supported by senior management to assist students to attain curriculum goals.

Figure 42: Attendees of Administration Learnership for unemployed disabled learners photographed with management and Academy representatives

7.8.4 Encouraging a networking culture

A focus of the Academy is encouraging a networking culture, and this is achieved in a number of ways. On all longer programmes, students are selected from different business units, and in syndicate groups there is a similar approach. Benefits are starting to become visible even to senior management.

Feedback from two managing directors:

- create a united organisation through relationships

One of our strategies is to have the people to support the business. And I think that's what it [the Academy] does – it helps us to develop people to support the business. If we also say that one of our strategies is the development of a single business rather than a group of separate businesses. We've spoken about it earlier, it's helping to break down those barriers, so I think it's adding value there as

well. So it contributes to that strategy and I think it is a strategy of trying to create a united Group. … So yes, it's about people with the right skills, ready at the right time and, yes, and then drawing everyone together to work together.

I think from a management perspective … the Academy has … assisted Group Five's culture more than anything else because of the network. So, outside of just the learning environment, the networking is huge. I mean, I can see it. I could see it with our guys interacting with guys from other business units which certainly wasn't the case pre-2006. Probably ... there [were] elements of it, but again it was in the learning environment that that came about.

The nature of the learning on programmes and the focus on action learning as a methodology ensure that levels of engagement between students are not just superficial. Implementation of learning requires a good grasp of current practice and then the exploration and visualisation of potential new practices in the workplace.

Networking takes place at higher levels on many programmes. In some instances, mentors assume the role of networkers, and, in other instances, opportunities are created for senior management to play the role of a guest speaker. Programme launches, presentations and graduations are opportunities for management and students to meet and engage.

7.8.5 Building competence

An essential aspect of delivering on our strategy is having competent people to do the work. Construction is a labour-intensive industry which requires high levels of technical knowledge, project management abilities, as well as leadership and management skills. In addition, the spread of skills across generations is uneven due to the cyclical nature of the industry. We thus have a 'baby boomer' generation of engineers and a considerable influx of relative newcomers.

Reflections of an HR director:

- accelerating the development of young people

… we started back in 2006 at [our business unit]. ... ... we are now sitting with such a wide spread [of business opportunities] in Africa, and our biggest challenge as a business unit is, because there [are]

so few [experienced] people, we are throwing massive opportunities at very young people and therefore they need that formal classroom training, that just expedites their exposure and their thinking and their knowledge – that ten years in the field is never going to get to. So, the contribution is firstly accelerating the development of our youngsters. Secondly it's keeping our people motivated because no one wants to be sitting in one place and not progressing. And that's a very important by-line for the Academy.

… So definitely it's about the newness, it's about reinventing people and, you know, the stuff you guys are doing now with e-learning. I've become exposed to it with that Black Economic Empowerment workshop for the first time where we had to do the course the day before. I mean that was brilliant. That was really brilliant.

So, our strategy is around youngsters and that's where the Academy comes in, because you are able to accelerate their development more than any other courses or interventions can do.

Example given by an HR director:

- Building competence through the right learning programmes

I'll give you a classic example; in my department I've got a lady that has just been sitting around the last five years since I've been here (2006) just doing the same thing. And out of sheer desperation I sent her to the G5B3 and she's come back transformed because now she understands why the twenty other people who started when she started are now contracts managers and site managers, etc. Why? Because they took the opportunities given to them and they are doing a lot more. You can't be given greater opportunities if you are doing the same thing, and G5B3 opened their eyes for them to understand that life is about 'what you put in is what you get out'. You can't be sitting and expecting to get without giving, and G5B3 was amazing in that regard.

A significant risk in all organisations, and particularly in the construction industry, lies in compliance with legislation, whether this relates to labour regulations, competition law, contract law or the myriad of other legislative requirements. The role of the Academy is to assist in supporting the implementation and application of new legislation or recommended guidelines. This is done in conjunction with the relevant SME where applicable. Critical information on changing legislation is disseminated throughout the Group through frequently conducted compulsory sessions which are measured, tracked and recorded.

Careful selection of programmes is necessary to ensure that the right information, context and tools are provided, and that these are in alignment with strategic needs and are cognisant of compliance risks – never forgetting that all initiatives impact on the culture of the organisation in some measure.

Building relevant legislative competence across the Group:

Competition Law Seminars have commenced with roll out to all business unit management.

(Ops250609 and Ops 080509)

In response to a newsflash from exco (May 2009) based on legislation on competition in the sector, a systematic process of raising awareness was initiated by the group legal division for all employees on Peromnes level 8 and upwards.

(Board Report Oct 2009)

Legal compliance is not optional, and providing support to the organisation to achieve alignment is a necessary Academy contribution.

Customising courses to meet required compliance:

Employment equity

After a good deal of collective research, a course was customised to meet our organisational readiness level and needs, was chosen…. Application is even more appropriate in this space as the EE committees strive to fulfil their roles and responsibilities as effectively as possible.

(Board Report Jul-Dec 10)

Being aware of developments in the organisational environment and incorporating these into the learning curriculum for employees is a function of the Academy.

Staying in touch with new developments:

The newly launched King III covers various business best practices, including corporate citizenship, audit committees, risk management, internal audits, integrated sustainability reporting and disclosure as well as compliance with laws.

….

A King III workshop was conducted on 29 September 2009 and 25 directors attended. The next session is scheduled for 18 November.

(Board Report Oct 2009)

Technical expertise is our core competence, and this requires constant augmentation to ensure competitive advantage: establishing a baseline for competence and then providing the tools for development provide real visible value back into the organisation.

Building core competence:

> The Academy's core objective with this programme [PPM] is to establish a foundation and benchmark project management skills across all business units. Approximately 50 learners will be equipped with project management skills in the first year to more effectively manage multi-disciplinary projects and provide professional support in the bigger projects.
>
> (Board Report FY 06/07)

The professional registration of engineers is a core business aspiration, and by taking the lead in this, the Academy addresses a key need in the business. Registration for new candidates takes a minimum of three years, and thus a sustained approach is necessary. A mentoring programme has been running for a number of years and although progress has been slow it is now an essential part of the technical competence ladder of learning.

Professionalising core competences:

> [Academy] to sit with HR to get the names of the engineers. Send out advertisements and put together a checklist.
>
> (Academy Operations Meeting Minutes 090508)

Part of the role of the Academy is to comply with and support national initiatives. This has benefits for the organisation and for the individual. The relevant accreditation or recognition is pursued – for example, our Constructions Skills Training Academy is accredited by the Construction SETA.

In addition to this, a number of our workshops carry Continuing Professional Development (CPD) points which are required to support continued validity of the professional registration of engineers, construction managers, quantity surveyors and project managers. This makes our programmes more attractive and relevant.

Talent development and retention:

To deliver on current people strategy needs is usually a reasonable target, however, the constant evolution of our business environment requires a flexible approach. Competition in the industry and the rapid rate of change put pressure on the Academy to find new ways of delivering in alignment with the future needs of the Group.

7.8.6   The Academy's role in supporting change in the organisation

Change in organisations is inevitable, whether it is internal systems that need to be replaced or whether it is a major initiative, such as the acquisition and integration of a new company or the roll-out of a new organisational structure. Group Five is no different. The role played by the Academy is usually pro-actively determined to facilitate a smooth transition.

Feedback from a business unit managing director:

-       Academy's supporting role

I think the role that … the Academy does play is that when the company changes direction, you know that there is someone to rely on to actually help guide you in that way.

Reflections from an Academy manager:

-       being a change agent

You know, my viewpoint on that as being not only a training Academy but being a change agent for the organisation. And how we influence the organisation by using mechanisms of training and mechanisms of development to [support] change in the organisation.

Consulting widely on important new initiatives involving substantial change is required for a consistent and lasting impact. Gathering information in advance and

engaging with stakeholders are important to manage change and the 'not invented here' resistance mentality. Encouraging a structured roll-out plan with a more 'sharing and engaging' than 'telling' approach so as to provide the space for input, questions and debate is an important Academy contribution.

The right channels at the right time may mean a slow start but a solid foundation. Whilst initially slow, this approach usually results in a much faster and more widespread uptake.

7.8.7   Innovation

Looking broadly across the organisation, room for innovation to manage particular challenges or opportunities is required. This is achieved through conversations with site management and an on-going scanning of and comparison with strategic goals.

Problems brainstormed lead to unusual solutions. An industry first is that university and technicon students in their first bursary year with the Group are expected to attend a mid-year, two-week, wet-trade skills training programme. This familiarises them with their future profession and it also builds a network which takes them through university and into the workplace. This programme has received extensive recognition.

Programme innovation – new solutions to old problems:

> Student Boot Camp starts on 17 June 2008.
>
> (Academy Operations Meeting Minutes 130608)

Summer camp (Figure 43) takes place at the end of students' final year of study in the December vacation period. It integrates bursary students into the organisation and settles them into their first permanent employment. Team activities and networking help them to form friendships before they go into separate business units. The result is that they start with the concept of one organisation instead of a multiplicity of business units. The friendships also stand them in good stead for the future.

Building fun into learning and networking:

All final year students will be invited to attend the Summer Camp in December 2009. The purpose of the camp is to prepare students for permanent employment.

(Board Report Sept 2009)

Figure 43: Summer camp activities

The Group Five junior management programme provides solid basic business skills and makes a valuable contribution to the individual as well as to the organisation. A 'movie' is made of interviews with students and their line managers on completion of the programme - to ''prove' the value of the programme as well as to reflect on the fun enjoyed on the programme. The movie also helps to directly market the programme to senior and line managers. This movie is flighted at graduation, which is attended by successful learners, line managers and senior management. It reinforces what learners have experienced and allows them to see how others feel about the programme. An element of fun in the movie reflects the spirit of the programme, which is all about learning fresh new skills.

Innovative ways to market the Academy:

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> G5B3 – putting together [Cape Town] movie.
>
> KZN – about 20 nominations for start [of new programme] in August. Jhb 7 due to start in August.
>
> <div align="right">(Academy Operations Meeting Minutes 020710)</div>

Academy staff are given leeway to find innovative approaches to challenges experienced. The result is frequently a very cost-effective solution with a great return. Ownership of the problem and the solution provides a sense of satisfaction and excitement about the innovation. One of these innovations is the annual student day (Figure 44) which is well supported by the business.

Figure 44:   Final- and first-year Group Five bursary students at the annual Student Day

7.8.8   Business partner

To establish credibility and also to meet an immediate need, attention was given to technical programmes in the first year. These programmes have formed the backbone of what the Academy offers in the technical stream. Early on, customisation and the use of in-house facilitators ensured relevance and accessibility.

On the basis of a more credible profile, the Academy has grown to become a business partner and contributes across a wide range of business aspects. One of these is assisting with increasingly onerous skills components which are part of the tendering process.

An employee and former Academy student from our Programme in Management Development (PMD) notes:

- assisting with tender inputs

I mean, the one thing that I do know and I know that it happens, because you have helped us in the past, is that you also, on the big tenders where we do need to ... and I'm specifically referring to Eskom with their accelerated share growth initiative which is [part of] ASGISA. You guys helped us a lot when we put in our [big project] bid. And that really did help.

Insight into the needs – the real needs in the workplace – is an essential starting point. This is achieved by being in contact with those who are feeling the pain of inadequate skills or competence. The role of the Academy is to access the information and to co-ordinate an approach to meet the needs effectively and to implement the project through to its conclusion. This role was clear from the outset and continues to hold true going into the future.

Constant awareness of business challenges:

Considerations for the Group Five Academy going forward include the need to be responsive to organisational needs, to work in partnership with the business units to find learning initiatives that lean towards life-long learning and to ensure that discussions and dialogue keep the Academy forward thinking and relevant within the greater context. Programmes and learning initiatives need to be fit for purpose and deliver real value back into the business – value assessed regularly and impartially.

(Board Report FY 06/07)

External environmental factors in the wider South African economic context have a direct impact on Group Five, resulting in a constant finessing of the Group's strategy. The Academy must keep track of changes in focus and emphasis, and must be prepared to support the various businesses. This can only be done if there is a flow of information from leadership to the Academy, and if the Academy in turn feeds reporting and progress reports back to senior leader forums.

7.9   Conclusion to the chapter

The manner in which the Academy drives learning in the organisation is wide-ranging, as are the related behaviours that the individuals in the Academy demonstrate. In summary, as described in this chapter, these behaviours include acting to ensure that there is a clear link from the organisational strategy to the learning and development that is conducted, this link is the insights gained from organisational leadership]. Professional behaviour in running the Academy and in the way in which the programmes are delivered is required. Learning programmes that address real business needs and technical proficiency standards must be delivered consistently with the right level of customisation, relevance and appeal Regular and comprehensive communication through all mediums and channels is important to maintain a high profile of the Academy in the business – whether through reporting, newsletters, emails or face-to-face visits. Finally, ensuring that leadership is included in the learning cycle is important, whether in the planning and design, the implementation or the review and improvement.

With the right team, the Academy can mobilise a learning orientation through effective approaches, systems and communication, but without stakeholder support it would be difficult to achieve success.   Key organisational leaders are fundamentally important to the Academy, along with HR and Learning and Development officers – all parties have a role to play in driving learning in Group Five. In the next chapter the individual as recipient and beneficiary is discussed, followed by the role played by the key stakeholders.

Researcher's reflexivity points:

Project management expertise

To build the ability of the team to multitask and deliver multiple programmes consistently, I initiated a focus on mapping of all processes and insisted on detailed checklists for programme phases. This meant that we had all contributed to building the process flows and that we knew what should be done. Regular progress meetings were held – always with a checklist nearby. A mantra over the years was '80% of the work needs to be done before the programme starts because **planning** is responsible for 80% of the programme success.' This saved us from rushing in unprepared, or not getting the right learners in the classroom.

All formal Academy meetings were minuted, and in the informal meetings, team members were encouraged to take comprehensive notes. In the weekly Academy Operations meetings, the roles of minute taker and chairperson were rotated.

Working as a team

Good teamwork was given recognition through small rewards, such as an afternoon off, and this resulted in sharing of workloads in times of high pressure, and it also strengthened relationships. In any team there are clashes, and a number of lessons were learned – the most important being 'deal with the issue and don't let it fester'. The Academy became recognised widely as being a really strong, energetic and focused team. This resulted in us winning the annual CEO Team award which was presented in front of about 300 of the most senior members of the business – a really amazing honour, more so since this award is traditionally presented to site-based teams.

Communication – team and business

A comprehensive marketing strategy is essential - a lesson learned early on. Keeping the team informed of feedback from all relevant meetings that I had attended, was done at the weekly Academy Operations meeting (the first item on the weekly agenda). By being informed, the team was able to target communications where it was most effective. For example, news of a new project being awarded to a particular business unit meant that we could support it with the particular skills training required.

I also encouraged Academy team members to sit on committees and forums (e.g. Communications Forum, Safety Committee, Social Committee and Employment Equity Forum) as it would enhance their knowledge of the organisation and their networking.

8 THEME 4: INDIVIDUAL AS A RECIPIENT AND BENEFICIARY

8.1 Introduction to the fourth theme: Individual as a recipient and beneficiary

Learning begins with an individual as both the recipient and the beneficiary. It is up to the organisation collectively to take this beginning and provide a framework which ensures sustainability of both the learning process and the learner's learning mind-set. Learning is catalysed by the context in which the organisation and the individual are, and along with the support of organisational leadership, line managers, learning and development officers as well as, in this case, an academy, the culture is influenced by the collective learning that takes place. Figure 45 below indicates the interplay of the various elements that provide the support and pressure for the individual to pursue learning.

The three main role players in the individual's world of learning are the line manager, the L&D officer and the Academy. The same message must come from all parties, and a consistent approach to development for all learners must be in place. The ultimate intention is to create a culture of learning.

In this chapter the individual learner is discussed from a learning perspective in the world of work; how the individual experiences learning taking place; communications regarding learning interventions; managers' support of learning; and the benefits the learner derives.

```
┌──────────────┐
│ Line managers│
└──────────────┘
                    creates a learning friendly
                          environment for

┌──────────────┐                                ┌──────────────┐                        ┌──────────────┐
│ Academy has a│                                │ Individual as│                        │ Culture as the│
│ key role in  │      provides                  │ recipient and│   through critical     │ normative domain│
│ driving learning│  learning avenues           │ beneficiary  │   mass determines      │              │
│ in the       │    and support to             └──────────────┘                        └──────────────┘
│ organisation │
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┌──────────────┐                    liaise with and
│ Learning and │                        support
│ development  │
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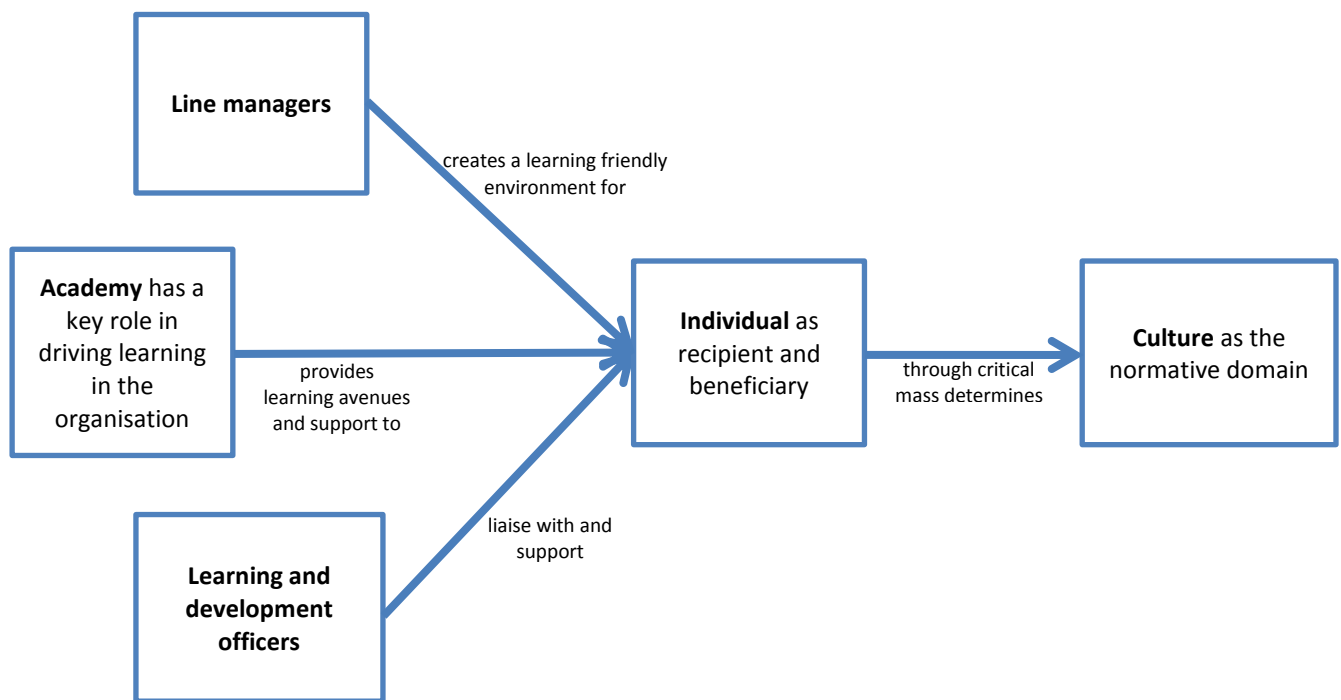
Figure 45:   Causal relationships interfacing with individual learner

8.2   What the individual sees

On joining the organisation there are a number of things that become apparent to the employee in a short space of time.   Firstly the new recruit attends inductions at business unit and corporate levels.   At the corporate induction the first hour is facilitated by the Executive Committee team, which include the CEO and CFO, and it is followed by input from various SMEs in the organisation.   The session closes with an introduction to and input by the Academy team.

Part of the induction, and also what the new employee will see at business unit level, is the pipeline of learning that is offered from the lower levels upward, and also the range of learning from pre-employment across the various avenues of learning. Learning is offered in a number of different formats – from one-day workshops through to programmes lasting over a year.   E-learning is also available for learners via the intranet and the Academy website.   Figure 46 below is a summary of these aspects.

In the workplace, the individual will also be exposed to colleagues going on a variety of training and will be made aware of the support that the manager and the mentor provides. Though this support is dependent to a large degree on the individual manager and the learning culture of the business unit, there is sufficient support across the organisation for the individual to be exposed to a positive impression of the learning culture. All MDs participate in learning events, from attending presentations and graduations to giving presentations themselves to student groups.

Figure 46: What an individual sees on joining the organisation

The L&D officers are the learning interface at business unit level and they provide information, process nomination forms, and manage learning events in conjunction with the Academy. HR follows up on processes and at a higher level they engage with management and the Academy to ensure organisational goals are met.

Individuals are made aware of the activities of the Academy and of those on learning programmes through the intranet and monthly newsletters. Over a period of time the individuals will get beyond just seeing learning events and learning support and will be exposed to learning themselves.

The model that was compiled in the early days of the commencement of the Academy indicates the holistic approach taken from the outset to integrate learning across all levels. See Figure 47 below.
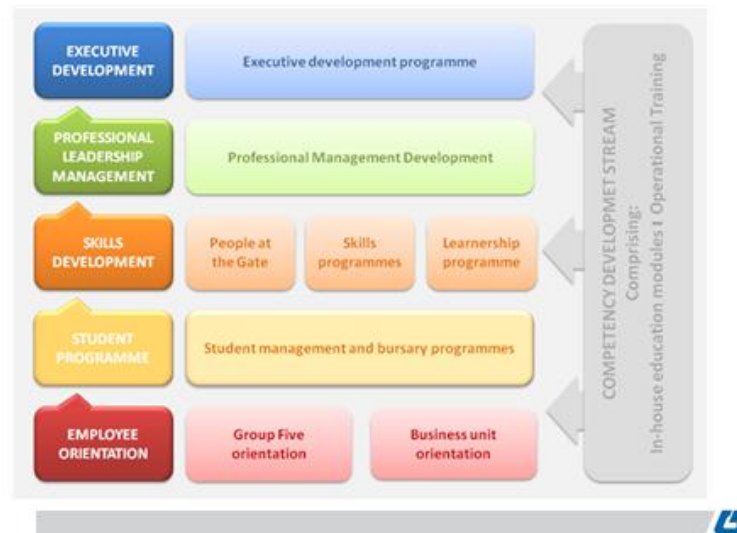
Figure 47: Early conception of the extent of the Academy's scope

8.3 Perspectives – what learners experience

Different learners have different experiences of learning, depending on their level and area of expertise on joining the organisation. A synopsis of learners that were identified in the early days of the establishment of the Academy is indicated in Table 28 below.

Table 28: Identification of learners

Learner identification	Programmes or initiatives	Learners
Skills development	People at the Gate Skills development programmes Learnerships	Learners include unemployed as well as permanent employees.
Student bursary programme	University students	Learners are funded from second year onwards and are given access to regular vacation work.
Employee orientation	Corporate induction	Business induction is for new employees in the organisation.

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	BU induction Student 'Boot Camp' and 'Summer Camp'	Students undergo boot camp as in initiation into the construction industry.
Competency development	Diverse capacity building workshops, and development of fundamental business competencies	Workshops meet needs expressed by the company across a broad range of both technical and leadership aspects. IT training includes all software programmes and packages used in-house.
Technical and professional development	Project Management Graduate Engineer Mentoring Programme Diverse technical workshops	Learners are employees with a talent and desire to learn and expand their technical competence in direct relation to the Group Five Way.
Leadership and management development	Junior to executive management development Diverse leadership and management workshops	Learners are employees at all levels.

An indication of *what learners experience* is viewed from the perspectives of three groups of learners (Figure 48).

Unemployed

People at the gate, skills programmes, learnerships, 'face of the academy', managers to attend graduations

Students

Boot camp, summer camp, student day, career fairs, support whilst studying with extra tutors, vacation work, mixing with peers from different universities, establishing networks prior to commencing employment, welcoming 'face' of the Academy, introduction to construction skills, introduction to management (visible support of managers attending student presentations)

Employees

Induction programme (BU and corporate), e-learning, programmes at different levels, range of programmes, communication via newsletter, work-based learning, learning matched to actual needs which provide benefits realised in the workplace, mixing with peers across BUs, support and active contribution from managers and senior managers (sit on panels, act as guest speakers), support from managers (attend graduations and presentations)

Figure 48:   Learning events and engagement for different 'audiences'

Different levels and groups of people are targeted for different learning events. An example of the different audiences is indicated very broadly above. The first group is from the unemployed communities in rural areas where many of the Group's projects are located (dams, roads, bridges, pipelines etc.). People arrive at the site and request employment. Skills programmes are set up to provide entry-level skills, and

these skills contribute to the success of the project. Management actively support these programmes. A programme cohort receiving certificates is depicted in Figure 49 below.

Figure 49:   People-at-the-Gate learners celebrating new skills learned

Another example is the bursary programme for university students where a number of innovative initiatives have been established. To begin with, BU management is involved in the selection of bursars to ensure that there is 'ownership' of the incumbent when they arrive on site for vacation work and then ultimately for employment. Students are also expected to attend a boot camp (Figure 50) that teaches construction skills such as bricklaying, plastering and shuttering – skills that they will never engage in on site as they will enter the organisation at a 'junior management' level. The purpose of this programme is to give students an appreciation of the hard and difficult labour involved and, hopefully, to make them better managers in the future. At the same time students get to meet bursars from other universities and begin to establish a network which will stand them in good stead when entering the organisation on completion of their studies. Other support is also given to students, which is a combination of BU support and Academy support.

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A final example is the experiences of the employee. After the induction programme the learner will briefly be exposed to the range of learning via the Academy newsletter which is circulated to all employees monthly. This newsletter is light-hearted, colourful and informative. It advertises upcoming programmes, the bursary programme, learnerships, skills programmes, e-learning and general feedback from current programmes.

Figure 50:   Bursary students at Boot Camp

When attending programmes, the employee will experience the support and active contribution from management and will undergo the ordeal of making presentations to senior management (Figure 51). They will also see their managers attend learning programmes and events.

Learning, when it reaches a critical mass, impacts on behaviour and creates a common language and a way of behaving.

Figure 51:   Learners' experiences

8.3.1   The way we do things around here

In addition to building individual competence, a common language and a Group norm are provided through the presentation of a 'curriculum' of workshops for all leaders in the Group. In this way the organisation as a whole is raised to a new level and the organisational culture is influenced.

> The concept of a Management Fundamentals series is being built – which includes mandatory and optional workshops. The 'curriculum' of workshops is emerging and being tested.
>
> …
>
> Situational Leadership has been identified as a key competence in Group Five's leadership development strategy. The programme is being rolled out to all middle and senior management levels, having begun with executive management leading the way.
>
> (Board Report Sept 2009)

The holistic notion is to create 'one company' with an overarching approach to doing things, in terms of ethics, behaviour and culture. People are the organisation, and how they behave has an impact on the overall culture of the organisation, therefore, seeking to influence in the early stages of employment establishes a relationship as well as increases chances of early engagement.

> The specific purpose is to induct employees into the history and strategy of the organisation and establish from the outset a professional environment to address conceptualisations of the corporate brand and operational intent. This process is intended to align both behaviour and performance in a manner which has a significant impact for the individual and the organisation.
>
> (Board Report FY 06/07)

Exposure to management and other employees further entrenches behaviour.

8.3.2 Networking with senior management

Young leaders need exposure to senior management in order to grow, and senior management need to stay in touch with what the existing learning needs are at junior levels (and possibly learn something themselves). Programmes run by the Academy incorporate networking with management as part of their design. Whether it is management acting as guest speakers, or SMEs acting as mentors, this interaction is included wherever possible.

> This programme also includes networking with senior members of the organisation on a regular basis to encourage the transfer of knowledge and culture – this is largely accomplished through customised 'wrap-around' sessions designed by the Academy and strongly supported by the business.
>
> (Board Report FY 06/07)

All these opportunities are given to the employee – it is then up to the employee to grasp the opportunities provided and to apply learning to grow their careers.

8.4 What does the employee do with the learning?

Firstly the learners need to be willing to learn and their attitude towards learning must be right. They must expect, and they need to see, a benefit to learning. Learning needs to be used to experience this benefit, that is, it needs to be internalised, it needs to cause a mental shift to take place, and then opportunities must be made available to test the new knowledge. The role of action learning is to

provide the process framework, and then the environment and the support of management are needed to facilitate implementation.

Learning should be shared with colleagues and team members, either through the implementation process, by example or by actually teaching/sharing the learning.

8.4.1 Developing the individual

For an individual to learn successfully, the manager must be supportive and must have the wisdom to provide the right amount of input and stimulus.

The quality of the interaction in any programme rolled out is the differentiating factor. Managers must be shown how to support learning to ensure a sustainable, well-implemented learning process and create a healthy learning environment.

Learning in practice – how things are done:

> Discussion ensued regarding performance management: All BUs have given feedback on performance management. But it is how it is actually done between the line manager and the individual that is important.
>
> (Steering Committee Meeting Minutes 270509)

Links between manager and mentor are created in another 'aspect' of work which is developmental and not just productivity focused. The space is created to understand what behaviour and performance are required in a more 'constructive' environment. Reflection, goal setting and looking forward rather than focusing on the present are encouraged.

8.5 Entrenching benefits

On learning programmes learners bond with employees from other business units and become aware that the business is larger than just their one division and their area of responsibility. Being part of a large company with a reputable brand and with people that you have formed alliances with, encourages retention.

Individuals are given opportunities to develop and increase their own value in their particular 'discipline'. This reflects the organisation's 'interest' in them, therefore individuals pay more attention to the organisation. A level of loyalty is developed over a period of time, as well as a culture of learning which is aspirational and supportive.

The next leap is the notion of life-long learning, and it is this learning outlook at an individual level which is the ultimate goal.

8.6   Role of the Academy in individual learning

The influence of the Academy is largely in the unseen area of planning. An 80/20 principle is observed in all programmes to ensure that 80% of the effort goes into planning, which in turn ensures a smoother roll-out and implementation. The idea is to choose the right students and the right programme, and to put the right support in place before you start.

Another aspect which interfaces directly with individuals on learning events and programmes is *feedback*. Feedback is actively planned for, collected and followed up on. Regular meetings are held to look at summarised learner feedback. A good understanding of what the issues are is gained and explored before solutions are decided on. This is the catalyst to constantly improve existing programmes and to ensure that they remain relevant.

Maintaining a steady portfolio of programmes ensures a consistent approach to how we do things in the organisation. Chasing new programmes in a constant cycle of pursuing the latest fad is avoided.

8.7 Conclusion to the chapter

Individual employees need to be willing learners who see the benefits they will derive personally as well as the benefits the organisation will derive. Workplace implementation of new behaviours and practices is needed to see the full learning cycle through. The ultimate intention is for the learner to become a life-long learner, which has direct value for the organisation.

Individual perspectives on learning are important to establish a learning mind-set, and, over a period of time, to create a learning environment. The intention is for the Academy to provide the framework, policies, systems and some of the programmes, but for the business unit to create the environment of learning and the necessary support mechanisms.

Collectively, in due course, the critical mass of learning that has taken place impacts on the culture of the organisation and provides steps towards the aspirational goal of working in a true learning organisation.

Researcher's reflexivity points:

Individual learning

Not only were team members encouraged to attend the relevant workshops and programmes (internal and external) but they were also expected to know their portfolio of programmes well. Sitting in on some of the sessions where possible and feasible was actively supported. I also negotiated with HR to allow L&D officers to attend as many workshops and programmes as possible. This facilitated the ability of individuals to understand and communicate the value of a particular learning intervention.

Action learning and customisation

Relevance is key in andragogy, and thus even programmes and workshops run in conjunction with external partners (e.g. University of Pretoria, University of Cape Town or service providers) are customised. This ties into the business culture of requiring a practical and visible benefit and also embeds the learning faster and more comprehensively. Action learning is designed into all longer programmes and is a non-negotiable requirement. Senior management and subject matter experts are very supportive and willing to give of their time and input. This helped us get buy-in from the top, and these people then helped us by getting students onto the first programmes we rolled out. Having these same managers or others from management sitting in on student presentations tied the relevance back into the organisation. The ultimate reward is watching the 'audience' (invited management, line managers and SMEs) to these presentations grilling the students with questions and comments. This is rewarding as it indicates the business takes these programmes seriously and they expect a high-quality deliverable and they require the learners to be diligent. The experience for the learners as they do their presentations is that it also builds their confidence through the exposure gained.

When the learner is back in the workplace, the line manager then helps to create the space for the new learning to be implemented. This would not have been possible if the line manager was not included in the learning process.

Mentoring

A mentoring programme is run by the Academy, so that line managers can support learners. This programme has been running for more than two years but is still 'work in progress' because it is one of the most difficult programmes to implement. I have discovered that it needs constant nurturing from the business unit management, which means that I need to influence very strongly at this level.

9   THEME 5: KEY STAKEHOLDERS AND ROLE PLAYERS IN THE IMPLEMENTATION OF LEARNING

9.1   Introduction to the fifth case study element: stakeholders as role players

Learning occurs at an individual level. To create the best chances for success, the support of key stakeholders and role players is important.

Three key role players in supporting individual learning are HR, L&D officers and the Line Manager. Although the Academy might influence HR to implement learning, the actions of HR are dependent on their own individual commitment to learning. HR delegates to L&D officers, who, in turn, interface with managers to conduct needs analyses and compile detailed training plans. These plans are then communicated to individuals based on identified needs. L&D officers also engage directly with the learners to manage administration, learner progress and any problems.

The three key stakeholders in the implementation of learning are discussed in this chapter, namely HR, line managers and learning and development officers (Figure 52).

9.2   Collaborating to achieve a learning organisation

At a business unit level, the HR role is an influential factor in establishing a learning environment. If the MD and HR person form a strong positive alliance, the road to a learning organisation is a lot easier to travel.
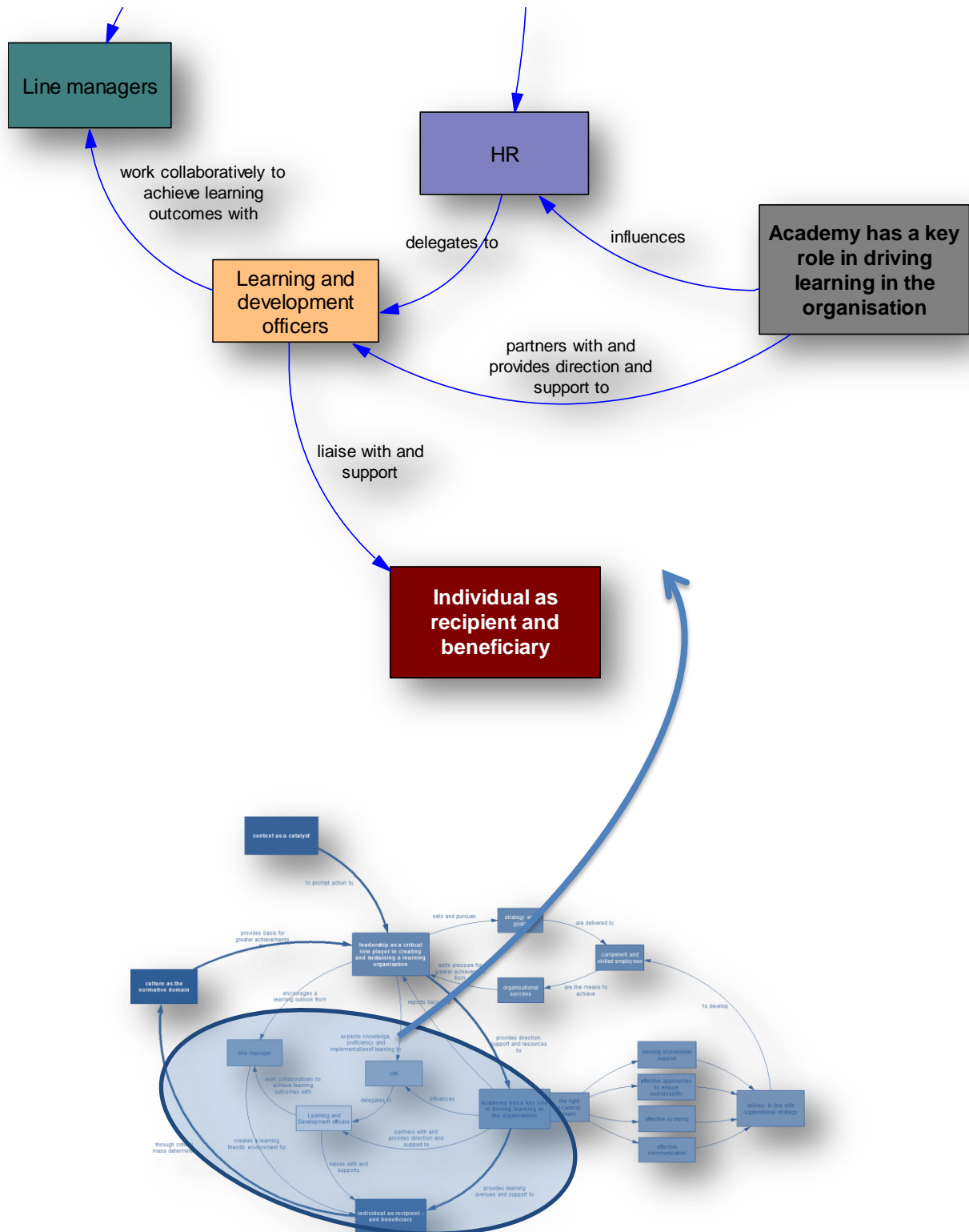
Figure 52:   Causal relationship between L&D, Academy and HR as key stakeholders

9.2.1   An inclusive approach

HR, in conjunction with the MD and, to a lesser degree, with the senior management, plays the role of gatekeeper for learning and development. Including HR into the

learning cycle of understanding needs, designing solutions, implementing programmes, doing evaluations and reporting, increases the chances of success for creating a positive learning environment.

9.2.2 HR as the gatekeeper for people development

The Group Five Academy is located centrally and is geographically removed from the different business units. This impacts on access and networking, and thus results in a considerable reliance on support provided by the three particular stakeholders at business unit level.

Tripartite alliance that impacts on learning behaviours according to an HR director:

I would definitely say MD's behaviour, I would definitely say HR director's behaviour, and I would definitely say business unit training officer's behaviour. Those are the three that impact most on interaction with the Academy or not.

If the HR director, the MD and the training officer talk the same language you haven't got a problem. The line guys would support it one hundred per cent. If the MD supports it and the HR director is pulling aside, he will not provide the right leadership to the training officer, nor the correct direction to the MD, and, therefore, service delivery won't impact on the business unit. If your training officer is protective around his or her area of delivery in the business unit it could also impact on the Academy [gaining access].

This belief is supported by a senior manager:

... then the next most important guys are the MDs, they are the gatekeepers and they won't necessarily get to make an informed choice unless the HR guys buy into it. So there is a combination. If [HR director] goes to [MD] and says, "Look this Academy is cool", ... [MD] will [agree]. If he [HR director] says, "No, they are a bunch of [idiots]", then [the MD's] mind-set will be that, and your ability will take a long time to change that.

A strong HR role is an influential factor according to an Academy manager:

... that for me is the distinct difference between [BU 1] and [BU 2], it's the ... I want to say actually the tenacity of the HR director convincing the MD that it [learning] is needed and with [BU 1] it's not the same. [The HR director of BU 1] is not a tenacious person. … So it's also that strong HR person sitting at the business unit that can influence upwards.

The role of HR is pivotal in creating a learning environment, and the stronger the relationship of trust between the HR and the MD, the greater the opportunity to create a learning organisation. It is dependent on both being committed to the development of people and seeing the link to achieving strategy through people.

9.2.3   Consulting and contracting with HR

The Academy has a strong role to play in guiding the way forward with learning and development visions and strategies. To gain the support of the business units it is necessary to understand the needs, the context, and the challenges faced. Consulting and contracting with HR entail engaging with each business unit independently.

Engagement with HR and L&D development representatives at business unit level is important as they provide guidance in terms of needs, and because it is necessary to establish a relationship with them based on trust.

Establishing a game plan early in the life of the Academy:

> Some gaps have been identified from both the Academy side as well as the BUs. The Academy will in future supply business units with formal feedback on the programmes, especially the feedback from learners. The business units [HR] in turn will respond to requests from the Academy.
>
> (Kopenong 190607)

One of the lessons learned was that it was false to assume that people knew what the Academy was doing. This lesson was learned in June 2008 at a breakaway conference where the Academy was given time to discuss basic concepts and the Academy's model and strategy. A good deal of heated debate ensued regarding changes to the model, and in the process people were involved.

Opportunities for discussion:

> 1. Introduction
>
> JB gave an overview of the role of Group Five Academy and discussed the Academy strategy. Changes [were] recommended to some concepts ….
>
> (Steering Committee Meeting Minutes 260608)

The relevance of internal debate to drive awareness and a thoughtful response to the current situation is particularly necessary to drive a forward looking focus by acting today on tomorrow's needs. In this debate the usual reaction in bad times is to cancel training – as implied below – by passing the buck to other BUs that are doing better. The long-term impact is on the psychological contract with the individual. From a positive perspective, the ideal time to train is when people have time on their hands and not when everyone is on site and under enormous pressure to deliver productively.

Feedback and discussion at a Steering Committee meeting in 2010:

Figures are down across the group on the previous year in terms of both numbers and costs. [HR director] feedback – projects in unit have not tapered off. Biggest driver now of training should be on current big active projects such as the [name of big project in a particular BU]. ... Forecasts are not rosy – certainly for the rest of the financial year, and this impacts on the constraints in budget spend. ....

Revenue and payroll – need to be down in proportion if you are/can going to be training less. Culture of on-going training must not be lost. [HR manager] noted that training does not need to be expensive – can be done in-house.

(Steering Committee Meeting Minutes 160910)

As the 'end user' of development initiatives, the BU HR must engage with and discuss challenging issues in a timeous manner. Common agreement is reached and those outside of the agreement need to compromise. This works better than when the Academy 'pontificates from a pedestal'.

Where challenging trends are spotted these must be shared openly with stakeholders. If either the programme or workshop is not working or there is a lack of communication or 'apparent need' within the BU, then decisions must be made: should the programme be changed or must employees be motivated to attend?

Raising awareness at the Steering Committee meeting:

A review of the target market and needs must be conducted across BUs. Attendance numbers are dropping for Situational Leadership II, Diversity, Partnering for Performance and Targeted Selection.

Sharing challenges and looking for solutions collaboratively not only raise awareness but also open up the problem to diverse inputs and optimal outcomes.

9.2.4   Conclusion to HR as a stakeholder

By engaging early on with stakeholders like HR, there is an improved chance that buy-in will be established, that suggestions received will facilitate design and roll-out, and that MDs will be positively influenced. HR plays the role of gatekeeper and they have the ability to influence the MD and senior leadership in a positive or negative manner. Cognisance of this role then means that the Academy needs to target a communication strategy at MDs and HR so that the message is communicated as widely as possible.

In addition, the Academy needs to work and communicate closely with L&D officers to provide them with the knowledge required to support a learning environment.

9.3   L&D as a team player and stakeholder

The L&D function plays a critical role at business unit level as the L&D officers are the individuals with learning information, a learning plan for the business unit, and the portfolio to keep learning on the business unit agenda.

9.3.1   The L&D person as the pivotal role player

The L&D person often has a wider human resources portfolio which can include recruitment, payroll administration, and so forth. This frequently causes a great deal of pressure. The Academy is able to provide support and direction as and when needed, and the L&D person then channels communications, nominations and other learning-related functions into the business unit. In turn, the L&D officers then

engage with line managers and also individuals to gauge learning needs and build learning matrices (see Figure 53).
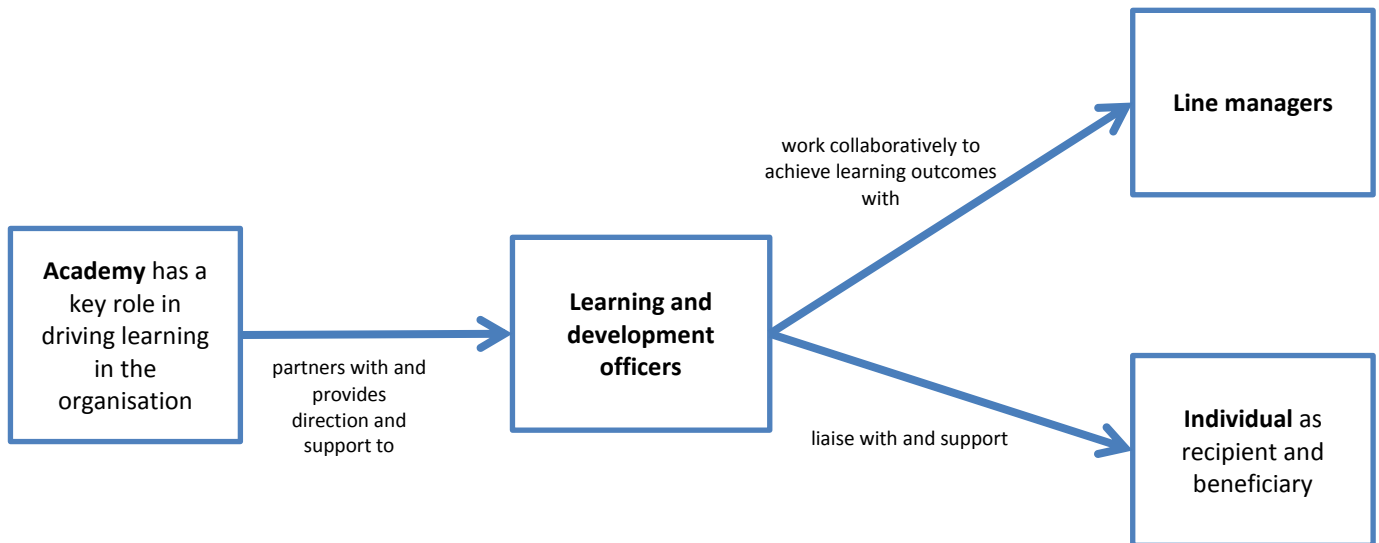
Figure 53:   Causal relationship between L&D and key role players

9.3.2   Building and maintaining the profile of L&D

Traditionally, L&D representatives in Group Five were administrators who had no background or knowledge in the field of skills development. Given that human resources knowledge of the field is largely cursory, this had a significant impact on the way training and development were conducted at business unit level. The Academy quickly began to realise that the skill of L&D representatives had to be developed and their profile in the business raised. This is an on-going process that was initiated in mid-2007.

Re-branding the Training and Development Forum:

Learning and Development Team

Even though it has been widely communicated throughout the Group, many employees still don't know that Group Five has a newly branded 'Learning and Development Forum'. The L&D Forum has a representative from each and every business unit in Group Five and meets on a monthly basis to discuss skills development topics related to national themes for the calendar year – for example focus from July to October would be on BEE scorecard measures or from April to June a focus on Workplace Skills Plans. The Forum provides the platform to share important skills development aspects from their business units, as well as ensuring that all L&D administration such as People Soft capturing, delegate nominations, venues, certificates etc. are administered in accordance with Group policy and process.

(Board Report Jul-Dec 10)

Figure 54:   The Learning and Development Forum and the Academy

Forum meetings are held monthly and up to 15 L&D members attend (see Figure 54 above which is a photo taken at a forum event). This Forum has become the basis for a good working relationship and the growth of a 'community of practice'. Working closely and collaboratively to provide a united effort in people development can only happen if regular interaction takes place.

Setting up regular L&D meetings:

> In summary [the head of Academy] indicated that there will be monthly learning and development meetings between the Academy and the different business units to address training in Group Five. The Academy Steerco will meet every second month and the Academy Board every four months.
>
> (Kopenong 190607)

By building and supporting the L&D profile, the Academy helps to raise awareness of the learning function and at the same time keeps the ownership of learning within the control of the MD, HR and BU management. Employees also have ready access to the L&D person, and learning is thus determined at a personal level. The Academy fulfils a backstop and support role in the background to ensure that learning is not forgotten or neglected.

9.3.3   Collaboration and a community of practice

The sharing of roles and responsibilities across the Academy as well as with the L&D Forum frees up resources and encourages learning in an environment that is 'safe'. Relationships are established and levels of professionalism are increasingly raised through collaboration.

Thoughts on the Academy and linkages to the L&D Forum from members of the Forum:

I think also you are designing your training and development around a Group. So you are not fishing out there for a service provider to provide a service of sorts if you are aligning your training and development to your Group strategies, then everything that the Academy has in place is aligned for your business.

And also having an Academy, just building the relationship, just means that if I need something that [L&D person] has and I can phone her and say, "How do you do it?", might mean I can do mine better because she has given me advice on how they do it. And that means that we can bounce ideas off each other and make improvements.

Finding a common way forward and sharing accomplishments and technology accelerate the pace forwards for L&D.

Planning for the future and putting the right systems in place:

> The goals and targets going forward for the Academy were discussed and the current [e-learning] functionality and the Academy website were demonstrated.
>
> (L&D Forum Meeting Minutes 170310)

Working with L&D to meet their needs means that the workload is spread and there is a sense of achieving things together.

Collaborating to maximise impact:

> The roadshows to the Universities are starting in May and the L&D Forum members are welcome to join. There will also be marketing done at schools. L&D Forum members must please send through names of schools that need to be visited.
>
> (L&D Forum Meeting Minutes170311)

Working together helps achieve goals more comprehensively and has the influence of critical mass to take learning into the organisation with aligned processes and practices.

9.3.4 Standardisation of policies and procedures

Aligning processes and procedures provides a cohesive approach, and eliciting input from all players and working in conjunction with them provide a secure basis for buy-in and implementation.

Working together to share best practice:

> It was requested that any policies and procedures that are currently being used by the business units be forwarded to [the head of Academy] prior to shut down. This is to assist in the establishment of a QMS for the Academy.
>
> (L&D Forum Meeting Minutes 261108)

Before making sweeping changes, it is important to understand what is in place, and if it is working. Where major change is needed, the impact of the change and the timing of it must be discussed and negotiated. Roll out is then not blocked unnecessarily, and all stakeholders understand the reasons for the change and the benefits. The Academy plays a central role in aligning L&D processes across the Group in collaboration with L&D.

Influencing L&D processes across the Group:

> In the [L&D] meetings, Academy needs to confirm what the training administration staff is using to capture training information. A handover document to be created including a set process flow for all BUs. … All training and development people must bring a PeopleSoft report on all training done for the month to make reporting-back easier.
>
> (Academy Operations Meeting Minutes 150708)

Part of the role of the Academy includes aligning processes and procedures with the intention of working towards best practice.

Providing learning interventions to develop and standardise processes and procedures:

Using different methods, such as peer education to communicate changes in legislation or guidelines, provides a shift in viewpoints and builds competence at different levels.

Peer educator development:

Once a need is identified, the Academy provides support but at the same time draws on expertise and resources from within the L&D team. Working with L&D to achieve best practice means that we at the Academy build on current knowledge and also have alignment up front.

Working with L&D as a team in the role of catalyser and 'steamroller' to take the process forward:

Standardisation provides a solid foundation on which to build an innovative learning culture.

9.3.5   Role as vendor committee

The L&D Forum plays the role of vendor committee to select important vendors. This ensures that their identified training needs will be more closely met and also that buy-in is not a challenge when roll out commences.

Central systems and common processes:

Finding best practice and then implementing it will only be possible if there is a cohesive, coherent approach that is agreed on and adopted by all. Standardisation of common programmes is only possible if key role players are incorporated into the decision-making and if a rigorous but user-friendly process is established mutually.

9.3.6   L&D as a qualified resource

In the early days of the Academy, HR was supported by administrators who managed the administration of payroll, recruitment and training. Very little was required in terms of qualifications other than good computer literacy and good organising skills. Knowledge of the education and training field was poor. The Academy employed specialists and slowly put pressure on business to recruit more selectively.

Comment from an HR director:

- raising the bar of L&D expertise

I think that is the other deliverable which the Academy can take as their deliverable, is [establishing] the requirement for a business unit training resource. Previously it was always an ad hoc function that would be delivered by, say, the HR secretary, as opposed to a dedicated resource who is well qualified, who understands training, who is not just a training administrator.

Feedback on Academy discussion:

- partnering with L&D

What we are discovering is that there are more common needs than we ever thought, because we are getting business units to talk together. And they sometimes come up with common solutions. So, a lot of the work we do is partnering with external people and a lot of the vetting of service providers happens as a collective, so it's not the Academy that does it, it's the Academy and the L&D Forum as

The crux of the engagement with L&D is the reality that the Academy can only succeed through the Learning and Development personnel, through HR and through the sanction of the MDs. We are dependent on those individuals to engage with us, to discuss needs and challenges, and to partner with us to discover solutions.

To make progress it is necessary that Academy staff as well as L&D members are more than administrators – that they are able to guide the learning and development function and partner with business in an informed and practical manner. The Academy provides, encourages and pushes business units to give L&D personnel learning opportunities.

Building functional competence and knowledge lifts the benchmark across the business, as well as engages the staff. Learning from each other and establishing relationships build an internal community of practice.

Knowledge provides confidence as well as the tools to implement effectively:

ODETDP

JB noted the urgent need to develop the HR L&D persons and the role the Academy is playing in support.

(Steering Committee Meeting Minutes 270509)

A total of 17 members of the [Learning and Development Forum] (L&D representatives from each BU) will attend the much awaited Occupationally Directed Education, Training and Development Practitioner (ODETDP) training which will commence on 20 October 2009. ... The intention of this programme is to build the level of professionalism within the L&D cadre to ensure that people development throughout the group is conducted in alignment with the strategy of the organisation and to the same high standard.

(Board Report Sept 2009)

A business unit MD reflects:

- impact on L&D development

> *And I do believe we've got a young girl who I didn't rate, to be quite honest with you, now monitoring and controlling our training programmes across the board and she's improved tenfold. She's a different person and she's enjoying it. So it's win-win. We have got a person in there that actually enjoys what she does and is enjoying the challenge of putting the whole thing together, obviously with input.*

Having competent and skilled L&D officers impacts directly on the learning culture – from the MD downwards to the lowest levels.

9.3.7 Getting buy-in at site level and with line managers

The nature of the construction industry is such that the majority of employees work on sites that are far removed from the central head office. Facilities are primitive and temporary, and conditions are not ideal for learning as it is a highly pressurised and labour-intensive environment. Getting access to site management and getting buy-in are difficult. Initially L&D personnel did not venture onto sites.

> An experienced Academy manager notes:
>
> - know and meet with your customer
>
> *Very junior management people on site complain to me and say to me, "Listen, we need to go on a course on this, we need to do that. And we've been speaking to our learning and development people and nothing's happened". And that is my biggest problem that I have with the learning and development people. Because they want to run training and development from an office. They need to get onto the site. That is where the heart of the business is and that's where I need to get close to. Whether it means putting on your boots and overalls and hard hat and going to the site and speaking to people and find out there what is the problem. Because remember something, at the end of the day, those people on site make the money for the company.*

Not only do L&D personnel need to have expertise in the field of learning and development but they also need to have some knowledge of and exposure to site operations and skills requirements.

> Feedback from an Academy discussion:
>
> - winning trust by engaging on site with site management
>
> *There is only one way that we know it works. And it's something that [an L&D person] said yesterday, that is so simple but just so true. Unless you meet the site managers, … face to face, over a period of time, to get their trust, they are going to ignore you, they are going to do their own thing. And they are not going to report on [training] and it's not going to be focused and structured, etc.*

Encouraging L&D to engage at site manager level is part of the Academy's role, and this requires influencing at HR and MD levels.

9.3.8   Conclusion to 'L&D as a team player and stakeholder

The role of the L&D person is key to rolling out learning at BU and site level. Competent and committed individuals with knowledge of learning and development and a basic knowledge of construction skills provide the basis for proficiency and the achievement of implemented learning solutions. Engagement with other key stakeholders is necessary – these include HR, individual and line manager.

9.4   Line manager as a stakeholder and role player

A line manager manages, conducts performance reviews, monitors productivity and leads employees in a continuous cycle of workplace activities. The culture of the organisation is intensely outcomes driven and deadlines are critical. If not met, the financial penalties frequently run to millions of rands. Negotiating time out for learning is never easy and is never guaranteed as there are many unexpected events which change schedules and plans. A few days of rain, or a change of specification from a client, can cause a disruption depending on the stage of operations.

9.4.1   Role of the line manager in supporting learning

Learning and development officers are the drivers of people development at a business unit level. Line managers are the gatekeepers of their people's learning –

nothing happens without their engagement in the process. This is particularly pertinent in a delivery-focused environment where every person's input is very important every day. Gaining line manager support is a first step towards implementing learning. This relationship is indicated in Figure 55 below.
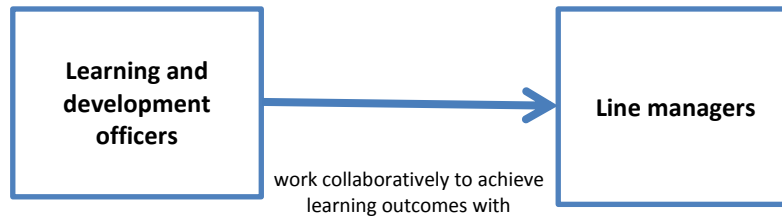
Figure 55: Causal relationship between L&D and line manager

9.4.2 Managers need to recognise business value

The implementation of programmes requires the consideration of a balance between individual benefit and organisational benefit. It also requires sufficient focus on business issues and challenges to ensure relevance to the organisation and to speed up the linkage to direct workplace application.

An action-learning approach to many programmes is taken, which results in direct application as learning occurs. Workplace projects require implementation and results are then presented to management.

Balance of academic and business aspects:

> Final presentation of proposals to panel on 26th – panel comprising 3 [Business School] members and 3 Group Five members.
>
> (Steering Committee Meeting Minutes 270207)

Action learning cannot take place without the permission of the line manager, and on occasion additional resources, such as a budget or access to expertise, are required.

The role of the line manager is to provide a supportive learning environment as well as to play the role of learning advisor in order to embed learning, particularly in action learning.

Line manager as developer:

Adapting learning to the real environment delivers tangible value which in turn garners active support from line management.

Winning support:

Successfully implementing learning and seeing results are important but it is equally important to communicate this success to gain buy-in from other managers.

9.4.3 Getting management involved in learning and development

For the launch of the flagship leadership development programme with a well-known business school, senior management were invited to (and attended) the launch cocktail party. The impact of this was that the students realised that senior management supported the process, and this motivated them to achieve good results. On the other hand, senior management became aware of who was on the programme and could get to know the potential future leaders of the company.

Engaging management early in the learning process and ensuring they understand the full spectrum of the programme build a sense of ownership. Managers feel they are included and their expectations are also managed, so that when an individual is learning, the support provided is 'informed support' and therefore more targeted to the individual's need where it interfaces with the workplace requirements.

9.4.4 Line manager support is required to develop individuals

Workplace learning succeeds in an environment where a line manager is able to provide learning opportunities and support to learners. The line manager needs to have trust in the learner's learning potential as well as in the process or programme. Ultimately this means that the Academy needs to be clear on the programme details, the process, as well as the resources required. Above all, there needs to be visible delivery in terms of improved competence and ability.

9.5 Conclusion to the chapter

The support from all key stakeholders needs to be actively sought by the Academy, and opportunities to demonstrate commitment need to be arranged to clearly communicate the value of learning to individual learners. Input from all stakeholders is needed to provide a seamless channel of delivery if the goal of individual learning and the longer-term vision of establishing a learning culture are to be achieved.

This chapter reviewed the importance of the key stakeholders, namely HR, learning and development officers and line managers, in creating a learning curriculum and a learning environment for individuals with a view to establishing learning as an organisational norm. The focus of the next chapter is the achievement of a learning culture.

Researcher's reflexivity points:

Building the expertise of L&D officers

The concept and implantation of the programme was the idea of the Academy Programme Manager and co-founder of the Academy. He took on the role of running the monthly L&D Forum meetings, and his detailed technical knowledge of systems enabled him to mentor Forum members to achieve better outcomes and build their L&D-specific knowledge.

Building the expertise of individuals is a long process and requires individual effort as well as collective support. By starting early on we were able to build a good base of skills and this has had a big impact at business unit level as needs analyses are thoroughly done and engagement with site management means that real needs are met.

HR – some challenges

An Academy is expected to fall under the wing of HR, but my experience in implementing the Academy made me realise that in many instances HR is either too busy/overworked or not interested in people development. This impacts very negatively on implementing a consistent learning strategy. HR by nature tends to deal with historic or 'here and now' pressures, whereas learning strategies need to be forward focused. For example, engineering bursary students take at least four years to 'grow'. Since the role of the Academy is to support strategy through the provision of the right skills at the right time, it would make more sense if the reporting line was directly with senior management and if HR was a partner.

I found it extremely difficult to support learning in business units where the HR director felt that I was intruding on his turf. The HR director plays a very strong 'gatekeeper' role, and 'jumping the fence' without his knowledge has very short-term benefits. I have also learned that the only sustainable way to change HR mind-set is through a long learning process and building trust: there are no short cuts and no guarantees.

10   THEME 6: CULTURE AS THE NORMATIVE DOMAIN

10.1 Introduction to sixth and final case study element: organisational culture

Individuals are linked to each other on a number of levels. In an organisation the first area of commonality for individuals is the cognisance of policies and procedures and the recognition of hierarchy and power structures. At a second level there is the observation of the unstated but just as prevalent norms which determine behaviour. These can include attitudes and behaviours related to 'how we do things here', what gets rewarded and the aggregation of 'beliefs' which drive the culture of the team, the business unit or ultimately the organisation.

Group Five as a construction entity has a high proportion of technical expertise – mostly in the engineering field. Engineers are well known for a disciplined and pragmatic approach along with a focus on achievement and 'getting the job done'. There is also the added dimension of seeking solutions to daily challenges. Construction as an industry differs from most businesses in that each site is usually fairly remote and without any permanent infrastructure. Projects are also of a short duration, usually averaging around two years. Teams are formed and then disbanded for each project, and at each phase of construction the team can change significantly. Therefore, challenges facing the site manager include; a constantly shifting team dynamic, an uncompromising schedule, and a high degree of technical expertise required with low tolerance for error. Organisational culture in Group Five is impacted by all these factors.

Gaining access to the individual to provide training is fraught with logistical constraints related to both venue and timing. In the sector the result has been that learning and development are not the norm.

> As noted by an Executive Committee member in an interview:
>
> - in the sector a culture of learning is not the norm
> *We are trying to do something within this organisation, position it strategically differently. But it's not the norm in the sector; it's not the norm in the industry. I think we should continue to mark that as an advantage. Certainly at the skills level and certainly to the clients there is an advantage of doing it.*

The challenge for the organisation in looking into the future was to ensure capacity to establish a competitive advantage – to become a learning organisation through providing learning opportunities that add value to individuals who, in turn, through a process of critical mass, begin to have an impact on the culture of the organisation (Figure 56). So, for the Academy the role included keeping true to the informal maxim of 'deliver on time, within budget and within spec' but taking it to the next level through collaboration, innovation and good leadership.
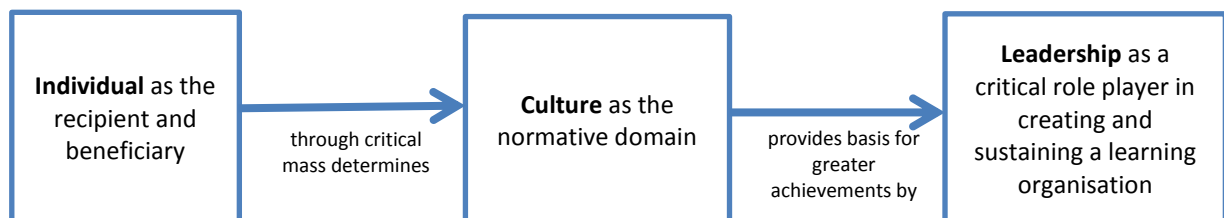
Figure 56: **Causal relationship between the individual, culture as the normative domain and leadership**

10.2 The organisational culture was …

In 2006 a change in leadership took place with the retirement of the CEO and the promotion of a business unit managing director into the position. Reflections below are an indication of the culture prior to 2006 as the organisation was coming out of a prolonged 'bust' cycle.

Reflections of a senior Executive Committee person during an interview:

- culturally barren

I think certainly in terms of a strategy of Group Five – we went through quite a few strategic reviews. I think I had just joined exco then and I was in the [business unit] and there were some tasks that were given to various members of exco and one of them was about people and systems and culture. Now, this in an organisation at the time that was obviously pretty culturally barren frankly.

- low job satisfaction and low retention

Yes, I think certainly the Group Five had come quite a long way from its roots but it had got stuck a bit in terms of its culture. It was ... very much a performance-, individual-orientated culture and quite a harsh command and controlled environment. So you found that job satisfaction was quite low and that there was quite a high turnover of people.

- not a learning organisation

So we weren't a learning organisation and you can see that from what type of work we did and where we'd come in a strategic process. We hadn't come very far along a road. All the vision was there. The wherewithal was ... which was the people – was missing, I think.

- difficult environment – change in leadership

So I think in the first year, I think it's fair to say, in the first year when you joined us, is that we were also going through quite a deep transition here in terms of leadership. So the human resources functioning in Group Five, in the time leading up to that change was very much about how you pay people or how you hire and fire them. There was very little in terms of how you actually create a culture of being an attractive organisation and I think you also experienced that turmoil. There were leadership issues and so on. So maybe the first year wasn't really necessarily reflective of what could have been achieved. Because it was really in a very difficult environment.

The change in leadership did not automatically mean a shift in the deeply entrenched culture that was prevalent at the time. However, with the horizon of potential work expanding each day, the pressure to change increased rapidly.

As noted by an Executive Committee member:

- transition from contractor mentality to a professional business outlook

> *I think Group Five's culture has changed. If I go back, when I joined the business, we had a lot of ... well-educated people, but I think we had the construction mentality and the rawness of a construction company, seven, eight, nine years ago. I do think we have moved towards a professional company where the conversations that I [have] had around boardroom tables and around the pub is really more about strategy, vision and longevity versus the conversations that we had. … So I think that, just the behavioural side of management and leadership has changed from contractor mentality to a professional business mentality. And I think with that comes the understanding of the fact that, because that culture has changed, I think the culture of the people working for me and the mentorship and the role models have changed.*

Decisions taken at a senior level resulted in tasks/projects being allocated to different Executive Committee members. Some of these decisions played a role in impacting on the culture of the organisation.

A senior Executive Committee member noted:

- mandated to look at training and development

So I took it upon myself to make my part of that action to really look at that training and development of people and then it became more of a passion actually. And I think certainly the fact that I was able to implement that with a mandate … I became commissioned to make sure it actually did happen. I think that was obviously fortuitous. But it was borne out by the need to do something in terms of building capacity and retention of skills.

In a very functionally oriented culture, the uptake for the Academy was slow – as noted by a senior executive:

- influential leaders with diverse view points

But it did take a long time [to get the Academy going], well, a fair amount of time, to get traction but that wasn't due to the lack of effort or anything else. I think it was because of the nature of the organisation which we are trying to move. I mean it is like an oil tanker at this stage. And you have got all these individuals or all these organisations that have got their own view on the world. And so any change in Group Five is not easy to implement. And because it was a human resources related orientation it needed to demonstrate that there was another way of getting change into the organisation other than just by brute force.

In the early days, the Academy was focused on skills development – it looked particularly at developing leadership and aligning ways of managing and leading.

This quickly transitioned into building functional capability as the business realised the possibilities of an in-house Academy.

An Academy manager reflects:

- culture of pushing productivity

In 2006 the message, not spoken message, but the message was about generating revenues, it was getting the job done.

So, the organisation, realising that they needed to move into the future with multi-disciplinary projects, realised that there [were] things that they needed to do. And that is why the focus was strongly focused on productivity.

A core aspect of the culture was the focus on delivery, and ground was slowly won through the tangible proof and outcomes that were demonstrated by the Academy through the training and development that took place.

An Executive Committee member reflected in an interview:

- Academy gaining credibility through delivery

So, you were never going to achieve training and buy-in of people by brute force, so it was the long hard road. But I think the fact is that people measured its performance by its outcome, output. And as the output began to increase and have a high degree of credibility in the organisation, the buy-in accelerated.

The change in leadership at a corporate level, and the bedding down of the Academy's structures and its sphere of influence took some time. Starting small, the Academy was able to establish a firm foundation and began rolling out training with 'early adopter' business units.

Looking back to the early Academy days – review by an Executive Committee member:

- learning supported by new leadership

10.3 The organisational culture now …

The organisation is divided into a number of business units, and in the construction space there are four main entities. Each business unit is headed by a managing director who is supported by a full management team. These business units are also geographically spread and have specialised business areas, namely housing (large complexes), buildings (high-rises or large centres), engineering (mining or chemical processing plants) and civils (roads, dams and bridges). These business units all have their own 'head office', and these in turn fall under the umbrella of the 'head office'. Work takes place in South Africa, Africa and the Middle East.

10.3.1 Culture at BU level

On larger projects there are instances where the various business units work together, but for the most part work is won and conducted independently. The net impact of this is that the different business units have maintained separate cultures.

A senior Executive Committee member discussed the Group's challenges around culture in an interview:

- understanding the separate cultures

[Culture] plays a huge role because if the culture in your organisation is ... or by its very nature a centralised Academy is going to be ... it depends very much on the organisation that you are trying to apply this to. If it's one organisation, one culture and one location, it's a hell of a lot easier than if you have got a multiplicity of businesses in a group in many locations around the world. I think then one has to understand what it is you can achieve and what are the cultures in the organisation. Because if there are many cultures you are going to have to understand them.

The central head office plays a very strong role but it does take time to gain traction – a point noted by a senior Executive Committee member:

> - culture of resistance
>
> *And sure, if it becomes a head office down to business unit issue, ... there is always going to be a natural resistance to that very structure, never mind what you are trying to do.*

The resistance by the different business units to changes in systems, policies or ways of working has an impact on the organisation's ability to act or react.

> Insight from a senior Executive Committee member:
>
> - a fragmented culture
>
> *But it does talk to culture. Is it a one culture or is it a fragmented culture, and I have to say we had a fragmented culture and it's still not fixed actually.*

> This view is reiterated by HR directors from three different business units:
>
> - we are different – we bring in the money
>
> *We are different, we have different challenges to deal with, different cultures. In our BU we have a specific philosophy that the knowledge and skills should reside in the business units, and we master and map our own destiny. We are in the final analysis, ultimately accountable to secure the turnover and put the profits on the table.*
>
> - the MD controls everything
>
> *At [business unit] the MD sets the training budget. If he sets it at 0,7%, it's 0,7%. Until he decides its 1% then it becomes 1%. Secondly, he determines the courses that the guys go on and today he might think that Microsoft Projects is the right thing for the engineers to do and tomorrow he might think [it's another programme].*

> Another BU MD saw things differently:
>
> - culture changed to a more professional approach
>
> *And hire and fire and walk down the office and swear at everybody and on site it's rule by fear type of thing. That culture has changed to a professional environment that it's about the projection and the perception and how we sell Group Five. To me it's a very professional organisation.*

> *I would say that Group Five at the moment from a professionalism point is very high in professionalism, and what they do, and their approach to people and culture and values and ethics go with it of course.*
>
> *As you become more professional in your business and more confident in what you do, you are not threatened by training people, educating people, so that culture has changed.*

This diversity in culture at business unit level meant that the Academy had to deal with each entity separately and with different approaches. The view that the Academy is not seen as being the same as the central 'head office' is expressed frequently, but this could be because the business unit leadership and employees enjoy the benefits that the Academy provides.

A Group-wide 'climate' survey that is conducted annually has indicated that employees have a very high brand affinity and have pride in working for the organisation. The organisation has come a long way since the early days of the new CEO in 2006 – and there is recognition that a long journey lies ahead.

10.4 Creating reality from the vision: the Academy

The original vision for the Academy was developed at Executive Committee level at a time when the organisation found itself at the beginning of a boom cycle. However, it took a single senior person to take the vision and make it a reality.

> A senior Executive Committee member noted the initial thinking for creating the Academy:
>
> - the original vision for the Academy
>
> *For me it's learning ... creating a learning culture which in itself grows capacity, confidence and all of those things. It's an attractive, retentive thing too. But at the end of the day, smarter people will do smarter things.*

Acceptance of and engagement with the Academy started slowly and with one or two business units – and this grew over a two- to three-year period, by which point buy-in had been firmly established.

> An Executive Committee member commented:
>
> - synergy across Group Five – and people to support the strategy
>
> *One of our strategies is to have the people to support the business. And I think that's what [the Academy] does. It helps us to develop people to support the business. We also say that one of our strategies is the development of a single business rather than a group of separate businesses.*
> *So, yes, it's just about people with the right skills, ready at the right time and, yes, and then drawing everyone together to work together.*

Support for the Academy is dependent on delivery, therefore, close attention must be paid to business needs at all times.

10.5 Organisational values

Part of the role of the Academy was to share the espoused values (Figure 57) of the organisation and to encourage a process of engagement between managers and employees to embed these values.

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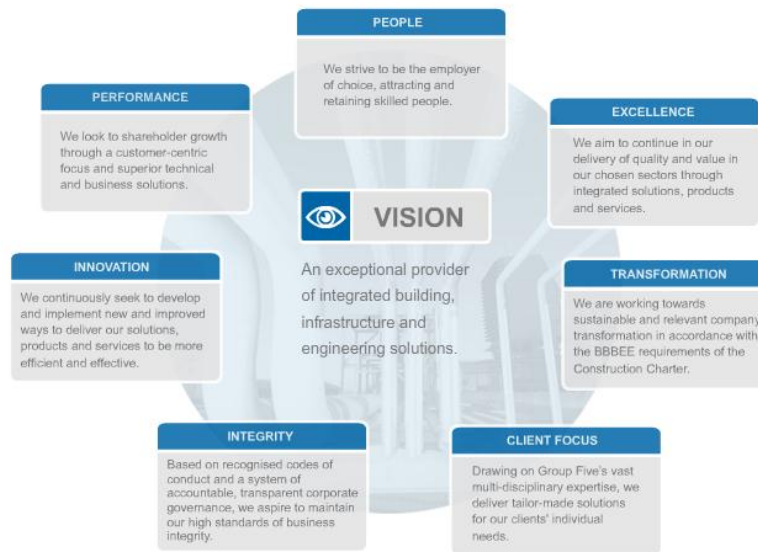
Figure 57: The Group Five values – known in-house as PETCIIP

An Executive Committee director reflected:

- establishing organisational values

And again the PETCIIP values were not bought by everybody and nobody knew them. But I do think that that is another sort of a trigger where people have now bought into a lot of the values and there is a lot of this growth in education and training. So it all seems to have come together in a reasonable time.

Feedback from an HR director:

- communicating the values and slowly impacting on culture

Then for a very long time we knew that we had a leadership dilemma in our business [unit]. Not having the successors present. The managers not behaving the way Group Five or the culture wanted them to behave.

So [with the Academy] bringing in the whole leadership component around Situational Leadership, the company model, solidifying the values, driving that through the managerial development programmes, identifying the management fundamentals that [are] required – at least at a senior management level and then it gets taken down [to lower-level employees]. Personally I can see people behaving

differently. They ... managers are responding positively to the interventions, but the real benefit of that, we will only see, I think, in our culture in the next three to five years.

10.6 The role of trust

A consistent high level of delivery to meet development needs in the business units is required to gain acceptance and win trust. With this in place, access to information, resources or support is quicker and more comprehensive.

A senior Executive Committee member noted:

- delivery builds trust

I think it demonstrates that if you deliver you gain people's trust and it becomes much easier. The hard bit is up front.

In order to gain trust, competent team members need to engage with business unit HR and management, and then they need to demonstrate ability to deliver as promised.

An MD noted that not only management needed to be convinced, but that employees needed to believe in learning as well:

- winning the trust of employees

I think a lot of employees have seen the benefit of the training. So there is the upward push of wanting to be trained. I think when the Academy started initially possibly there was some scepticism that this is not going to be around for a long time. Is the training going to be worthwhile? And as the courses become more applicable you get the peer pressure, "I've been on this course, it was great". And the next guy goes, "Well, why was I not on that course?".

Trust plays a big role in giving access to employees and resources. There are a number of gatekeepers at business unit level and any one of them can provide stumbling blocks to progress.

10.7 Role of leadership in influencing a learning culture

Different business units have their own cultures, and in order to create a learning culture in a unit the support of the MD is needed. Different approaches are taken to implement this learning culture – some are a little more direct than others.

An HR director commented on the behaviour and attitude of his MD:

- commitment to learning

And then the first challenge comes when they [learners] have got to finish an important project work-wise and an important project Academy-wise. And they would always try and duck and [the MD] made it publicly known at every public forum that he addressed and said, "The moment you are on a programme you will not leave the programme, you will not fail the programme. Because if you leave or if you fail I will deem you a failure, irrespective of the circumstances". And ... well, we had some guys that would have been very keen to gap it once the going got tough. But [the MD] unambiguously stated, "You will not". But [the MD] created the culture, once you are in, you're in. You never fail.

The Group culture leans toward being very task driven – and when directives are given there is a high level of compliance.

10.7.1 Re-aligning 'not invented here' thinking

In many instances over a long period of time, every new initiative by the Academy was met with resistance from certain business units. This created a lot of strain on the Academy, and different approaches to win support for each and every initiative were experimented with. With one or two business units the acceptance was a lot more forthcoming and this provided the momentum for the Academy to show delivery and progress. Other business units then followed suit.

Feedback from an MD and the HR director of his BU:

- early adopter ready acceptance of the Academy concept

I probably evolved with the Academy from that perspective and I was there at the launch and all that. So yes, from that perspective I probably got lucky that I came into being [as an MD] round about the

same time as the Academy and again obviously, like you said earlier, it was a bit easier for us because we knew it was [the ex-MD's] initiative. And believe me, [he] spoke to us about the Academy.

Because I had an aligned MD, an aligned management team and myself. We couldn't understand why everyone wasn't jumping on this bandwagon.

Because we were loyal to [the ex-MD and now CEO] and he was our boss and he sold the idea to us. We were on the same page from day one. Other business units didn't have that. Then when [the ex-MD] became the CEO of the organisation, we knew the background, we knew the context. We knew what this was going to achieve and therefore we supported it from day one with great enthusiasm. As well as the fact I was new at Group Five.

Reflection from a senior Management Committee member:

- how to win support

Hard question to answer and it sounds like a compliment but I don't mean to be facile – the Academy has gained more traction than I ever thought it would. So what would I do differently? I'd probably do it the same way because whatever combination of [mess]-ups and good things that happened simultaneously ... there is a fairly spontaneous recognition of the Academy. In this cynical business where things come and go, that is quite an achievement. So what would we do differently, I'm not sure. I might have, if we had to do it differently, the fact that we still seem to be quasi-debating with some business units, I would have done that differently. But would you have got further with your approach than I would have got? Probably. I would have made an ultimatum, "Thou shalt". I'm too old to be arguing with things that are obvious.

Further reflections from a senior management committee member:

- early adopters push other leaders to take a position

There's not a lot I would have changed. I think we got it right. We introduced the MDPs [PMDs] and the things with a bit of 'woema'. You brought some other things in which people thought were quite sexy like the safety learnership and what-not. The organisation caught a wake-up to something that was happening. In this slow moving, sluggish pace that we work in, it gives you a chance to get used to the idea. I think that ... you know you talk about leadership assisting, I think the role of [early adopter business unit] in keeping you guys alive in the early years, you shouldn't underestimate.

- keep pushing – to create a learning culture

The other thing that I think having an Academy has done, is either because of or in spite of, has created a learning culture. So you have got two things. The Academy keeps pushing and doing

things and whatever. Those BUs who haven't bought in enough, feel they almost have to compete and create their own things. Either way it's all in the interests of development one way or another.

After five years there is more partnering on initiatives, and so buy-in is established before programmes are designed and implemented.

10.8 Role of the Academy in influencing culture

Culture is influenced by leadership and by visible and invisible structures such as policy, operating procedures, values and measures.

Programmes and initiatives within the Academy portfolio are strongly led or influenced by leadership – especially senior leadership. In addition to this, the philosophy of systems thinking and action learning – as well as the approaches of ensuring diverse classes with representatives from all business units – is in place with the intention of influencing the way things are done in the Group. Feedback on the contribution and influence on culture is given below.

A senior director's insight:

- Academy as a bridge between BUs

And that has been fantastic to see that bridge created now between the BUs specifically on training development and, let's say, the Academy, which really is operated out of the corporate office.

Feedback from a managing director:

- Academy links to the Group values

I think the Academy has supported the culture in terms of 'our people are important'. Developing our people ... I mean it ... gives life to some of what we say. ... I mean, the Academy links to a lot of the values of the Group in fact. Because it's about people, it's about excellence, it's about transformation. You can sort of carry on. So, I would say that it's one of the ways that we give meaning to our values. So, certainly the Academy is doing that well.

Response from a managing director:

- impact on networking across business units

The Academy has ... assisted Group Five's culture more than anything else because of the network, no doubt. So, outside of just the learning environment, the networking is huge. I could see it with our guys interacting with guys from other business units which certainly wasn't the case pre-2006.

Feedback from a managing director and an HR director:

- synergy across Group Five

And I think a huge benefit of having the Academy is that the different business units and the management get to interface with each other, get to understand the businesses differently. And we are finding more synergy running across the Group.
It's much more of a one culture. Or, people operating in the different business units are definitely more focused on the Group Five culture than the internal culture that was present in those business units. Even though they are still very protective around it, there is a sense of, but we are part of a bigger whole and that's what that whole wants us to behave like, absolutely. And I think the Academy is instrumental in driving that, or has been.

Alignment of leadership development across the Group ensures that one leadership language and toolbox is used by all. Consistent leadership views have a significant impact on organisational culture in that employees are given similar opportunities to grow and develop.

On the 6th August 2008 HR, exco and manco attended a SLII programme presented by Ken Blanchard Company. The programme is now scheduled to be rolled out to the rest of the organization by means of an internal trainer.

(Board Report Aug 2008)

Starting at the most senior levels for Group-wide roll-outs ensures a speedier uptake as seniors support the programme and more junior people aspire to it and are also 'pressured' to follow their leader's example.

Comment from a managing director:

- developing a learning culture through planned learning

I think that the Academy certainly has changed [the culture], and what has evolved is really that whole learning side, I mean it didn't exist prior to the Academy. There were different elements. If I look at spend, I don't think we, as a business, had spent a hell of a lot of money other than on senior managers historically. I mean, you would send all your senior managers on accountancy, or finance for non-financial managers or leadership courses, with no real thought process. I think that's the good thing about the Academy – is the way the thought processes happen. And it's not a bunch of us sitting there, I think it's people within that environment that are thinking about it. Which [are] people with MBAs that have a passion for learning, which [are] the right people. Historically it was like ad hoc, "Oh, we need ... oh, we see the guys are battling with this, send them all on a course". And I don't think we ever invested in the youth at managerial level that we are now.

A senior board member provided insight:

- getting the right people into the organisation and retaining them

I think it [the Academy] obviously attracts individuals who are looking for that type of organisation, so automatically you are starting to fill the organisation with young blood that has that type of forward process and because the benefits have been demonstrated, the existing employee base can see the benefit. So, I think it's allowed an existing base to be transformed a little bit and it's definitely encouraged new feed into the organisation. I mean, the number of times I've interviewed people where the Academy has come up as a point of discussion.

Feedback from a senior board member:

- value of people development an investment in the future

I think the Academy has been probably … the point of connectivity for all of Group Five and it's the only place where that happens. And it's the next generation generally that has been trained and exposed to this, so the Academy, I mean it's influence on the future of the organisation I think is ... we haven't measured that, it's difficult to measure. But when you have got a collegiate environment that is engendered from students working together at a young age, and that is the future leadership of the Group. In the next three, four, five, six, seven, eight years, if you like, when those people start to get through to places of more authority, they don't have the culture of silence, that possibly the current generation or the previous one have, I think that is a huge opportunity for change in culture, just through the very nature of it. Everyone has been through the same programme, they've had a collegiate environment in training programmes that they ... that they are taught to do things and think very much more common, with a common goal and common theme. So, I think it has influenced the organisation absolutely. To become an attractive employer when you see that ... how do you measure all that. I don't know how they actually do it on the external side, but the fact that we even

The majority of feedback indicates that the Academy has contributed significantly to the culture of the organisation but that this is also work in progress.

10.9 Learning culture supports further learning

To build a learning culture you need an environment that sees the value of learning and actively supports it, particularly from a learner and a line manager perspective. In order to achieve this, the outputs need to prove the value, and over a period of time critical mass can be achieved to make an impact on organisational culture.

Discussion with an HR director:

- getting to critical mass – 'old' students selling learning to new recruits

I think all that groundwork, all that prep work, has been done and it's now able to be the cookie cutter approach. 'We've done it, just come and get your training and off you go'. So, I think now we're able to run greater numbers of people without developing [material]. So, I certainly think the impact is greater now because of that.

Do you think it could also be the fact that we've got enough of a cadre of people that are sort of alumni? So they support the others?

Oh, that's a very good point. ... They are seeing the benefit for themselves and therefore for the others they have got no issues at all to recommend.

In some business units the learning culture has grown and is well supported by management and staff alike.

Comment from an HR director:

- culture of support for learning

> *We have a culture here where we make it known and we reinforce continually that we are interested in your development. It has to be relevant, it has to be mutually beneficial, but we want to see you grow.*

Aligning thinking and behaviours as regards the value of operational knowledge as well as management and leadership competence development, is an important driver from an executive perspective. The capacity of the Academy has grown from developing unemployed people who arrive at construction sites seeking work, to developing directors.

> Feedback from a senior board member:
>
> - from entry level skills through to executive development
>
> *So, we began with executive training but the idea was to get operational knowledge ... in other words, it became a basis for the receptacle of knowledge of how we do things in Group Five. And I think as you broadened the curriculum, that's been now developed. So we go right from, well now, People-at-the-Gate stuff as we said, right through to MBAs. So we have been on a long journey and it's not been easy, I'm aware of that.*

Learning for the sake of learning is not sustainable. Ensuring that the Academy supports the strategy is the first and foremost focus; this is followed by linking into the performance management system and ensuring that we are developing people along a career path. Whilst this is still very much work in progress and needs to be supported by line managers and HR in the business, this process allows the Academy to respond to needs in the business in a coherent and structured manner.

10.10 Concluding thoughts on organisational culture as a norm

Both the Academy and the leadership in the organisation have a role to play in building a learning culture. For the leadership this includes the high-level vision and values which support a belief in learning, as well as the structures and policies which provide the 'structure' that encompasses learning. Leadership also needs to communicate on all levels that learning is necessary and is supported. This, over a

period of time and through practical demonstration, will grow the learning culture. The role played by the Academy is one of supporting leadership with their learning requirements, and then in turn supporting individual learners through providing the right programmes at the right time. The Academy also supports the learning culture by having the right systems and policies in place, and by communicating broadly through the business.

In this chapter, the old culture and the current culture were highlighted through interview feedback. Part of the role of the Academy has been to change the culture to one that is more learning oriented. Over a period of time, the critical mass of learners has increased and a gradual change has occurred, which have put pressure on senior leadership to 'move' with the momentum and provide further learning opportunities so as to enhance the learning culture and ultimately the organisation's competitive advantage.

10.11   Conclusion to the sixth and final theme of the case study

Organisational culture as the normative domain is the final element of the complex web of relationships, and brings to a conclusion the case study and themes which have unfolded over the last six chapters. The original question regarding the role of organisational behaviour in establishing a corporate university and looking at how a corporate university influences the learning culture in the organisation have been part of the discussion as each separate element in the complex web of relationships was examined. The evidence provided to support each of the chapters was gathered from interviews as well as from archived documents and minutes. These findings are triangulated and enfolded when discussing literature in the next chapter.

Researcher's reflexivity points:

The surprise

From the very first invitation sent out to senior management to vet a project management programme service provider to the regular student presentations, it was always a surprise to see the enthusiastic and loyal support given to learning in the organisation. Whilst managers are very demanding and clear when you are not making the grade, they are equally willing to give of their time and support even if this is after a long-haul flight or after one to two days straight of pouring concrete (24-hour commitment).

Comparing the culture

I have had extensive experience in working with large companies – from the outside. If I compare the culture of other organisations with that which predominates in Group Five (a very real belief in learning, a belief that they as leaders need to support learning and need to create the environment and the space), I must say that this differs from my experiences in other organisations where, in some instances, learning was seen as imposed and therefore to be resisted. In other instances it was seen as the chance to take time off (learners arrived, signed the attendance register and were gone by morning tea time).

Networking at management level and some mistakes to avoid

Engaging with management, always keeping them informed and taking careful note of their concerns or guidance is a sure way of winning their support when you need it. If there are issues – be honest and up front proactively. This was experienced when a service provider left us stranded and could have derailed our very successful junior management programme. I made the decision and got buy-in from our team that we would advise all stakeholders of our 'mistake'. We communicated comprehensively to all, both by blanket communication as well as by subsequent targeted communication. Where we could have lost confidence, we ended up gaining trust and support. Even the students that were impacted have become the most loyal of supporters. Another mantra that resulted from this experience is "what happens does not matter as much as how you handle it".

11   DISCUSSION

11.1 Introduction

In this chapter, the findings of the case study are triangulated against literature. For the sake of clarity the framework that surfaced in the case study (see Figure 58: Complex web of relationships (consolidated view)) is used as a guideline for the discussion.

Firstly the role of organisational behaviour in this framework will be discussed, followed by the separate elements or themes: context as a catalyst prompting a structured approach to learning and development; leadership as a critical role player in creating and sustaining a learning organisation; Academy has a key role in driving learning in the organisation; individual as a recipient and beneficiary; key stakeholders and role players in the implementation of learning (human resources, learning and development, and line managers); and culture as the normative domain. The chapter concludes with a review of the themes discussed and the high level of relevance of organisational behaviour as a component of establishing a successful corporate university. This leads into the next chapter which provides some propositions that encapsulate the learning that has emerged from this research and that has relevance for other organisations pursuing a similar path.

11.2 The role of organisational behaviour in this framework

This section examines the interface between the establishment of an Academy and the associated constructs of behaviours as structured within the field of organisational behaviour. All three organisational behaviour levels (individual, group and organisational) have a role to play in creating a learning environment in the organisation, and this is triggered by the external socio-economic environment, depicted in the framework as 'context' which provides the catalyst as well as the shifting backdrop against which learning occurs.
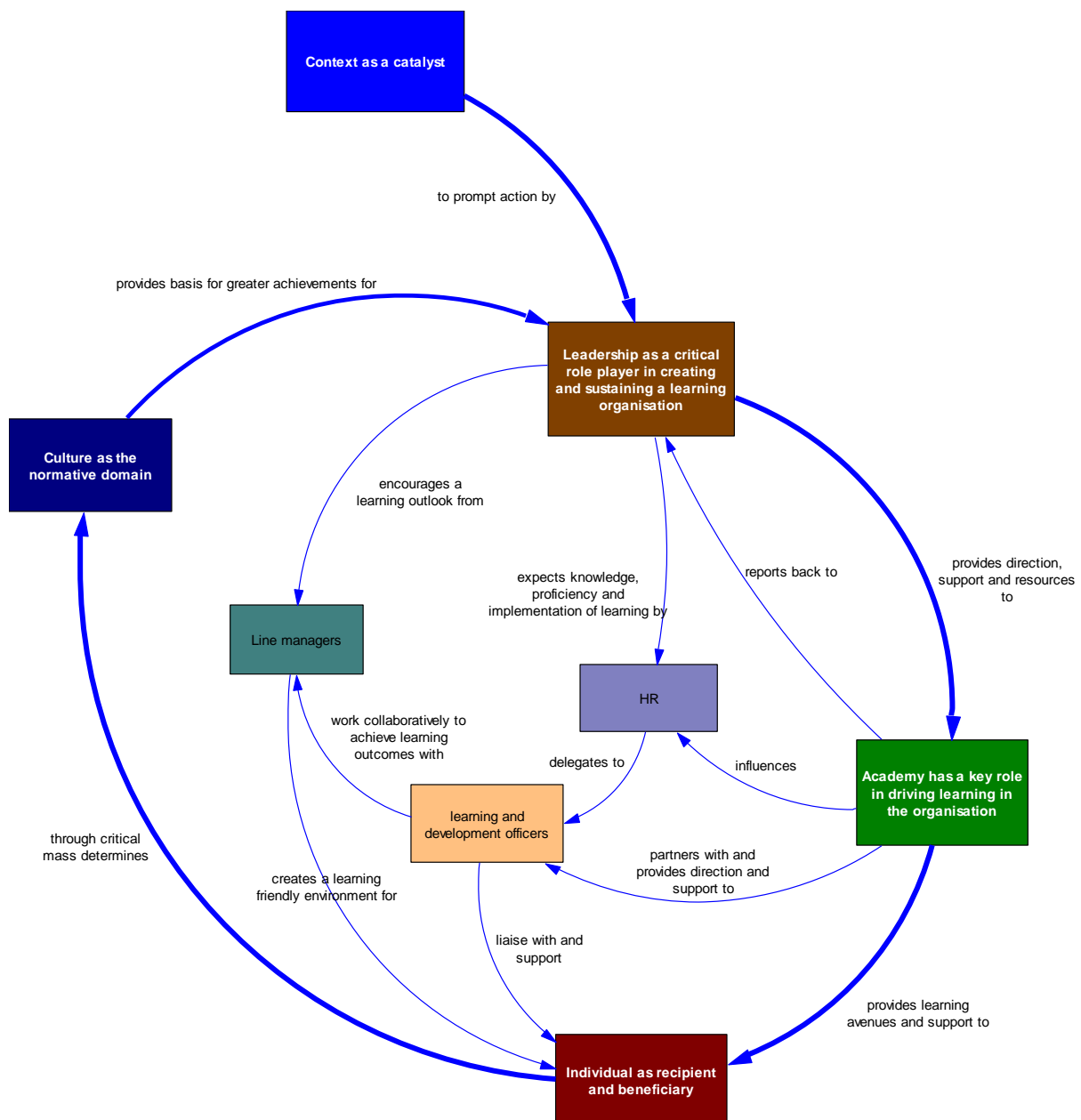
Figure 58:   Complex web of relationships (consolidated view)

As introduced in Chapter 4, the framework (repeated below in Figure 59: OB levels in web of relationships) indicates how the three organisational behaviour levels emerged in the study and where the various elements of the framework (see Figure 17 on page 99 and repeated in a consolidated form above in Figure 58: Complex web of relationships (consolidated view)) are represented as viewed from a high-level perspective.
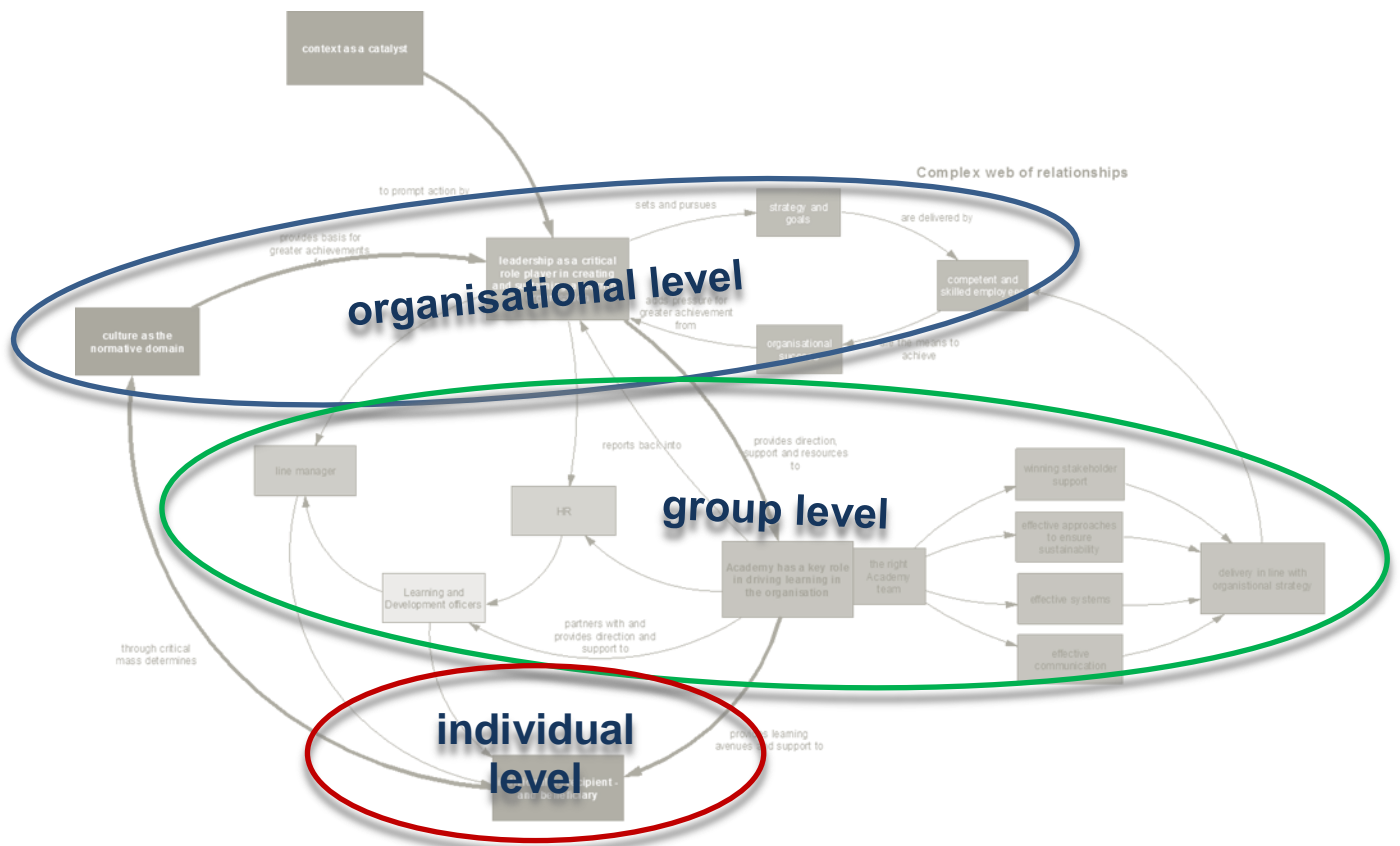
Figure 59:   OB levels in web of relationships

Organisational behaviour seeks to understand why and how organisations develop regulating mechanisms, and to identify the influential factors in this process. In simple terms, organisational behaviour is the study of individual behaviour, group dynamics and then also the ultimate normative impact at an organisational level. More formally, organisational behaviour is: "an academic discipline devoted to understanding individual and group behaviour, interpersonal processes, and organisational dynamics with the goal of improving the performance of organizations and the people in them" (Schermerhorn *et al.,* 2008:5).

Behaviour within an organisation has critical relevance for economic and sociological reasons as the world continues to change and re-invent itself at every turn (Rousseau, 1997:536-7). Organisations like Group Five are comprised of people – not edifices – and it is through an understanding of our people that management can best prepare to meet the challenges of a turbulent and increasingly uncertain future, which is particularly pertinent to the construction industry where business is cyclical in nature and therefore even more sensitive to the economic environment. Management use knowledge to increase productivity, improve customer service or meet other key organisational needs, and this is best facilitated through a thorough understanding of people skills, competencies and motivations. Similarly, structures and processes need to be aligned to strategic imperatives to foster a cohesive behavioural environment conducive to co-ordinated action.

Group Five, as mentioned in Chapter 4, is an integrated construction services, materials and infrastructure investment group operating in Sub-Saharan Africa and Eastern Europe. It employs upwards of 10 000 people, has a strong and respected brand, and an annual turnover that exceeds R8 billion. The organisation was moving toward working on mega multi-disciplinary projects in 2006 and needed to shift ways of thinking and behaving in order to create and sustain growth. This prompted the need for an Academy.

Much of the traditional literature on corporate universities follows a process approach suggesting structures, policies, governance, team composition, etc. Since a corporate university is established within an existing organisation, it needs to be mindful of business imperatives (strategy, finance and economic environment) as well as of cultural norms. Achieving this integration seamlessly and providing a valuable and visible contribution to the organisation are not achieved without support, trust, confidence and the enthusiasm of employees and organisational leaders. Behavioural aspects are therefore just as important as the process steps. This study has brought to the fore a number of behavioural elements which are either ignored or dealt with as a peripheral aspect in research to date on establishing corporate universities. These behavioural elements have been discussed as themes throughout the case study (Chapters 5 to 10), and the summary of the contribution at the different levels is expanded on below.

The establishment of an Academy goes through a series of phases; firstly the conception and perception of need, secondly the introduction and early implementation, thirdly the maturation phase. It could be argued that different behaviours are needed at the different phases, however, these behaviours will be consolidated at the different organisational behaviour levels (individual, group and organisational) so as to take a holistic perspective.

11.2.1 Establishing an academy – an individual perspective

Individuals comprise the organisation, and the observed collective behaviour is usually strongly influenced by the internal and external environment. Where there is a mismatch of the needs of the individual and the demands of the organisation, conflict and dissatisfaction could inevitably result.

Behaviour required at an individual level to establish a learning orientation is noted by Fulmer and Gibbs (1998:177) as being: quick learning, lifelong learning attitude, self-directed, sharpening of knowledge, on-the-job learning, constant reframing, and contribution to the organisation. From a case study perspective the behaviours which emerged were lifelong learning attitude, self-insight and perception, personal flexibility and adaptability. It must be noted that the individual -level behaviours were surfaced once all the data collection and analysis were completed, so this aspect needs further research.

11.2.2 Establishing an academy – a group/team perspective

Groups or teams exist in all organisations and are frequently the vehicle for achieving the more complex organisational goals. In this study, the Academy was viewed as a team, while HR and L&D were considered more as two disparate groups. Line managers move between being individuals and groups, and occasionally in some business units they operate as a team.

Behaviour required at this level to establish a learning environment (HR, L&D and line managers) include: role model leadership, providing an environment that supports learning, providing learning opportunities, open communication, and

commitment to people development. In addition, Senge (1990) suggests active listening skills, avoiding premature conclusions, and balancing inquiry and advocacy. From an Academy perspective, behaviours by the team need to be specific and focused and could be summarised in terms of a general mind-set of being proactive, strategic, centralise centric and customise oriented.

11.2.3 Establishing an academy – an organisational perspective

Individuals and groups interact within the structure of the formal organisation. Structure is created by leadership to establish relationships between individuals and groups, and to provide systems and order that direct the efforts of the organisation into goal-seeking activities. Behaviour is influenced by the patterns of organisation structure, technology, leadership styles, and systems which are pervasive in the organisation. The collective leadership of the organisation facilitate the creation of the culture, and more particularly, a learning culture. Martin (2004:412) notes: "Organizations are by definition collaborations of their participants. Therefore, even if a representative of an organization is in a strong position, he or she will act in a particular social context, which inevitably shapes his or her actions".

Jamali, Khoury, and Sahyoun (2006:339) propose six characteristics of post-bureaucratic learning organisations, namely, empowerment, teams, trust, communication, commitment, and flexibility. Jamali *et al.* (2006) further argue that these six characteristics can facilitate the gradual transition towards the five core disciplines of learning organisations (Senge, 1990) which are personal mastery, mental models, shared vision, team learning and systems thinking.

Establishing an Academy requires the careful integration of considerations at all three organisational behaviour levels (individual, group/team and organisational) in order to create a learning organisation that is responsive to the external environment or context.

11.3 Organisational context as a catalyst

The first element in the framework is 'context', which acted as a catalyst to prompt action by leadership. The importance of context in organisational behaviour studies is noted by Johns (2006:386) who states that context can have a subtle yet powerful impact on research results. This concern is shared by others, including Rousseau and Fried (2001:3).

11.3.1 The role of environment in triggering a 'sea change' to learning

The case study indicated that prompts in the South African context catalysed thinking around establishing a structured approach to learning. A senior executive who reflects back, notes that the CEO could see growth opportunities in the sector but that the Group needed higher-level skills to take the organisation to a new level. This sentiment is echoed by Jamali *et al.* (2006:347) in the quote below regarding the pursuit of excellence to achieve increased competitiveness:

> In a global, fast-changing business environment, competition is becoming fiercer and the predictability horizon shorter. Survival and excellence are becoming harder though critical for all firms. Adaptation is necessary yet insufficient. Organizations in this new environment are inclined to abandon their traditional bureaucratic orientation and embrace a range of characteristics revolving around empowerment, teamwork, trust, communication, commitment, and flexibility. They are also actively exploring new models that support the pursuit of excellence and offer prospects for increased competitiveness.

It is widely acknowledged that the world of business has changed significantly in the last 20 years (Barley, 1998:9; West, 1994:30; Altman & Iles, 1998:45) and this shift has caused discontinuity, uncertainty and increasing complexity (Altman & Iles, 1998:45). To respond to this shift there is the suggestion that organisations need to learn faster (De Villiers, 2008:13; Marquardt, 1996:2) and pursue new or superior knowledge (West, 1994:30; Rademakers, 2005:135) in order to attain competitive advantage (Altman & Illes, 1998:45, De Villiers, 2008:13; Rademakers, 2005:131-2; West, 1994:30).

In addition to the short life cycle of competitive knowledge (Rademakers, 2005:132) and high rates of change experienced globally, South Africa also has challenges

which include a shortage of technical skills, a deficient education system, emigration of skills, low productivity levels, internationally uncompetitive industries, high crime rates, and high HIV-Aids rates which all impact on strategic competitive capabilities of South African organisations (Pillay & Wijnbeek, 2006:29).

Gaining and sustaining superior knowledge requires considerable effort (Rademakers, 2005:131) as well as the direct engagement of business leaders to provide an inspirational vision and new goals (Dunphy, Turner & Crawford, 1997:234). The effort to gain superior knowledge needs to be structured and co-ordinated in order to enable organisations to learn rapidly, effectively and achieve transformational change.

Findings from the case study indicated that the South African context of impending economic growth in the construction industry in the mid-2000s prompted the need for the creation of a learning environment within the Group in order to maximise strategic competitive advantage. Senior executive reflections from interviews conducted as part of this study indicate that there was a clear anticipation of a construction 'super cycle' and a concomitant realisation that there was going to be huge skills shortages. The construction industry is highly geared and needs to have a good track record to access additional funding. An executive recalls the challenges at the time due to concern about the competence of the sector as a whole, "because the bankers won't put guarantees up".

The realisation that a different approach was necessary to achieve improved outcomes became clear to the leadership of the organisation, and the decision was taken to provide some structure to both individual and organisational learning. This strategic initiative was led by the CEO designate who provided the vision and goals with the express intention of creating a learning organisation.

11.3.2 Defining and clarifying the term learning organisation

The term was first noted by Garratt in 1987 (in de Villiers, 2008:11) but to date there are a number of different definitions for the concept. Senge (1990:3), perhaps the most well-known of proponents, defines learning organisations as "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 to learn together". He delineates five disciplines which define the ideal learning organisation, namely, personal mastery, team mastery, mental models, shared vision, and systems thinking.

Marquardt (1996:2) provides the following concise definition which makes a direct mention of the link to the changing environment: "... learning organizations are companies that are continually transforming themselves to better manage knowledge, utilize technology, empower people, and expand learning to better adapt and succeed in the changing environment".

Watkins and Marsick (1993:8) provide a more detailed and behaviourally focused definition: "The learning organisation is one that learns continuously and transforms itself. Learning takes place in individuals, teams, the organisation, and even the communities with which the organisation interacts. Learning is a continuous, strategically used process integrated with, and running parallel to work. Learning results in changes in knowledge, beliefs and behaviours. Learning also enhances organisational capacity for innovation and growth. The learning organisation has embedded systems to capture and share learning".

The question then remains – is the concept of a learning organisation indeed a scientific concept or merely popular fiction? At this juncture it is worth noting a comment by Dunphy *et al.* (1997:233) that "[o]ne of the basic requirements for making advances in science is that concepts acquire agreed meanings; on this criterion the concept of the learning organization ranks more on the level of an ideological slogan than a meaningful scientific term". Dunphy *et al.* (1997:236) then provide a definition of their own for the learning organisation which focuses on performance. They define the learning organisation as "one which develops and maintains competencies both to perform and to change the organization to maintain or improve performance".

The definitions above all imply processes rather than 'static states of being', with a strong implication in all of them around required behaviours. For the purposes of this study, the definition provided by Watkins and Marsick (1993:8) is considered the most comprehensive and unambiguous.

In an interview for this study, the CEO, when reflecting back on 2006, noted that the Group was not a learning organisation, and this was confirmed in interviews with senior management who observed that the organisational culture at the time was "quite a harsh command and control" one. The CEO designate was commissioned to change the culture into a more learning-oriented environment.

Whilst there is a wide range of academic views on the concept and definition of a learning organisation, to the point where some critics suggest that a learning organisation is a myth, the leadership of the Group realised that turning the organisation into a learning organisation would be beneficial because the external environment offered rich opportunities for those with the requisite skills and competence.

11.3.3 The unique journey towards a learning organization

There is consensus in many circles that organisations are indeed able to and in fact need to learn (Garvin, 1993:78; Jamali *et al.,* 2006:337). However, each organisation undertaking the journey towards becoming a learning organisation starts out with a unique history, skills base, economic challenges, culture and vision of the future. This suggests that the recipe for success, therefore, would be similarly diverse (Marquardt, 1996:179). Andresen and Lichtenberger (2007:110) note that experiences of learning architectures in Germany show that they are closely aligned to the organisational environment and strategy, and they further suggest that each organisation undertaking a journey towards becoming a learning organisation follows a very different path.

Garvin (1993:81) suggests that organisations need to become skilled in five main activities (systematic problem solving; experimentation with new approaches; learning from their own experience and past history; learning from experiences and

best practice of others; and transferring knowledge quickly and efficiently throughout the organisation) and in three stages (cognitive, behavioral and performance improvement). Jamali *et al.* (2006:339) provide six characteristics (empowerment, teams, trust, communication, commitment and flexibility), whilst others emphasise collective learning or experience as the path to take (Marsick & Watkins, 2003:135; Yukl, 2009:49). Yukl (2009:49) suggests that successful application of new knowledge includes *institutionalising* it to ensure that it is retained for as long as it is relevant.

The concept of institutionalising knowledge is supported by West (1994:30), with the caveat that many Western organisations operate within the confines of short-term and financially driven perspectives. She suggests that formalising the learning organisation concept will balance resource implications with tangible benefits albeit in the longer term.

11.3.4 The academy as a vehicle for institutionalizing a learning orientation

One way to structure learning in the organisation is to establish a 'corporate university'. In discussing *purpose,* Andresen and Lichtenberger (2007:110) state that "a corporate university is a company-owned learning institution ensuring an education that is directly relevant to the business", and Wheeler (2005:6) notes that executives are in agreement on the value of structured learning based on statistics which indicate that talent, innovation and productivity of a high level are found in organisations that "grasp the meaning of learning at a deep level" and act on it.

Wheeler (2005:6) says that the "corporate university is not primarily about how to deliver learning or how to carry forth the organization's culture – rather it is about an emerging multi-disciplinary view of learning as a key factor in organizational success." He does, however, pragmatically suggest that there is a daily challenge to see material results or outcomes which impact on the bottom line, and that, as such there should be a direct and measured impact on the business performance of the organisation (Wheeler, 2005:6).

In 2006 the CEO and a small team of executives explored the options of establishing external partnerships with business schools as well as putting together a proposal for an in-house 'corporate university'. The proposal was accepted by the board and the Head of Academy was appointed in July 2006. The initial focus was on the development of talented young engineers in managerial and leadership skills but this scope rapidly expanded within the first six months as the South African economy boomed.

11.3.5 Building capacity for sustainable competitive advantage

Superior skills are a primary enabler for sustainable competitive advantage, and a corporate university that bears responsibility in large part for the training and development of employees can support organisational success through providing development that enhances organisational achievements (Meister, 2006:28).

In short, the primary purpose of a corporate university is to build knowledge and capacity that support the achievement of the organisational strategy (Andresen & Lichtenberger, 2007:110), and the development of core competence will provide the basis for the achievement of long-term competitive advantage (Barley, 1998:9; Dunphy *et al.,* 1997:235-6). In a rapidly changing world, however, this becomes a constant work-in-progress.

The corporate university that was launched in July 2006 became widely known in the Group simply as The Academy. It grew over the five years to a total of 11 full-time staff and with a satellite Construction Skills Training Academy with a further four staff members. The portfolio of programmes increased exponentially because of the enormous pressure of needs expressed by internal stakeholders.

The leadership of the organisation had responded to the need in the external environment and they provided the leadership and the guidance for the Academy's establishment and growth.

11.4 Leadership as a critical role player

The second theme in the framework is 'leadership' which is a critical role player in creating and sustaining a learning organisation, and which provides direction, support and resources to the Academy.

11.4.1 Leadership to support learning as a critical success factor

One of the clearest requirements to emerge from both the case study and literature is that a corporate university needs to be supported by the CEO and top leadership of the organisation (Dealtry, 2001a:216; Gould, 2005:514; Marquardt, 1996:183; Marsick & Watkins, 2003:132; Rademakers, 2005:135; Wheeler, 2005:45; Yukl, 2009:50). A strong case is also made for a CU 'champion' with the preference for this to be the CEO of the organisation (Dealtry, 2001a:216; Marquardt, 1996:183; Yukl, 2009:52).

The role of top leadership includes modelling or 'walking the talk' (Marquardt, 1996:183; Ulrich, Jick & Von Glinow, 1993:66) by being learning participants, as well as playing active roles in facilitating sessions, and publicly encouraging and supporting the learning vision and culture of the organisation (Dealtry, 2001a:215-6; Marquardt, 1996:96; Marsick & Watkins, 2003:132; Ulrich *et al.,* 1993:61-66; Wheeler, 2005:42; Yukl, 2009:50). In Group Five, the CEO and executive members regularly attend launches and graduations, act as guest speakers, and sit on panels to view learner presentations. In addition to this, they also attend in-house workshops as learners.

Yukl (2009:50) notes simply that "[l]eaders can directly encourage and facilitate collective learning by what they say and do", and Rademakers (2005:135) further suggests that "[s]upport is needed [for the CU] to be accepted as a serious partner".

11.4.2 Organisational learning restrainers

Yukl (2009:52) does caution by highlighting three particular obstacles to the process of organisational learning over and above lack of management commitment, and these include a restriction on information and learning that facilitates collective

learning, 'siloed' business units that create barriers to learning and cooperation, and finally conflict amongst various stakeholders. He notes that building a culture of learning requires that leaders work together to overcome obstacles. In the case study one of the three challenges was experienced – that of siloed business units. Whilst this did pose an obstacle in other ways it provided an advantage. Some business units were quickly identified as 'early adopters' and others as being slower. The capacity of the Academy programmes was more easily spread – and early adopters were offered 'discounts' on programmes to maintain their early adopter inclination while the slower business units were targeted with the 'success stories' of the value added in other business units to encourage them to join programmes.

11.4.3   Alignment with strategy and goals for a 'good fit' with corporate needs

Organisational strategy and goals are achieved through the efforts, competence and capabilities of individuals. Thus, enhancing the latter should augment the outcomes for the company. Grant (1991:114), in a slight change of focus, notes that there are two main organisational strategy paradigms: one is an external 'competitive forces' view on risks and opportunities, and the other is an internal view of resources and skills. He argues for competitive advantage through the organisational resource base, strongly advocating exploitation of the organisation's resources and capabilities relative to external opportunities.

Leaders of the learning function should be clear on what the current organisational strategy and goals are. With the direct input and support from top management, there should then be close alignment on the learning strategies of the corporate university to ensure "real-time, real-world, global perspective(s) on all its activities" (Dealtry, 2001a:216). If the corporate university is to achieve the goal of enhancing organisational capacity for growth, there needs to be a direct input into the focus and direction of the learning agenda from senior management (Arnone, 1998:200; Campbell & Dealtry, 2003:370; Dealtry, 2002:209; Dunphy *et al.,* 1997:232; Holland & Pyman, 2006:19; Marsick & Watkins, 2003:132; Nixon & Helms, 2002; Prince, 2003:181; Rademakers, 2005:135; Wheeler, 2005:10-11). The outcome should be a "good fit with corporate needs" (Rademakers, 2005:135) which ensures validity and viability for the corporate university.

The Academy made a great deal of effort to network at senior level and to gain access to the higher-level corporate strategy as well as the detailed business unit strategy. This was done either by direct engagement with senior leadership or through orchestrating facilitator briefings by senior management. In addition to this, a number of programmes covered strategy as a topic, and executive leadership were frequently invited as guest speakers. The Academy strategy was then formulated formally on an annual basis with the entire team taking part. This led to a dynamic strategy with inbuilt flexibility as the whole team understood the basis for the strategy and was able to adapt as the external influences in the organisational environment shifted. For example, as the realities of the Construction Scorecard started to take shape, a training programme was designed with a supporting e-learning programme, and this was rolled out to senior management and to targeted individuals. A second example is, when it was realised fairly early on that project management skills would need to be radically improved in the organisation, a programme was sourced at university level which specialised in built environment methodologies.

11.4.4 Competent and skilled employees to execute strategy

Competencies required for competitive advantage relate in some degree to the strategy paradigm (Dunphy *et al.,* 1997:237-8; Grant, 1991:114). The competitive forces view implies an external scanning of the environment along with a flexible capability that responds to opportunities in the external competitive milieu, whilst the resources view relies on building 'distinctive competence' in a specific area. Whatever the approach, there is agreement that competent and skilled employees are required to execute the chosen strategy and that competitive advantage invariably lies with those businesses that develop these deep core competencies (Dunphy *et al.,* 1997:240-2; Grant, 1991:116; Marquardt, 1996:74-5; Murray & Donegan, 2003:52).

Feedback from senior executives indicates that learning was considered a key aspect to grow competence from the outset and that the Group would never have contemplated undertaking multi-disciplinary projects or indeed putting younger, comparatively less experienced individuals into responsible roles without first

11.4.5 Organisational success through competent and skilled employees

Organisations have very particular requirements that are frequently not met by generic commercial training, as identified by Lenderman and Sandelands (2002:382): "We in the business world have known for a long time that we have to pick up the pieces of learning that our new employees bring us and add to these pieces what is essential to running our individual businesses".

General organisational requirements from employees have been identified as: the need to achieve consistently high-quality outputs; the need to manage continuous changes in technology; a service orientation; the management of constant change and uncertainty; and the management of the impact of globalisation (De Villiers, 2008:13; Ulrich *et al.*, 1993:54). To meet these needs, capacity needs to be developed. Building the competence and skills of employees requires a structured approach to learning with a keen eye on the future needs of the organisation – a learning organisation orientation. In turn, Abu and Rawabdeh (2006:471) note that a focus on learning and development is the one clear indicator of a learning organisation. Ulrich *et al.* (1993:54) suggest that by "enlarging its capacity to learn, the organisation increases its chances of success". This is supported by Gilley and Maycunich (2000:106) who state as follows:

> Learning organizations understand that learning is the foundation upon which success is built. Employees who continually improve learning capacity are the building blocks that support improved organizational productivity, market share, and profitability. Thus, learning organizations abide by a simple assumption: When the learning reservoir of individuals improves, organizational performance capacity also improves.

This view is echoed in reflections by senior leadership regarding attaining organisational success through competent employees, noting that there has been a significant value-add to the business units relative to the courses that are offered,

and indeed what the Academy has contributed has directly contributed to the achievement of the organisational strategy.

11.4.6 Organisational success adds pressure for greater achievements from leadership

Organisational excellence is a constantly moving target, and with each improvement cycle new aspirations emerge, presenting leadership with higher targets for greater achievements. This is in alignment with a constantly shifting environment of increasing competition, more complex customer requirements and more career-focused employees.

11.5 Academy has a key role to play in driving learning

The third and main element in the framework is 'academy'. It is a formal structure that has a key role in driving learning in the organisation and providing learning avenues and support to the individual, as well as in influencing HR and partnering with and giving direction and support to the learning and development officers in the organisation.

11.5.1 The corporate university as an 'umbrella' entity

Learning is dispersed throughout the organisation – in classrooms, on the job or via e-learning. The corporate university provides the overall umbrella that integrates all learning in a structured manner (Barley, 1998:12; Gould, 2005:509;). Group Five senior managers' comments regarding the impact of the Academy indicate that the Academy has become entrenched in the Group and has established a culture of learning that people are able to buy into. This feedback ties into the definition of Watkins and Marsick (1993:8) of a learning organisation (see section 11.3.2).

11.5.2 Academy has a part to play in transformation

The corporate university is visualised by a number of experts as a *process* rather than as a programme or a place. Meister (1994:30) notes that the corporate university is "a process where all levels of employees, as well as key customers and

suppliers, are involved in continuous lifelong learning to improve their performance on the job". This is echoed by Barley (1998:20-1). Each corporate university is unique with no single 'ideal' form existing – but rather each needs to be embedded in the culture and idiosyncrasies of the host organisation (Rademakers, 2005:135). Garratt (2011:28) provides a 'survival' formula which proposes that the 'rate of learning' needs to be equal to or greater than the rate of change to ensure survival, suggesting that unless organisations are able to learn they will not progress forward sustainably.

In the case study there is agreement that implementing structured learning in the construction industry is very difficult since employees do not have regular schedules, they often work on projects in remote locations in difficult conditions, and their workload can change overnight. Programmes need to be structured to take these circumstances into account and, in addition, they need to deliver immediate demonstrable practical value. The Academy has succeeded to the point where its role has transitioned from providing a development structure for the entire group, to a more transformational role of driving culture and change in the organisation.

11.5.3 Alignment to strategy

The foundational concept underlying the corporate university construct is the need to align learning to the organisational strategy, and this needs to be visibly demonstrated as it ties employee development to corporate success (Barley, 1998:24; Gould, 2005:10). Wheeler notes that corporate education should focus on closing skills gaps that have been established between the envisioned future and the current state of the organisation (Wheeler, 2005:71). This is the mission of the corporate university (Barley, 1998:24).

An important group strategy is ensuring that people support the technical streams of the business and that the larger group works in unison to achieve set targets. Not only does the Academy provide learning opportunities but through forward-thinking methodologies it contributes to breaking down the business unit silos. Thus an important contribution is fostering the creation of a united Group. This was

summarised by a senior manager as having people with the right skills, ready at the right time and then working together united by a common cause.

11.5.4 Challenges and assumptions

> All too often assumptions are made in error that the corporate university as an agent platform for development will be welcomed with open minds universally across corporate empires. In fact it is one of the most difficult people, organisational and business development platforms to introduce successfully. It has to find an organisational locus and position in the firm's psyche that is unique. It has to be seen as a viable but heterogeneous high return on investment activity that acts as a magnet to all those people who want to do something or in a position to do something going forward.
>
> <div align="right">Eccles (2004:410)</div>

Becoming a learning organisation requires a cultural shift, and introducing a corporate university is neither synonymous with the learning organisation concept, nor is it a guarantee that a learning culture will be created. Further, as Eccles (2004:410) states above, the implementation of a corporate university is fraught with assumptions that need to be recognised and managed cautiously. Wheeler (2005:21) expands on this concern with the comment that "[n]o organization, function, or department can successfully implement change or achieve its goal unless its long-term purpose is clearly defined. Ideally, a corporate university is launched with a specific mission aligned to help the organization achieve its business objectives". According to Barley (1998:9), even conceptualising a corporate university is difficult because the specific mission varies from company to company and, in addition, the corporate university needs to 'change its shape' to remain constantly relevant.

The point made by Eccles (2004:410) holds true for the early Academy experiences. One senior manager remarked that the task would have tested even the most resolute person, and the positive attitude that was maintained by the Academy team, in the face of skepticism, was a critical success factor for the Academy.

Where then is the starting point for establishing a corporate academy once management support is in place?

11.5.5 The right Academy team

> We have seen that it requires a team of people with a unique blend of transferable management skill-sets in organizational capability development, communication and information technology systems and content and business acumen, who can mobilise and co-ordinate the specialist and functional resources to provide the learning infrastructure, opportunities and evaluative systems that will simultaneously satisfy the ambitions of both the employer and the employee. The outcome objective being to create a vibrant and cohesive learning-to-earning culture based upon a good understanding of mutual interdependency.
>
> Dealtry 2008:76)

A professional and knowledgeable team is an essential requirement (Beaver & Prince, 2001:197; Gould, 2005:515; Wheeler, 2005:37). Campbell and Dealtry (2003:372) add that the corporate university team need to understand the "new dynamics of the business and management ecosystems and to positively innovate and move forward with the times". In the case study feedback from senior management it was suggested that the Academy team were seen as highly competent and influential and that respect was earned through hard work and consistent delivery.

The skills requirements of the head of the corporate university include being able to set the strategic direction of corporate education (Meister, 1998:249), having multiple intelligences relating to organic business growth and development (Campbell & Dealtry, 2003:380), following a creative, strategic leadership style that is complementary to the visionary values and objectives of top management (Campbell & Dealtry, 2003:380), being a motivator (Morin & Renaud, 2004:305), possessing strong project management skills, and being able to engage in critical conversations (Wheeler, 2005:11). The role is summarised by Gould (2005:510) as an individual that "develops the organization's learning philosophy and strategies and continually assesses and defines the competencies the employees need to obtain in order for the business to achieve its goals. The chief learning officer is also responsible for maintaining state-of-the-art learning technology, marketing learning opportunities, and insuring the cost-effectiveness of the corporate university". The role of the chief learning officer or head of Academy is critical – as noted in the case study, it is people who are important, and having the right person as Head of Academy is essential.

11.5.6 Effective approaches

A carpet-bag approach to learning and development runs the risk of ad hoc approaches. In the case study, a systems-thinking approach was taken, supported by action-learning processes: systems thinking, because it provides an overarching philosophy which is ideally suited to business practice (Senge *et al.*, 1994:68); and action learning, because the processes engender both academic excellence and top-level business development (Dealtry, 2000:174; Fulmer & Gibbs, 1998:177; Lenderman & Sandelands, 2002:382). It is due consideration of the method of delivery that needs to precede any curriculum choices (Gould, 2005:517).

In addition to these strengths, the head of Academy and the team need to win strong stakeholder support. Whether it is through communicating the value added or through actual visible demonstration of positive outcomes by 'under-promising and over-delivering', strong internal partnerships and relationships need to be established (Wheeler, 2005:12; Gould, 2005:510). The intention is to build and maintain a commitment to employee learning by providing the platforms for the sharing and comparing of superior business knowledge and information which have the potential to improve organisational performance (Dealtry, 2001a:216), not least through the achievement of continual small 'wins'.

Internal and external stakeholder partnerships and relationships are also important to extend the Academy portfolio to include accredited and nationally recognised programmes (Barley, 1998:14,21). Case study examples of these include partnerships with universities such as the University of Cape Town and the University of Pretoria that customise programmes to organisational needs. In-house workshops are accredited with continuing professional development (CPD) points which are highly prized by our engineering learners. In this way value is demonstrated to individual learners as well as throughout the organisation, which in turn builds the overall commitment to employee learning.

On-the-job learning, with or without action learning, is a sustainable learning approach, and, when structured to make use of a network of supportive line

management, mentors and work teams, learning is faster and 'right-sized' for the learner and the work environment (Marquardt, 1996:83-4).

11.6 Individual as recipient and beneficiary

The next element in the model is 'the individual as recipient and beneficiary' that receives support from line managers, learning and development officers as well as the Academy. It is the individual that through learning becomes the foundation for critical mass to impact on the culture of the organisation.

11.6.1 Avenues of learning

> The corporate university powerfully intertwines itself with corporate vision and provides avenues for employees to become learners within their places of work while contributing to the corporation's competitive edge.
>
> Barley (1998:31)

The role of the Academy is to facilitate learning in the organisation that has direct and measurable impact for both the organisation and the individual. This learning impact needs to be seen in the workplace as the new knowledge and skill acquired by individuals that will begin to transform the workplace (Wheeler, 2005:6). The corporate university stimulates individual learning, which supports organisational goals through processes which take cognisance of prior learner experience, expectations, meaningfulness, learning styles and the need for self-determination (Altman & Iles, 1998: 47).

Stirzaker, Roux and Biggs (2011) state that on-going learning is uncomfortable and that, instead of avoiding the challenge, learning can take place if reframing and questioning are encouraged. Marsick and Watkins (2003:132) note that triggers to learning similarly are discrepancies or disjunctures which create dissonance. The choice to learn, however, lies with the learner. Sloman (2010:4) states that learning is a discretionary activity, and the learner is inclined to learn if there is the requisite individual motivation to do so.

To provide the best chances of success, the learner receives support from: the line manager in the workplace who identifies learning needs and opportunities; the learning and development officer who liaises with the line manager but also engages with the learner; and finally the Academy that provides learning programmes and support to the learner.

It should be noted, however, that organisational learning and individual learning are not synonymous (Ulrich *et al.*, 1993:55) but that it is important that both are achieved. New knowledge begins with the individual but integrating this knowledge into the organisational fabric is dependent on both the individual as well as the environment (Dunphy *et al.,* Marsick & Watkins, 2003:135-6; 1997:235; West, 1994:33). West (1994:32) proposes that:

> Until such time as individuals embed their discoveries, challenges and results of their enquiries into the organizational memory which encodes the theory-in-use, their work as learning agents is incomplete. This, however, implies that existing organizational systems, structures and cultures are receptive to fundamental challenges to established norms and procedures in order to facilitate learning and for it to be of benefit. On the basis that such elements are complex and highly intertwined, creating a climate in which a learning organization can thrive may be a monumental task.

The concept that each learner becomes a *knowledge catalyst*, carrying new learning into the workplace and spreading it into networks, is proposed by Hanna and Lester (2009:35). The 'semi-autonomous knowledge network clusters' then diffuse shared or compatible mental models across the organisation's systems of networks.

Whilst this may indeed be the way for highly directed learning to take place, the mechanisms for the exchange of tacit knowledge is less clear. Learners need to transition from being passive learners to lifelong, self-directed learners (Barley, 1998:15; Fulmer & Gibbs, 1998:177; Meister, 1998:34).

11.6.2 Benefits to workplace development

Benefits for the individuals include development of career directions (Wheeler, 2005:10-11), conceptual knowledge and critical skills related to the work environment (Barley, 1998:15), and professional development (Andresen & Lichtenberger, 2007:115).

11.6.3 Blocks to learning

Negative aspects to learning in the workplace are numerous and often more prevalent than anticipated. Learning can be uncomfortable and even threatening, particularly if the work environment is unforgiving (Berson, Nemanich, Waldman, Galvin & Keller, 2006:590; Rademakers, 2005:135). At the extreme, the concept of brainwashing or coercive persuasion is proposed by Schein, with the caution that it is not uncommon in modern corporates (Schein, 1999:177). Where learners are pressured into learning either to retain their positions, or as the prerequisite to promotion, these conditions are the precursors to coercive persuasion.

The Academy works closely with management and provides guidance on selection for programmes to ensure that learners are enthusiastic about the proposed learning intervention. Feedback is also pursued, both formal and informal, along with debriefings on programmes when they are first launched. Learning needs to be aspirational and inspirational and the learner needs to see the benefit to their own personal growth as well as recognition from the organisation. Graduations and project presentations are well attended by senior management, and these provide initial steps towards recognition. Action-learning processes also ensure that learning is profiled within the work environment.

An essential benefit provided by the Academy is the consistent processes which are followed, for example, the implementation of mentoring programmes becomes more sustainable because they are integrated into other longer learning programmes where learners need support. Learners identify mentors who are then expected to attend a mentoring programme. Over a period of time the web of integrated learning begins to have an impact on the learning culture of the organisation.

11.7 Human resource management as a stakeholder

The next element in the framework is 'HR' who delegate to learning and development officers. HR is guided and instructed by the managing director of the

business unit who expects knowledge, proficiency and implementation of learning to be conducted by the HR department.

The function of HR at the business unit plays a significant and influential role in establishing a learning environment. They also function as the 'gatekeeper' with regard to the access and influence that the Academy has with management and with learners.

Significant gaps in literature were discovered in this aspect of corporate university implementation. Apart from the general agreement that the learning and development function falls within the HR domain there was little specific literature around the role it plays in conjunction with a corporate academy.

Findings from the case study noted that a considerable role was played by HR and that it had the power to influence the implementation of learning in the work environment both positively and negatively.

A close relationship needs to be established by the corporate university with the HR fraternity – both collectively and individually. The Academy worked hard at this relationship to gain traction and establish legitimacy, as well as also ensuring that direct communication with the MD was in place.

It is important for L&D and the HR manager to form a team that are informed, professional and supportive of learning as they are lubricants to the achievement of a supportive learning environment at business unit level.

11.8 Learning and development officers as stakeholders

The next element in the framework is 'learning and development officers' that partner with the Academy and work collaboratively with line managers to achieve learning outcomes and to provide support to individual learners.

The new role for the L&D professional must begin with an understanding of the business model, or the way that the organisation builds value; like it or not, we must all become economists. Learning and development is no longer a 'trainer-centric activity'; it is no longer centred on what happened in the training room and on the skills required to make this an enjoyable and effective experience for the learner. It is about developing, through sustained activity that takes place in a variety of contexts and involves a range of people with different roles, the individual knowledge and skills that deliver better value products to the ultimate consumer or clients. In some senses this was always the case: the fundamental challenge is no different; however, the demands of the 'new economy' with its aware consumers, delivery through technology and global competition have made it much more intense.

Sloman (2010:2)

Sloman (2010:2) highlights the importance of comprehensive business know-how as an underlying fundamental for the role of a learning and development professional. The L&D person needs to understand the advantages and limitations of each of the various interventions or processes and should have the competence to guide implementation of initiatives in a manner that will have the required impact (Sloman, 2010:8). Sloman (2010:10-11) further suggests that the purpose of the role is to build organisational benefits through driving competence in being 'service-led' and 'knowledge-driven'. He suggests that the two pre-eminent challenges are firstly, aligning the learning with business objectives, and secondly, assessing and reporting on the value of the learning. Both these roles are core to the role of the learning and development professional.

The role of the L&D person in Group Five is fundamental to rolling out learning at a BU and site level, and to achieve this, the individual needs to have a comprehensive knowledge of both the higher-level business model as well as a basic knowledge of construction skills. This provides the basis for the engagement with line managers (usually site based) as well as with more senior managers. The Academy partners closely with the L&D people both through the L&D Forum as well as on an individual basis to grow their knowledge and understanding of the business aspects as well as of current developments in learning and development.

Sloman (2010:12) does note one final hurdle – that of ensuring a good understanding of what matters to recipients. If the value of the learning does not

meet the expectations of the learner, or what they perceive their need to be, then there will be difficulties in winning commitment to future learning.

11.9 Line managers as stakeholders

The next element in the framework is the 'line manager' who creates a learning-friendly environment for the individual as recipient and beneficiary.

> [W]e propose that leaders focus less on *what* their organizations should learn, but rather on *how* to set the conditions for collectives to effectively learn and share knowledge.
>
> Hannah & Lester (2009:35)

The role of the line manager in particular is important to creating a learning environment as proposed by Hannah and Lester (2009). Managers need to build learning capability which is not an academic exercise but rather one of focused management actions and accountabilities (Ulrich *et al.*, 1993:58). To create the right environment, managers themselves must be prepared to learn but this challenges traditional norms according to which leaders are in control and need to have the solutions to problems (West, 1994:35).

The culture of Group Five is very outcomes driven and deadlines are critical. The line manager needs to work within these parameters and 'create space' for learning to take place. This is not only the time out to attend classes but also the opportunities to experiment and take on additional roles and responsibilities in the workplace. The fact that well over 15 000 learning interventions take place annually in the Group is an indication that managers are indeed working to create conditions for learning.

11.9.1   Limits to learning

Limits to learning are largely based on learners' fear of exposing their inabilities and vulnerabilities, and this fear may be manifest in resentment, stress and cognitive dissonance (West, 1994:34). Managers need to show and mobilise a commitment to change through consistent supportive practices (Marquardt, 1996:106-7; Sloman,

2010:15; West, 1994:34). Where possible, the Academy commences learning initiatives from a senior level and then cascades them downwards. Comprehensive descriptions of learning programmes and interventions are available on the in-house intranet, and Academy members are also available for consultation should a better understanding of learning outcomes and curriculum be required. This detail in some measure deals with assuaging manager vulnerabilities and uncertainties.

11.10 Organisational culture as the normative domain

The last theme in the framework is 'culture as the normative domain' which is driven by a critical mass of individual learners. Improving organisational culture in turn raises the level of expectation of leadership to exert further influence in creating and sustaining a learning organisation.

> As we have said, in most organizations these operating principles are subtle and not articulated. Yet if you were to try to put together a corporate university that goes significantly counter to one of these unwritten assumptions, your chances of success are going to be limited. Like an architect of a house, the architect of the corporate university has to understand the principles and opinions of the stakeholders. .... You have to understand the context that the university will operate in and have a sense for what the stakeholders want and what will be credible to everyone.
>
> Wheeler (2005:37)

11.10.1 Organisational culture consists of bundles of shared norms

Corporate culture and climate differ from organisation to organisation, and implementation of a corporate university into the organisation needs to take cognisance of the culture and norms (Barley, 1998:20). Stirzaker *et al.* (2011) explain that culture consists of bundles of shared norms, which are behaviours that are common to a group, and, in addition, it is these norms that provide a sense of cohesion and protection against undesirable change. Dealtry, (2001a:216) advises that a culture of ownership of the corporate university needs to be promoted to make certain that it becomes a "shared positive collegiate dynamic in the psyche of the organisation" rather than a menu of programmes or just another department. Dealtry (2001a:216) further expands on this by stating that it is important to ensure that all

levels in the organisation internalise cultures that place significant value on new learning and knowledge creation – with the aim to increase organisational capacity and so increase competitive advantage.

The starting point, however, for the process of implementing a corporate university needs to be in understanding the context and culture of the organisation – as cautioned by Wheeler in the extract above (see 11.10). In the case study, senior management indicated that they were aware that buy-in would be 'a long hard road' but that the larger organisation would respond to growing Academy credibility and that this would result in accelerated buy-in.

11.10.2 Organisational values need to be supportive of learning

A successful corporate learning culture has a system of values that is supportive of learning, according to Marquardt (1996:70), and in turn the learning programmes of the corporate university can indirectly communicate the organisational values and beliefs through learning programmes that integrate a holistic understanding of the organisation (Andresen & Lichtenberger, 2007:114-5).

The culture of an organisation is visible through symbols, rituals, ideology, 'heroes', and values, and how learning occurs is determined by this culture (Marquardt, 1996:69). If the culture of an organisation is one of 'non-learning', then this will be symptomised by visible signs of fear, lack of information sharing, apprehensiveness towards taking risks, and a high need to maintain the status quo (Marquardt, 1996:69). By contrast, a learning environment is characterised by openness, an ability to challenge operating assumptions, experimentation, and structures and processes which encourage participation (Altman & Iles, 1998:47; West, 1994:36).

The selection criteria for programmes at the Academy include the need for manager support, and in some instances managers need to write a motivation for learner attendance. In addition to this, the recognition and the support from senior leadership are visibly indicated through their attendance of learning interventions and their input as guest speakers or panel members. Managing directors, HR directors and other senior leadership are regular attendees of learning events. The Academy

then also makes sure that this attendance and contribution is well advertised in Academy newsletters, the inter-company magazine and in reports.

11.10.3 Creating the right conditions for learning

A good understanding of the organisational 'sociology' is important to creating a learning culture (Altman & Iles, 1998:47), since learning involves risk. Creating and maintaining an environment conducive to learning requires commitment from management and the ability to mobilise commitment in others (West, 1994:37), and this needs to take a top-down approach so that the conditions are in place to maximise the emergence of knowledge creation (Hannah & Lester, 2009:35). Confusion or doubt in leadership support creates an unstable environment, and where positional power is used as a weapon, learning cannot succeed (Marquardt, 1996:70; West, 1994:37). Culture embodies an accumulation of prior learning based on earlier experiences which, if negative, can constrain and bias individual capacity to perceive or understand the vision or need for change (Denison, 1990). Grimbeek (2006:27) provides the insight that the normative view presumes that learning occurs within certain circumstances and that it is not random or by chance but that it is the role of management to ensure that conditions are in place for learning to occur.

11.10.4 Recognising the importance of people

Wheeler (2005:37) shares the insight that the corporate university makes a statement to people externally and internally about the whole company. It emphasises the value placed on employees. As noted in the case study, a healthier culture also develops, since increased competence and professionalism provide the manager with the confidence to develop subordinates, thereby expanding the circle of positive learning attitudes.

This has relevance for attracting and retaining talent, as well as for impacting on the health and well-being of the corporate culture (Gould, 2005:518). An organisation that is constantly learning has implications for investors and competitors.

11.11 Implications of the framework themes for organisational behaviour

Each one of the themes that comprise the framework is separately relevant to both organisational learning and organisational behaviour that support learning.

It is, however, from a holistic perspective, through the integration of themes that the magic of organisational learning happens. Brief and Weiss (2002:280) state that organisational behaviour is concerned with the *influence* of organisations on people, and people on work organisations. This is reflected in how organisations learn. Learning happens at an individual level, and through critical mass this has an impact on the culture and on the leadership of the organisation. Similarly, the leadership and the culture can impact on individuals. This can have either positive or negative connotations. Top-down autocratic culture can stifle learning, while bottom-up pressure can result in innovation and growth.

In the middle – between the individual and the organisation – that is, at the group level, there are line managers, HR managers, L&D officers and the Academy. As reflected in this study, all these 'groups' play a role in facilitating learning. Without the active support of these constituents, real learning that supports strategy is unlikely to take place.

11.12 Conclusion to this chapter

This study commenced with the intention of examining the role of organisational behaviour in establishing a corporate university in a large corporate in the construction industry. As a single case study, it is readily acknowledged that these findings are not generalisable, particularly since the study took a 'deep slice' perspective. Corporate universities have become increasingly popular, but few studies examine the actual set-up and the early years in detail, and even fewer focus on the behaviours required. The unique opportunity offered through my position of

being employed to set up an academy from scratch is not one that presents itself too often.

In this chapter, the role of organisational behavior in establishing an academy as a corporate university was discussed with the aid of an integrated framework developed during the research that highlighted multiple elements: context as a catalyst prompting a structured approach to learning and development; leadership as a critical role player in creating and sustaining a learning organisation; the academy as having a key role in driving learning in the organisation; the individual as a recipient and beneficiary; key stakeholders and role players as having a part in the implementation of learning (human resources, learning and development, and line managers); and culture as the normative domain. The chapter concluded with a view of these themes very specifically at the different levels in organisational behaviour (individual, group and organisational).

The next chapter looks at conclusions, propositions and areas for further research. The set of propositions offered emerged from this research study and form the basis for suggestions for further research.

12 CONCLUSIONS

12.1 Introduction

For organisations to survive and thrive in a changing world they need to be able to learn. *Creating a culture of learning* can be achieved through the support of a corporate university which in turn is dependent on not only the right process steps but also the right behaviours from a number of players. As noted in Chapter 1 (Section 1.4) the right process steps provide the skeleton while the understanding of deeper level behaviours, roles, attitudes, feelings, perceptions and relationships is the 'soft tissue', 'muscle' and 'vital organs' which give life to and sustain the corporate university. The significance of this study then lies in providing an organisational behaviour perspective to the costly venture of establishing a corporate university within an organisation.

The thick descriptions provided in the case study offer a rich source of evidence for the establishment and growth of the Academy. The "Reflexivity points" and Chapter 13 provide the overt insights of the researcher acting as Head of Academy on the journey undertaken over the five-year period, from inception to successful establishment of the corporate university.

The contribution that the research provides is a framework which clearly delineates the key role players and the types of behaviours, attitudes and relationships that can positively influence the creation of a culture of learning in an organisation. The perspective is clearly one seen through an organisational behaviour lens at all three levels: individual, group and organisational.

The purpose then of this study, as outlined in Chapter 1, was to research the role of organisational behaviour in the establishment of a corporate academy within a large construction organisation based in South Africa. This final chapter discusses overall conclusions through the provision of a set of propositions that leads on to areas for further research; an overview of the contribution to the body of knowledge; and the review of limitations that inform the research. The chapter concludes with some final reflections.

12.2 Propositions and suggestions for further research

Organisational behaviour as a field of study was used as a basis to understand and analyse the related behaviours (at all three levels, namely organisational, group and individual) and to understand their impact on the establishment of the academy within the organisation. Data was gathered over a five-year period from archival documents and records and from interviews conducted across the construction arm of the business, comprising three different business units. The managing directors, the human resources managers, and the learning and development officers from each business unit were interviewed to gain an understanding of their views based on a set of semi-structured questions. In addition, senior executives responsible for the overall management and direction of the Group were interviewed, including the CEO who was closely involved in the initial motivation for the Academy. And finally, a selection of learner and line manager video interviews were reviewed to collect data from these two perspectives.

Interviews were analysed along with data collected from archival documents, such as minutes, board reports and annual reports. The outcome was a framework (Figure 18: OB levels in web of relationships – see p. 101) which integrated the three organisational behaviour levels into the elements that were surfaced to capture the themes that evolved and played a role in the establishment of the Academy from inception through five years of growth.

Some propositions are offered to encapsulate the learning derived and which provide a concise contribution to the body of knowledge relating to the role of organisational behaviour in achieving a learning culture through the establishment of a corporate university in a large organisation.

High-level propositions emerging from the research conducted include:

1. Behaviour at individual, group and organisational level has a role to play in the successful implementation of a corporate university.

2. The external environment or context (meso level) of an organisation directly influences leadership thinking regarding the need for organisations to learn in order to remain competitive.

3. Each corporate university is unique as it is based on the particular organisational context, organisational structure, culture, challenges and leadership vision for the future.

4. Organisational leaders are the most critical role players as they provide the direction, support and resources to the Academy.

5. The corporate university, as an umbrella entity, has a key role to play in driving organisational learning aligned to strategy.

6. An academy team comprised of highly competent and influential individuals that are able to win the respect of business leaders is critical to success.

7. Individual learning needs to be integrated into the organisational fabric to support the overall organisational strategy and achieving competitive advantage.

8. Human Resource Management functions as the gatekeeper with regard to the flow of learning in the business.

9. A management team consisting of L&D and HR officers, who are informed, professional and supportive of learning, are lubricants to the achievement of a supportive learning culture at business unit level.

10. The line manager creates and enables the learning environment microcosm.

11. Organisational values need to be supportive of learning.

12. A corporate university serves the strategic needs of the organisation more effectively if there is a close structural link to the CEO.

The study comprised a single case which is context bound and within a particular sector. The field of organisational behaviour linked to organisational learning and

corporate universities offers a valuable contribution to organisations seeking to create a learning culture. Additional studies in this area would provide guidance for good practice and enhance the chances of success.

12.3 Contribution and significance of the research

The significance of the study lies in achieving a clearer understanding of the role of organisational behaviour in the establishment of a corporate university within a unique South African context. The contribution to the body of knowledge lies on two levels, namely theoretical and practical.

12.3.1 Theoretical contribution

Mapping the outputs of this research study on the model of Colquitt Zapata-Phelan (2007:1283) indicates that it is largely theory-building, since little literature exists on the behavioural aspects in the building of a corporate university. The contribution made by this research to the theoretical body of knowledge lies in the theory built linking corporate universities, organisational learning and learning culture to organisational behaviour.

From a holistic perspective, gaining an understanding of the manner in which the *environment* influenced the behaviours of role players leading up to and overlapping with the establishment of the Academy has relevance for action by organisations. Times of great change and rapid transitions require organisations to be nimble and learn fast. Having an in-house umbrella capacity to manage and monitor the learning will result in more coherent, focused and sustainable change.

Setting up any entity requires careful planning and management of resources, without much leeway for failure as a great deal is invested. Research literature on corporate university is preoccupied with identifying process steps and principles as exemplified in Meister (1998), Grenzer (2006), and Wheeler (2005). Whilst their research is very helpful, there is a gap with respect to the types of behaviour

required at all three organisational behaviour levels. It is in this area that this research fills a significant gap in existing literature.

Organisations are pressured by challenges of globalisation, changes in technology, high people mobility and extensive informal communication networks. Aligning strategy and business goals to organisational capacity needs to be a dynamic, living process, and the support provided by a corporate university augments the depth at which this can be accomplished.

The dimension of a sustainable learning culture that becomes the fundamental corporate culture, encompasses diverse local cultures and crosses a spectrum of individual growth aspirations. Leadership at the organisational level of engagement needs to foster this culture through promoting the development of people through the provision of visible support to learning, as well as of the resources required.

From a group level perspective, a great deal emerged regarding the behaviours of the Academy, and these included a team that engaged stakeholders, put in place the sustainable approaches and systems, and communicated effectively. Delivery needs to support organisational strategy by ensuring that skills and competencies are developed comprehensively and timeously.

In addition, the behaviour at this level is contributed to by HR, L&D and line managers, who need to: display role model leadership; provide an environment that supports learning; provide learning opportunities; be open in communication; and be committed to people development.

Behaviour at an individual level includes the ability to learn quickly, having a lifelong learning attitude, having self-insight and perception, personal flexibility and adaptability and the willingness to make a contribution to the organisation.

12.3.2 Contributions to management practice

The contribution of this study to management practice lies in an understanding of the importance of organisational behaviour as a consideration before investing money and effort into establishing a corporate university in the organisation.

The complexity of the 'Web of Relationships' as indicated in Figure 17 on page 99 is highlighted through the diagrammatic representation of the key areas to take cognisance of. This framework provides a ready reference, and the diagram provides easy insight as the relationships are surfaced clearly between each theme. The diagram is a map to navigate behavioural considerations, and due to the interconnectedness of each theme, defaulting in one area will endanger success in all areas. For example, if the line manager does not create a supportive learning environment microcosm, it will have direct implications for the implementation of learning that results in a sustainable change of behaviour. Similarly, an HR manager who is not supportive of the corporate university, can effectively influence the business negatively in spite of every effort from senior leadership or the corporate university.

12.4 Limitations that inform the research

Limitations impacting on the research are diverse and include: the researcher's position as a complete member researcher; the single case study design and the resultant impact on the generalisability of the findings; links to the context; the extensive quantity of data collected; and finally the duration of the study. These limitations are discussed in more detail below.

As a *complete member researcher*, my position as insider is acknowledged as being limited by subjectivity notwithstanding attempts at reflexivity. In mitigation of this, I utilised data collected from interviews and archival documents as a basis for the framework which emerged from the analysis phase of the research. Findings were subsequently shared with the organisation as part of the feedback process. Qualitative researchers particularly emphasise the socially constructed nature of reality, the relationship between the researcher and the research area, and the situational constraints that shape the inquiry.

An additional perspective on my position as complete member researcher, relates to my 'group' membership. Matzler *et al.* (2010:5) note that prejudice is also closely

related to how in-group and out-group members explain or rationalize each other's behaviour. These explanations are also referred to as "*causal attributions*" in psychological terms and are both a symptom and source of prejudice (Matzler *et al.* 2010:5). Where studies rely solely on interviews and researcher interpretation, there is a tendency to attribute success or behaviours selectively such as to self or the in-group.

The research data is indeed based on interviews, data collected within the organisation as well as the researcher's observation and personal interpretations. The risk exists that there is bias or causal attribution. Recommendations thus include that future research should include a wider collection of data such as a quantitative study including using data gathered from, for example, an extensive survey.

A second limitation is *the single case study design* followed in the research, which impacts on the generalisability of the findings. According to Yin (2009:47-48), theoretical sampling of single cases is straightforward since they are selected because they are unusually revelatory, extreme exemplars, or opportunities for unique or unusual research access. Thus this limitation can also be considered a benefit as the single case design ensures a focus on a depth of data in a unique case rather than on broad coverage. The data collected comprises thick descriptions, and a number of sources were consulted in confirmation or triangulation of evidence. Mindfulness of the single-case constraint resulted in a rigorously constructed framework (Figure 17: Complex web of relationships) and in a prudent presentation of propositions rather than to risk the title of 'data praxeologist' (Martin, 2004:414). Rigour and parsimony were a key consideration for this study. Eisenhardt and Graebner (2007:25) note: "The result is fresh theory that bridges well from rich qualitative evidence to mainstream deductive research. This is the hallmark of building from case studies".

Another aspect of generalisability of findings is the caveat that the resultant theory is *contextually bound* – hence mention must be made of the boundaries of relevance (Bacharach, 1989:496; Miles & Huberman, 1984:25). In the study, the boundaries included: the construction industry; the South African context; and the particular

organisation. Future case studies might consider a multiple case study design which may help to reveal differences in the unique drivers or reasons for corporate universities. This may reveal different emphases in behaviours and roles.

In addition, from a theoretical perspective, the *propositions were not tested* in an additional case or company. In formulating and conceptualising the propositions, it is possible that other researchers could take a different view or make a different interpretation, but these propositions are intended to provide the basis for future studies where they can be empirically tested.

A third limitation (which links to the point above that the theory is contextually bound) relates to the meso level that pertains to the *de facto link to the context* in which the corporate academy was established. McMillan and Schumacher (2001:16) note that human actions are strongly influenced by the settings in which they occur.

Yin (2009:14-15) notes other possible shortcomings of case study research which include: *lack of rigour, duration and 'massive, unreadable accounts'*. This case study was based on a rare opportunity to examine the establishment of a corporate university in the South African context – the first in the construction industry – and although corporate universities are becoming more common in South Africa, they have not been researched extensively. Whilst the collection of data did result in a considerable expanse of data, the final case study presented followed a structured framework which provided the coherence required to support sense-making.   In counterpoint, the advantage of using qualitative methods is that the rich, detailed data that preserves participant perspectives and provides multiple contributions for understanding the phenomenon are being researched.

From a theoretical perspective a limitation was experienced with respect to the *level of detail* that could be included on all the themes of the framework. For example, whilst the field of organisational is inherently multilevel, the study outcomes focused more on an organisational level (for example organisational learning and organisational culture) rather than the individual and group level (such as team learning and individual learning theory). Furthermore while the theme of leadership was dealt with in both literature as well as a 'theme', the vast scope of topic meant

that a selective approach was required and this was done through theory being summarised into table format and only theory deemed critically relevant to the study by the researcher being included.

A final limitation was the *scope of five years*, which is an inconsequential period of time, however, since the study focused more specifically on the establishment and implementation of a corporate university from an organisational behaviour perspective this was considered an acceptable constraint.

12.5 Ethics as an aspect of research

12.5.1 Ethics relating to corporate universities

The findings of this research need to be considered from an ethical perspective. First and foremost, is the solution with respect to the framework developed providing an ethical solution. A multiple perspective view must be used when considering ethical implications.

A question that all corporates with institutions of learning within must consider is whether the corporate university is an appropriate vehicle for reaching the employed population. Individuals that are employed in these corporates may feel coerced by the requirement to continue learning, or they may feel that their promotional opportunities are at risk, or they may even feel that they are jeopardising their future in the organisation if they do not participate. This perception needs to be managed wisely as fear is a strong inhibitor in the learning process.

Funding and access to learning is entirely controlled by the organisation. This may result in some learners being disadvantaged based on the particular perspectives or beliefs held by the organisation. For employees wanting to take advantage of learning offered, there could be the feeling of being excluded or overlooked.

An allied possibility is where corporates align the learning to corporate needs only and disregard employee requirements for self-development and personal benefit.

This could be driven by the real corporate fear that advancing learning for an individual increases their attractiveness to other organisations, resulting in money being spent in vain.

12.6 Final reflections

Organisations in the world today see leadership development as a routine, necessary investment and expect a concrete return. Benefits derive to both the individual as well as to the organisation in fast tracking change and addressing company-specific issues that impact on bottom-line results.

Learning solutions need to be accessible, affordable and fit-for-purpose. The corporate university is an umbrella entity that can provide company-specific, customised programmes that can be delivered across a variety of mediums, both formally and informally.

Care needs to be taken that the apparent solution to every behavioural problem is not seen as being a 'training programme'. Corporate universities are primarily a support initiative for organisational strategy and need to be future focused.

It remains only to say that, organisations embarking on establishing a corporate academy must take care not to overlook the role of organisational behaviour.

13   EPILOGUE – MAY 2013

13.1 Introduction

The setting up of the Group Five Academy fell under my leadership from inception through to complete establishment. Whilst receiving a great deal of encouragement from my doctoral research supervisors during the write-up stage of this dissertation to 'make my presence known' throughout the preceding 12 chapters, I avoided doing so as I felt that the evidence gathered needed to speak for itself independently of my overt contribution. I also truly believe that the Academy achieved its success through the efforts of the Academy team as a whole.

Two conclusions were, however, unavoidable: firstly that the evidence, as presented in the case study chapters, was selectively selected, interpreted and presented, much along the lines of the syntagmatic and paradigmatic semiotic structuring. This meant that I, or indeed any researcher, is very much a 'presence' in the entire research process, not only at the reporting stage. To deny or to try to deflect this responsibility would result in not being true to the academic researcher's goal. The second conclusion reached was that whilst the success was achieved by the team, they were all under my guidance, as Head of the Academy.

Tietze (2012:53) notes that whilst there is a body of knowledge regarding authoethnographic processes and writing self into the research text, relatively little literature exists to provide guidance to those researchers who are conducting research in the context of their employing organisation. She further adds that awareness of the researcher's role is pivotal to understanding how this involvement

shapes the generation of knowledge (Tietze, 2012:54). This includes understanding the role between the researcher and those being researched, understanding the pertinent boundaries, as well as the spatial and temporal confines of the research project. For the researcher, Tietze (2012:54) acknowledges that there are challenges such as role ambiguity and inner conflicts during the research process. My role within the organisation provided the opportunity to explore the domains of experience, formal and informal, emotional and cultural. These opportunities, and the depth to which they were explored, more than likely would not have been possible to an outsider or an observer (Brannan & Oultram, 2012:310).

This epilogue then is a reflection back on what it was like being an insider organisational behaviour researcher (Anderson, 2006:375). Discussed in this chapter are positionality discomfort, my background, my role, my views, and building a credible team. The chapter concludes with a 'mini' personal OB view and some final thoughts.

13.2 Schizophrenic positionality

I accepted the position at Group Five partly based on the realisation that this was exactly the direction I wanted to take for my doctoral research. My Master's dissertation (Executive MBA in 2003 at UCT) was on the topic of learning organisations (Title: *The odyssey toward a learning organisation: how organisations learn*). Being given the opportunity to build a corporate university from scratch was very enticing. At my very first interview I disclosed my interest in pursuing my academic studies, and this was acknowledged as being not only possible but a benefit for the organisation.

The question could be asked – did I do things the way I did because I knew that I would be using that which I had structured and put in place as a basis of my studies? Did I apply the rigour and stringent measures in terms of meetings, minutes and processes followed because of my studies? Would I do things differently if I started a similar venture tomorrow, since my studies have now come to an end?

Since in reality there is probably no way to answer these questions completely as they are very complex and touch on consciousness at a deep level, it is perhaps a little easier to jump to the end picture and say that: the Group Five Academy was an unmitigated success, and benefits were derived to the organisation directly, and it provided me with a credible and fairly unique research topic.

13.3 My background

A brief synopsis of my CV is provided at the end of Chapter 4 in the "Reflexivity points". It indicates that I have wide-ranging experience engaging at a high level with big corporates in the design and development of learning programmes for leadership and management programmes, and also at times in areas of functional expertise. My exposure to adult learning started in 1996, prior to which I had been involved in the hospitality industry from 1979. The common thread through all my work experience was a deep interest in people and their behaviour.

My biggest leap in personal development took place during my MBA studies. I learned formal concepts and philosophies, foremost amongst which was systems thinking which complimented and provided a framework for my firm belief in action learning. My studies gave me the confidence to believe in my own opinions and act on them.

People development is a very real passion for me – both at a granular individual level as well as at the organisational level in terms of the longer-term shifts that take place over a period of years. I enjoy the challenge of getting to grips with the levels of complexity involved with understanding how best to win through with a long-term solution to difficult business challenges. This is perhaps akin to a chess game of jumping through the squares in a non-linear manner, achieving the micro small wins which eventually end up coalescing into a bigger, harmonised picture. There is never a 'check-mate' or 'game-over' status in learning – it is always driven by new pressures and challenges presented by the external environment. At this point it is

also not just a case of 'continual improvement'; sometimes frame-breaking re-thinking needs to take place to come up with the right learning solutions. (And sometimes 'frame-breaking' wisdom is required to accept that learning solutions are indeed not the solution in some instances.)

13.4 My role as initiator and key protagonist

I remember the first few months as being very difficult. Because learning and development is very different from what engineers do, I think at first the business did not know what to make of me and my role. I was determined to succeed but did not have a clear idea of how I would achieve this.

Due to a lot of changes happening internally, I did not have the support/engagement from leadership that I needed. Being a logical and pragmatic person, I went ahead with what I thought were good decisions, and sought ratification at key points. This worked sufficiently well to allow me to forge ahead.

Today, I have a good network in the business, and am in awe of the level of support and belief in learning that exists across wide swathes of the organisation. I do not believe that I or the Academy created this belief, but that we provided a 'mechanism' which allowed it to grow.

13.5 Views on my role from a business leader perspective

During the course of conducting the interviews, there were a few challenges due to the relationships which pre-existed before the interviews. The first challenge was keeping the interview on track without digressing to discussing issues in the workplace where the Academy could possibly contribute. Since this was the usual context for engagement, it was easy to lapse into this discussion. Secondly, there was an unanticipated response from interviewees to include my role as a critical success factor. I did not solicit this response in any way and I felt awkward about it,

and thus did not want to include it in the research report. It is captured in this section at the prompting of my research supervisors who feel that it provides a more comprehensive perspective on the evolution and success of the Academy.

The quotes from interviewees are inserted in the blocked-off boxes as indicated in the example below.

Interview reflection from a senior manager on my role:

- scope of my role

Don't underestimate your own role. It [original intentions and thinking by senior management] was embryonic management and development thinking. You have taken it to the full Academy, so don't underestimate that.

13.5.1 Driving force

I do believe that the Academy, as with any entity, needs a person who will oversee and create a forward momentum in order to make it happen. The extracts from interviews are self-explanatory as noted below.

Interview reflection from an HR director on my role:

- resilience and leadership

The other critical factor I think has been yourself. You have been exceptional as the leader of the Academy. That job could have broken many other people. … and to just have stayed that course and maintained your sense of enthusiasm and motivation was a critical, critical success factor for the Academy. ... But the Academy has been an out and out success under your leadership and a very deserved [CEO] Team of the Year Award.

Interview reflection from a senior director on my role:

- assertive determination motivated by passion and drive

This last quote raises the question of the extent to which a leader leaves a legacy, and whether this legacy is sustainable. I think parallels can be drawn with any organisation, large or small, but the influence of a leader's departure has an impact. Whilst this can be mitigated in the short term by having good systems and strong team members in place, succession planning is essential to ensure a smooth segue into a new era for the Academy.

13.5.2 Engaging consultative approach

There is a time and a place when the need arises to be very determined and assertive, but while depending on the circumstance, a more tempered approach should be the norm. My usual approach as experienced by a senior executive is described below.

Interview reflection from a senior executive on my role:

-    consultative, business partner role

> *I think there are individuals in the Academy that have also assisted in changing the culture. I think yourself – I think with the business units you have had more of an engaging consultative approach. I think the business appreciates that.*

Leading learning and development in an organisation of over 10 000 employees, working in more than a dozen countries at any one time, cannot be achieved by one person. The Academy team was recognised in interviews as being a team that delivers. Whilst the 'delivery team' actually encompasses the wider L&D officers as well, interview excerpts in this instance refer only to the Academy team as indicated in the section below.

13.6 Building my team

Any team needs committed, energetic, engaged and knowledgeable people who are responsible and accountable in order to succeed. This is the group of people that I envisaged when embarking on the recruitment of people with very good L&D expertise and experience. In many instances it took more than six months to find the right person. Not only experience and expertise were considered but also how the people would fit into the team ethos that I was hoping to create. I was incredibly fortunate to employ, as the second member to the Academy team, a person with the right spirit as well as with a full range of skills which complemented mine. The Academy became a 'we' rather than an 'I'. Where we could not find the perfect match of skills needed, we took on people, and 'inherited' people from the business, and then mentored and coached them until we raised levels of expertise. The 'we' then encompassed the full Academy team.

Building a team is difficult and takes time and patience. Sustaining a team becomes a daily balancing act – as managers the world over have experienced. I do think though that there is a subtle difference in an Academy team. Business expectations are that you set the standard as a team – the old sayings of 'charity begins at home' and 'the story of the cobbler's children' apply.

An Academy team needs people with a passion for people development. I do not think that it is possible to have a role in learning and development without having a passion for it.

13.6.1 Credibility of the team

From a more mundane perspective – each of the team members recruited needed excellent project management skills. These skills ensured good planning, rigorous implementation and comprehensive review mechanisms. This resulted in protecting the Academy's reputation and growing credibility.

Interview reflection from an Executive Committee member on the team role:

- entrenched in the organisation and creating a learning culture

I think the Academy has become entrenched in Group Five .... That's credit to you and the team, once you had got the credibility to deliver, you established a culture of learning that people buy into.

Interview reflection from an HR director on the team role:

- competent and influential team members

I think the resources at the Academy [are] highly competent and influential. I think through just pure hard work and delivery to the business units, they have earned their stripes, created a need to use [the Academy] and therefore, because of that they have got the agenda to say, "Okay here we are, and we can give you more". And the guys are susceptible to that.

Interview reflection from an MD on the team role:

- Academy strength as a team

So I will crit [criticise] many things within Group Five but I will not crit your Academy. I think you have got a great bunch of people. Look, I don't know all of your employees, but I know a fair amount of those. And the ones I've had interaction with are superb. All of them. They all have different strengths and weaknesses but are superb.

I tried to create a learning environment at the Academy – where people were not afraid to try new things, but who at the same time took responsibility for their actions and decisions. In the same fashion the team was not afraid to tackle areas where we felt we had gaps. Criticism and feedback from learners and from the business were actively encouraged as it 'upped our game', and our quick response time on feedback meant that those contributing the initial feedback felt as though they were taken seriously – enhancing buy-in.

13.7 A personal 'mini' OB perspective

13.7.1 Individual level: my role as Academy leader

My role as a catalyst lies in being the interface between the business and the Academy. A high level of business know-how, awareness of the external business environment, and ability to network with business leaders are required. Much of this is communicated through my behaviours – which need to be consistent – and outputs need to be visibly shown over a period of time. Judgement is required with regard to understanding where the real problem lies and whether indeed it is a problem that can be solved through learning and people development. Being able to communicate this appropriately is a required competence.

13.7.2 Group level: creating the momentum through the Academy team

As an Academy team we are able to create the momentum for a sustainable learning environment. Often business units are able to implement one iteration of any initiative, but do not have the wherewithal to keep further programmes going and thus fail to create a baseline of behaviour or culture.

The Academy is able to plan for the required resources and able to get and keep things going. Our behaviour as a team directly influences the level of acceptance and inclusion into the business.

13.7.3 Organisational level: the prize

The ultimate prize is 'a learning organisation'. Any (positive) culture can take years to achieve but it can be destroyed in a much shorter period of time.

Whilst many of those interviewed ascribe the learning culture to the influence of the Academy, I believe that it is the leaders of the organisation who create a learning culture. From an MD level down to the line managers, it is their role to create the environment of learning.

The Academy plays a supportive role and takes on a lot of the initiative planning and workload but actual learning is driven at an individual level. In other words, the Academy looks at the bigger picture of organisational strategy and provides learning initiatives that support this strategy. We then communicate what these initiatives are, along with a 'ladder of learning' that the line manager can use as a 'curriculum' for personal development plans.

Over a period of time, a culture of learning is created at the micro level whilst outcomes at a macro level gain critical mass. In this way the Academy encourages the achievement of learning behaviours which lead to a learning culture. I think that we have come a considerable distance down the road of encouraging consistent learning behaviours, but the journey continues.

13.8 Afterword: final thoughts

Looking back through the years to 2006, I have been privileged to have been given the opportunities that I have, as well as the resources and degree of freedom to build the Academy. In reflection, it begs the question: in retrospect, would I have done things differently?

I think perhaps Heraclitus has the answer, paraphrased as; *you cannot step into the same river twice.*

The nation's economy and the quality of life of its citizens depend heavily on the supply and efficient operation of infrastructure. Yet the civil engineering industry faces unprecedented challenges in attracting, recruiting and retaining the staff needed to design, manage and deliver this infrastructure, without which poverty alleviation and ultimately its eradication, is not possible.

Lawless 2005:3

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APPENDIX A: SUPPLEMENTARY DOCUMENTATION

A:1 Main sources of archival information

Name of document/s	Period
Annual Reports	2002-2011
Academy Operations Meeting Minutes	2007-2011
Academy Steering Committee Meeting Minutes	2006-2011
L&D Forum Meeting Minutes	2007-2011
Academy Newsletters	2007-2011
Academy contribution to Board Report	2008-2011
Miscellaneous Documents	2006-2011

A:2 Main sources for interviews

Data collection tool	Who	Duration and sample size
Interviews: semi-structured, in-depth	Executive Committee of Group Five including CEO and CFO	one hour five people
Interviews: semi-structured, in-depth	Managing and contract directors of construction business units	one hour four people
Interviews: semi-structured, in-depth	HR Operations Director and HR directors of construction business units	one hour five people
Interviews (video): structured	Learners in construction business units	10-15 minutes 16 people
Interviews (video): structured	Line managers in construction business units	10-15 minutes 17 people
Interviews: semi-structured, in-depth	Academy Programme Manager and Group Skills Development Manager	one hour two people
Focus group: semi-structured, in-depth	Learning and development officers from construction business units	two hours three people

A:3 Source data availability*

Extracts from documents consulted during research are not included in the Appendices of this thesis due to space constraints but are available electronically as follows:

- Extracts from archival documents as detailed in the table "Main sources of archival information" above
- Annual reports which are available on the corporate website: www.groupfive.co.za
- Interview transcripts – modified to protect anonymity
- Researcher's memos

* Participants were assured of anonymity, thus any data that reveals identity remains with the researcher.

A:4 Source data access details

Supplementary documentation is available in an electronic format on a USB drive. Contact details can be found below:

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APPENDIX B: SEMI-STRUCTURED INTERVIEW QUESTIONS

All the interviews were based on the same or very similar questions. In some instances the focus of the question was adjusted. These minor adjustments are reflected below:

B1: CEO, CFO and Executive Committee interview questions

    1.1. Understanding the context of and initial concept for the Academy

When the concept of the Academy was first formed – what was the underlying rationale and motivation? How did the sector and economy at the time influence this decision?

    1.2. Establishing expectations

In the first year – did the Academy meet expectations? What were the organisational needs that were established at the outset – and were these met? Did the concept of the Academy evolve over the following two to three years? How? Were there any notable successes or disappointments from a corporate perspective?

    1.3. Establishing critical success factors

What do you think are the factors that influenced the success of the Academy in the early years – are these factors still the same? What role do you think leadership played/plays? What role do you think culture played/plays? Do you think the Academy has influenced the organisation's culture?
If you were to wind the clock back would you make any changes in how the Academy was set up and unfolded?

    1.4. Contributing to organisational strategy

What role do you think the Academy plays in contributing to the overall strategy of Group Five?

    1.5. Measuring success and identifying behavioural elements through a comparison

Do you think the impact of the Academy is greater in some business units than in others? If yes – could you indicate why you think this is the case? What aspects of leadership/culture/etc. are of particular significance? What changes could be made to increase the engagement of senior leadership?

    1.6. Focusing on the future

What role do you think the Academy should play in the future? Focus areas? Where are the current gaps? What are the gaps anticipated to be in the future?

B2: Managing Directors, Contract Director, HR Operations Director & HR Directors interview questions:

1.1. Understanding BU thinking regarding the context of and rationale for the CU

What do you think the reason is for having an academy within Group Five? Within the recent boom and bust cycle – do you think the Academy is more 'valid' in one or the other of the phases? Why?

1.2. Establishing expectations

Since the inception of the Academy – to date – how has the Academy engaged with needs within your BU? What were your initial expectations – and have these been met? Has your initial expectation and current understanding of the role of the Academy changed in any way? How and why?

1.3. Establishing critical success factors

What do you think are the factors that influenced the success of the Academy in the early years – are these factors still the same? What role do you think leadership played/plays? What role do you think culture played/plays? Do you think the Academy has influenced your BU culture?
If you were to wind the clock back would you make any changes in how the Academy interfaced with your BU?

1.4. Contributing to BU strategy

What role do you think the Academy plays in contributing to the overall strategy of your BU?

1.5. Measuring success and identifying behavioural elements through a comparison

Do you think the impact of the Academy is greater now than it was in the years past? If yes – could you indicate why you think this is the case?
Do you think the Academy plays a bigger role in some BUs than in others? Why do you think this is? What aspects of leadership/culture/etc. are of particular significance? What changes could be made to increase the engagement of senior BU leadership?

1.6. Focusing on the future

What role do you think the Academy should play in the future? Focus areas? Where are the current gaps? What are the gaps anticipated to be in the future?

B4: Learner video interview questions

These video interviews are conducted after each junior management programme and interviewees are selected randomly based on pragmatics such as access and availability.

The raw video data from the interviews is then edited and compiled into an end of programme "movie" which is shown to attendees to the programme graduation. Attendees include graduating students, spouses, Group Five line managers, senior managers and directors who are invited to the event.

This video material was reviewed as it provided a view of learner experiences on a learning programme that is hosted and co-ordinated by the Academy. The actual content and facilitation is conducted by an external service provider who has customised content for Group specific requirements.

Questions for the Learner:

(Questions are given to interviewees in advance and guidance is provided that answers need to be kept to approximately one minute.)

1. In what way do you think this programme has benefitted the Group?

2. How did this programme impact your department \ BU?

3. Has this programme changed your behaviour or has it changed your life in some way?

B5: Line Manager interview questions

These video interviews are conducted after each junior management programme and interviewees are selected randomly based on pragmatics such as access and availability.

The raw video data from the interviews is then edited and compiled into an end of programme "movie" which is shown to attendees to the programme graduation. Attendees include graduating students, spouses, Group Five line managers, senior managers and directors who are invited to the event.

This video material was reviewed as it provided a view *of line manager experiences of their subordinate being on a learning programme* that is hosted and co-ordinated by the Academy. The actual content and facilitation is conducted by an external service provider who has customised content for Group specific requirements.

On this programme, as with the majority of programmes (excluding workshops or conferences), line managers are expected to support and mentor learners to enable them to implement learning. Action learning requires avenues of implementation to embed learning for both the learner and the organisation. Mentoring is structured into the programme as a formal component and both mentors and mentees need to attend sessions that teach them the relevant skills.

Questions for Line Managers/Mentors:

(Questions are given to interviewees in advance and guidance is provided that answers need to be kept to approximately one minute.)

1. What were your initial expectations of the programme and have your

    expectations been met?

2. What value has this programme added to your BU?

B6: Academy Programme Manager and Group Skills Development Manager interview questions

    1.1. Understanding the context of and initial concept for the CU

When the concept of the Academy was first formed – what was the underlying rationale and motivation? How did the sector and economy at the time influence this decision?

    1.2. Establishing expectations

In the first year – do you think the Academy met expectations? What were the organisational needs that were established at the outset – and were these met? Did the concept of the Academy evolve over the following two to three years? How? Were there any notable successes or disappointments?

    1.3. Establishing critical success factors

What do you think are the factors that influenced the success of the Academy in the early years – are these factors still the same? What role do you think leadership played/plays? What role do you think culture played/plays? Do you think the Academy has influenced the organisation's culture?
If you were to wind the clock back would you make any changes in how the Academy was set up and unfolded?

    1.4. Contributing to organisational strategy

What role do you think the Academy plays in contributing to the overall strategy of Group Five?

    1.5. Measuring success and identifying behavioural elements through a comparison

Do you think the impact of the Academy is greater in some business units than in others? If yes – could you indicate why you think this is the case? What aspects of leadership/culture/etc. are of particular significance? What changes could be made to increase the engagement of senior leadership?

    1.6. Focusing on the future

What role do you think the Academy should play in the future? Focus areas? Where are the current gaps? What are the gaps anticipated to be in the future?

B7: Learning and Development officers focus group questions

1.1. Understanding BU thinking regarding the **context and rationale** for the corporate university

What do you think the reason is for having an academy within Group Five? Within the recent boom and bust cycle – do you think the Academy is more 'valid' in one or the other of the phases? Why?

1.2. Establishing **expectations**

Since the inception of the Academy – to date – how has the Academy engaged with both your needs and more broadly with needs within your BU? What were your initial expectations – and have these been met?

Has your initial expectation and current understanding of the role of the Academy changed in any way? How and why?

1.3. Establishing **critical success factors**

What do you think are the factors that influenced the success of the Academy in the early years – are these factors still the same?

What role do you think leadership played/plays?

What role do you think culture played/plays? Do you think the Academy has influenced your BU culture?

If we were to wind the clock back, do you think there are any changes to be made in how the Academy interfaced with your BU?

1.4. Contributing to BU strategy

What role do you think the Academy plays in contributing to the overall strategy of your BU?

1.5. Measuring success and identifying behavioural elements through a comparison

Do you think the impact of the Academy is greater now than it was in the years past? If yes – could you indicate why you think this is the case?

Do you think the Academy plays a bigger role in some BUs than in others? Why do you think this is? What aspects of leadership/culture/etc. are of particular significance?

What changes could be made to increase the engagement of senior BU leadership?

1.6. Focusing on the future

What role do you think the Academy should play in the future? Focus areas?

Where are the current gaps? What are the gaps anticipated to be in the future?

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B8: Example of an email sent requesting an interview:

From: Janet Brumme
Sent: 17 August 2011 12:18 PM
To: Peter Smith
Subject: "Interview" for studies

Hi Peter,
I am half way through studies in organisational behaviour – and the role played in establishing an academy. I am at the stage where I need to source information from key role players in the organisation.
I know your time is very precious – but would appreciate it if you could give me approximately 45 minutes. Timing – around early to mid-September if that suits you?
I can provide a broad outline of the questions should you wish – they are in 'informal, semi-structured' format, so have been pre-formulated but not cast in stone.
Please let me know!
Kind regards
Janet
Janet Brumme
Head of Academy
Group Five Corporate and Business Services (Pty) Ltd

Tel   +27 11 806 8387   Fax +27 11 806 8376
371 Rivonia Boulevard, Rivonia, Sandton, South Africa
Email jbrumme@g5.co.za

GROUP FIVE
structured ingenuity   www.groupfive.co.za

APPENDIX C: EXAMPLE OF CODING AND MEMOING OF DATA

Node Title	Quote or extract from document (verbatim)	Researcher Memo	Doc Title
Meet and greet	3. BU visits and preliminary TNAs	Early on in the establishment of the CU a process was starting in vising various BUs and gathering information on perceived training needs.	Steerco minutes - 18Aug06
Priority programmes	4. Priority Programmes Two immediate priority programmes have been identified…	To establish credibility it is useful to start with programmes that have direct functional benefit and are perceived as directly useful and impactful on business improvement. The notion of a "quick win".	Steerco minutes - 18Aug06
Senior management included from outset of PMD	Invite ML MU TW & RdT to start of day???	For the launch of the PMD - flagship leadership development programme with GIBS, senior management were invited to (and attended) the launch cocktail party. The impact of this was the realisation for the students that senior management supported the process and that they were thus motivated to achieve good results. For senior management - there was the awareness of who was on the programme and a process of getting to know the potential future leaders of the company.	Summarised Timetable PMD 2006-7 JB notes
Programme customisation where it counts	Wrap around blocks 7. Group Five customised modules (Steerco Minutes)	Engagement with the provider to ensure input of a very specific nature related to the Group's needs and material oriented to our specific needs. Wrap around blocks containing our own speakers - functional sessions introduced by our own internal SME - and projects (ALPs) were mentored through to implementation to ensure org benefit. In addition all faculty attended briefing sessions to ensure alignment and customisation to The Group Five Way.	Summarised Timetable PMD 2006-7 JB notes also in Steerco Minutes 18 Augu06 see also Steerco minutes 21Sep06 see also Steerco 24Nov06
Action learning	1. ALP projects - proposals have been handed in 1. Projects require concept acceptance by Group Five - to be done jointly by Steercom and by division impacted by the project. Divisional acceptance and resourcing to be managed by the various groups directly.	From the outset there was a focus on the link between learning and behaviour change. Action learning - in its true form - is practiced in all of the longer programmes. Projects must be implemented and critical feedback given on lessons learned.	Steerco 21Sept06
Action learning - business focus		Business input and support is requested from the outset - especially in key programmes.	Steerco 21Sept06

APPENDIX D: OVERVIEW OF RESEARCH POWERPOINT PRESENTATION

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Research outcome - summarised

- The anticipated outcome of the study is an organisational behaviour framework for the establishment of a corporate university.

Objectives of this study

- To develop an OB blueprint (organisational level) for a corporate university—from inception to fully fledged entity
- To determine key OB success factors arising from the exploratory blueprint and test these against literature
- To explain the role and importance of managing OB in the establishment of a corporate university
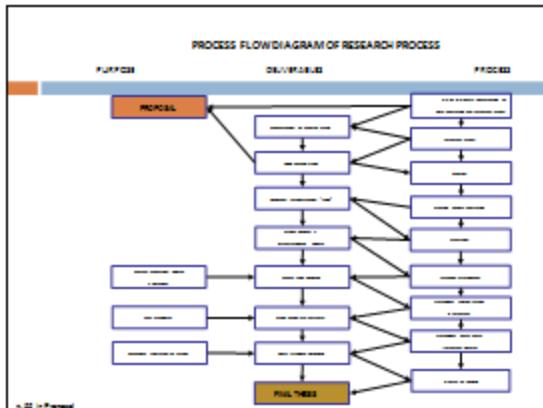
Scope of study

Assumptions

- corporate universities are premised on organisations who aspire to become learning organisations.
- fundamental link between corporate culture, organisational behaviour and corporate universities and that it is possible to better understand that link.
- based on the success of the corporate university that the model it is based on contributes to its success and therefore could contribute to informal theory.
- researcher has the expertise and insight to understand, explore and communicate the relationships that exist and can as objectively as possible reflect these formal in a final report.

Limitations

- A qualitative study looks at depth rather than breadth – and more particularly a case study contains a considerable amount of context rich data.
  - The focus of the study will be on one particular case – and this will impact on generalisability, however since the purpose is to construct informal theory rather than verify theory this could be considered an acceptable limitation.
- A further limitation is the scope of four years – which is an inconsequential period of time, however since the study focuses more specifically on the design, and establishment of a corporate university from an OB perspective this could be an acceptable constraint.
- The researcher as a key participant could be considered a limitation as what could be apparent to an external observer may be overlooked.

Methods

- Qualitative research – all variables not currently 'known'
- Grounded theory – appropriate for theory building
- Case study – suitable to discover dynamics of a particular instance

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Research Ethics

- Ethical principles will be adhered to in this study — including to gain informed consent, respect confidentiality and requests for anonymity and privacy as well as to be sensitive to concerns of participants. (McMillan and Schumacher, 2001:420-1)

Research Rigour

- Trustworthiness
  - A necessary feature of theory building is the ongoing comparison of the emergent concepts, or informal theory, and literature. A questioning process includes; what is this similar to, what does it contradict, and why? (Eisenhardt, 1989:545) A broad range of literature needs to be consulted concurrently with the theory building processes and assurance of research rigour in the form of trustworthiness must be evident in qualitative research
  - skills in managing formal and systematic methods of data collection and analysis to ensure the rigour of their work (Shah & Corley, 2006:1824; McMillan & Schumacher, 2001:411).
- The role of the researcher in this study

Project plan

Closure

- Questions?
- Comments?

- THANK YOU

APPENDIX E: ETHICAL APPROVAL

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FACULTY OF ECONOMIC AND MANAGEMENT SCIENCES

RESEARCH ETHICS COMMITTEE

Tel: +27 12 420-2306
E-mail: anske.grobler@up.ac.za

31 March 2011

Prof Y du Plessis
Department of Human Resource Management

Dear Professor du Plessis

Project:	*The role of organisational behaviour in establishing a corporate academy in the construction industry*
Researcher:	**JK Brumme**
Supervisor:	**Prof Y du Plessis**
Department:	**Human Resource Management**
Student No:	**26415080**

Thank you for the application you submitted to the Committee for Research Ethics, Faculty of Economic and Management Sciences.

I have pleasure in informing you that the Committee formally approved the above study on 30 March 2011.   The approval is subject to the candidate abiding by the principles and parameters set out in her application and research proposal in the actual execution of the research.

The Committee requests you to convey this approval to Ms Brumme.

We wish you success with the project.

Sincerely

PROF AF GROBLER
CHAIR: COMMITTEE FOR RESEARCH ETHICS

cc: **Prof KJ Stanz**

Members:
Prof AF Grobler (Chair); Dr N Barkhuizen; Prof C de Villiers; Prof JHvH de Wet; Mr T Gerber; Prof JF Kirsten; Prof B Lubbe; Ms K Plant; Prof M Stiglingh; Prof C Thornhill; Prof R van Eyden; Prof J van Vuuren
Ex officio **members:**
Chair: Research Committee; Prof SR van Jaarsveld, Faculty of Law

APPENDIX F

APPENDIX F: GLOSSARY OF ABBREVIATIONS AND ACRONYMS

Abbreviation	Description
AsgiSA	Accelerated and Shared Growth Initiative for South Africa
BBBEE	Broad Based Black Economic Empowerment
BU	Business unit
CAQDAS	Computer assisted qualitative data analysis software
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CMP	Construction Management Programme
CMR	Complete member researcher
CU	Corporate university
Exco	Executive committee
FET	Further Education and Training College
FIFA™	Fédération Internationale de Football Association
FY	Financial year
G5B3	A junior management programme (Group Five Building Business Basics)
HR	Human Resources
HSRC	Human Resources Research Council
IT	Information Technology (department)
JIPSA	Joint Initiative on Priority Skills Acquisition
L&D	Learning and Development (Forum)
Learnership	A learnership is a vocational learning program. It combines theory and practice, culminating in a registered qualification. A learnership is normally undertaken over a period of one year. A person who successfully completes a learnership will have a qualification that signifies occupational competence and is recognised throughout the country.
Manco	Management committee
MD	Managing Director
NQF	National Qualifications Framework
	An integrated national framework for learning achievements that sets out to recognise all qualifications, learning programs and informal learning on standardised levels, as per the framework following this table. New qualifications and unit standards are accredited according to these levels through ETQA bodies.

OB	Organisational behaviour
ODETDP	Occupationally Directed Education Training and Development Practices qualification
Ops	Operations
PMD	Programme in Management Development (management development programme run in conjunction with a leading business school)
PPM	Programme in Project Management (a customised built environment programme run in conjunction with a leading university)
SAQA	South African Qualifications Authority An authority established in terms of the South African Qualifications Authority Act (No. 58 of 1995) with the express purpose of establishing, implementing and monitoring the National Qualifications Framework.
SARPN	South African Regional Poverty Network
SED	Socio-Economic Development
SETA	Sector Education and Training Authority A SETA for each of the twenty-five identified economic sectors – or sub-fields – was established initially in accordance with the Skills Development Act, but have since been reduced to twenty-three as a result of amalgamations. SETAs receive 80% of the levies paid by employers registered as members of that economic sector. SETAs main functions are to oversee learning activities in their specific sector, to promote learnerships, to promote the development and accreditation of learning programs and to perform quality assurance and certification functions. Part of the percentage of skills development levies that an employer pays to his SETA can be claimed back from the SETA if a workplace skills plan is developed and implemented.
SHE	Safety, Health and Environment
SME	Subject matter expert
Steerco	Steering committee
WSP	Workplace Skills Plan A workplace skills plan is submitted annually by employers that have more than 50 employees to the SETA that the employer is registered with. The WSP indicates the skills development priorities and objectives of the employer and states what skills development activities are planned for the following year. If the employer pays skills development levies and submits a WSP, he receives a mandatory grant refund from the SETA.