DOES SITUATED LEARNING PROVIDE THE "EDUCATION" NECESSARY FOR SOCIAL ENTERPRISE DEVELOPMENT?

POSKYTUJE SITUAČNÉ UČENIE “VZDELANIE” POTREBNÉ PRE ROZVOJ SOCIÁLNEHO PODNIKU?

WHITWORTH Christopher - ZONTEK Zbigniew

Abstract
The authors are currently researching the Situated Learning and Knowledge Transfer occurring in a sample of social enterprises. This paper presents the research methodology and an illustration of preliminary findings. The authors have studied nearly 10 Social Enterprise groups over the last 5 years. These groups (in England and Poland) are all self-starting Communities of Practice, operating as not-for-profit social enterprises with specific agenda's. Semi-structured qualitative interviews have so far been undertaken with over 25 individuals, in disparate sectors, from health care support to village festivals. The results have revealed a desire to educate and disseminate knowledge among its members, and to the outside world.

Introduction
Objective of this paper is to provide a preliminary report on research into the Knowledge Transfer occurring in Social Enterprise Communities of Practice, in the UK and Poland. This study has been undertaken to increase understanding of people's motivations and methods to participate and acquire specific education and learning, in social enterprise situations. This paper outlines the processes undertaken and progress to date.
1 STUDY DESIGN AND RESEARCH METHODOLOGY

1.1 Principles

The study has been designed to document and evaluate the drivers of Situated Learning\(^1\) that occurs in a sample of individuals and their groups. The people and groups interviewed were purposively selected to contain functioning Communities of Practice\(^2\). Although originally a concept from Lave and Wengler, this has now been extended significantly, by, among others Cox\(^3\). The study has been undertaken in the UK and Poland. The authors have selected a range of disparate groups and considered why and how members joined their respective groups and communities, their motivations for doing so, their subsequent Situated, Social and Cognitive Learning, and thus the Knowledge Transfer that occurs between group members and/or is acquired from outside, in this Social Enterprise context.

1.2 Design Detail

The design started with definitions of key terms. The chosen sector is “Social Enterprise”, which has been widely studied but not well defined. The authors needed some boundaries, so for their purposes define Social Enterprise here as *individuals that form or join groups, that then labour to develop specific products and/or services, then give them away, or recover cost only*. The selection of groups was informed by Salamon and Sokolowski\(^4\), who provided a loose definition that was used in selection of groups for study. They looked at a broad range of entities that meet five key criteria:

- They have some kind of formal organizational structure (e.g., a set of rules, formal or informal, that define goals, activities, membership, selection and competencies of officers, the use of resources, etc.);
- They are self-governing (i.e., are not a subordinate part or agency of another organization);
- They are not profit distributing (i.e., any surplus generated by their operations is plowed back into the organization, not distributed among the organization’s officers or owners);
- They are private (i.e., are not a part or an agency of the government);
- They are voluntary (i.e., membership is not coerced or mandated by law, and the entities customarily receive donations of money, other property, or labour).

How and why the groups formed, and their interactions are best described as *Communities Of Practice*\(^5\) (CoP henceforth). A CoP has been identified as being a group where “*soft or subtle*” (so implicit rather than tacit) knowledge is created, shared and sustained\(^6\). The concept of a CoP was originally introduced by Lave and Wenger, who used it to explore Situated

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Learning. The concept here is used as a theoretical framework from which to explore the chosen phenomenon, of Situated Learning, and its drivers in Social Enterprise. The authors assert that the committees and groupings overseeing the studied Social Enterprise groups each operate as a CoP.

1.3 Data Capture

The authors have considered ways to establish why and how members joined their groups and communities, their motivations for doing so, and their subsequent Situated, Social and Cognitive Learning, or Knowledge Transfer. They have established how to identify when and how this occurs between group members and/or is acquired from outside, in this Social Enterprise context. Qualitative inquiry was the chosen approach. As described by Cresswell it represents “a legitimate mode of social and human science exploration (…). Good models of qualitative enquiry demonstrate the rigour, difficulty and time-consuming nature of this approach”. The intention is that the researcher “gathers words, analyses them inductively, focused on the meaning of participants, (to) describe a process (…)”8. From the author's prior experience they recognise the “multiple dimensions of the problem or issue, and wishes to display it in all its complexity” 9. Thus the authors take the ontological position that human reality is subjective and that “variables can not be easily identified, theories are not available to explain behaviour of participants (…)”10. This approach, using concepts discussed by Cresswell above, predicates a general approach to research design, with detailed research design emergent from the initial research outcomes. It is necessary to experience the perceptions of the participants under study, and look for meaning- from their viewpoint. The phenomenon under study is thus the motivations to involve themselves, subsequent interactions of the CoP members and their perceptions of their own transition from joining and new peripheral membership to eventual mature core legitimacy. Phenomenology is appropriate for this study because it allows the use of an “orienting framework”, a perspective rather than a theory, but a perspective that informs the study and gives it some rigour. To summarise, the authors undertook and extracted significance via narrative analysis of a series of open ended interviews with participants, where possible a whole social network, at the very least enough participants to assess whether theoretical saturation was approached. In each of the Communities of Practice considered, the learning, or knowledge transfer undertaken, and its drivers was assessed. From this they are currently attempting to portray the essences of the learner's motivations and meanings, drawing out common themes, concluding with an integrated narrative which demonstrates the essence or invariant structure of the interactions and behaviours.

1.4 Interview Guidance

Although the interviews were open and relatively unstructured the interviewers ensured that all relevant areas were addressed. The Situated Learning that facilitated the individual's individual journey, from peripheral to full legitimised participation, was explored. The specific context of their group or Community of Practice was addressed in each case. Although the words “Community of Practice” were not usually used or explained, the authors ensured that the groups and individuals interviewed met the criteria for this.

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7 Ibidem.
9 Ibidem, p. 15.
10 Ibidem, p. 18.
1.5 Data Range and Scope

For their primary data collection, the authors have, so far, selected and worked with well over 25 people from nearly 10 disparate groups. All participants have agreed to give full access for the research and subsequent publication. As stated above, all relevant ethical conditions are met and documented.

1.6 Sampling Criteria

All individuals are from not-for-profit enterprises. The authors researched and can defend their definition of this. All groups are formally constituted, each with a different Social Enterprise aim. The sample is purposive: of similarly sized groups from different sectors, chosen and interviewed in 2 European countries (Northern England and Southern Poland). The groups, and the individuals therein, were sampled to cover a range of group purposes, so as to enable the factors common to Social Enterprise Learning and its drivers in a functioning Community of Practice, to be separated from those specific to the declared “technical” purpose of each group. In grouping together to provide a social service, the group's members inevitably create and transfer knowledge internally, on the issues they study. They thus create, and exhibit the characteristics of a Community of Practice undertaking Situated Learning. This work thus studies the phenomena of CoP Situated Learning in an original and new, Social Enterprise context, extending it further outside the original in-firm situations from which CoP study grew, as described initially by Lave & Wenger\textsuperscript{11} and extended by many, including Hildreth & Kimble\textsuperscript{12}.

1.7 Data Analysis

The groups activities, behaviors and culture were captured and reflected upon, by narrative acquisition and analysis. Using a single, or occasionally two, phenomenological open ended interviews separated in time, each individuals recollections and understanding of what drives or drove them to participate in their group, was captured. Interviews took place over between 30 and 70 minutes. All interviews have been anonymised, and are only identified by a code for the group and interviewee number. The purpose of the interviews was explained and the use of the recording devices pointed out. All interviews were very carefully transcribed, word for word, with pauses and hesitancy noted, as required by the research method. Where interviewees identified other group members, their names are replaced by the appropriate code. Consent forms were obtained in all cases. The authors have documented, transcribed and analysed the narrative data using Interpretative Phenomenological Analysis techniques.

From the literature review the authors undertook, it is clear that there is no single, commonly accepted methodology for this type of qualitative study and analysis of attitudes, behaviours and paradigms. The process required is an inductive, phenomenological process of observations “enabling a thorough understanding of the research sample and context” but not allowing “the meaning of events to individuals to be ignored”. This quote is from Bryman & Bell\textsuperscript{13}, and led to the approach of phenomenological data capture, leading to analysis of the captured narrative and a final process of integration. The authors notes that this qualitative, interpretative approach, albeit with considerable variation in detail, is outlined in many of the


\textsuperscript{13} Bryman, A. and Bell, E. \textit{Business Research Methods}. Oxford University Press. 2003, p.86.
papers already read. Although a minority have detailed positivist or even quantitative analyses, the majority have adopted inductive and theory building styles, addressing attitude, behavior and cultural issues and factors. So, a “rich picture” of these attitudinal and culturally influenced behaviors was required, allowing the authors to “explore the meaning and nuances of questions and answers, employing a combination of exploratory and conclusive research strategies”\(^\text{14}\). The study is “underpinned by the belief that knowledge and the processes that lead to its production are context specific”\(^\text{15}\). They go on to discuss the “collection and analysis of non-numeric data in order to provide rich description and possible explanations of peoples meaning-making- how they make sense of the world and experience certain events”\(^\text{16}\). Citing Willig they note how qualitative researchers “aim to understand....how people negotiate relationships...”\(^\text{17}\), quoting family life and work as examples. This approach has been used throughout.

1.8 Interpretative Phenomenological Analysis

“IPA is a qualititative research approach committed to the examination of how people make sense of their major life experiences”\(^\text{18}\). As such it is ideally suited to the author's purpose here. A second quote also illustrates this ”IPA researchers are especially interested in what happens when the everyday flow of lived experience takes on a particular significance for people”. The applicability of this is best defended by a quote from the primary data collection (“I would hate, hate, hate, anyone else to go through what I did unnecessarily...”, Interview L1. This quote by a “L” group individual, suffering from the disease that caused the group to form and share experiences, is used to illustrate the rationale for this choice of research approach. The experience of this CoP member is clearly an event with real meaning to this researcher, and the life experience which prompted it, of similar importance to the interviewee.

Smith J A et al quote the example of how “someone makes sense of a major transition in their life”\(^\text{19}\). In addressing their 2\(^\text{nd}\) major theoretical axis, an interpretative endeavor informed by hermeneutics, the theory of interpretation, they assert that, at sense making creatures, the narrative that interviewees provide reflect their attempts to make sense of the events, that these authors are studying- in his case why he became involved in his social enterprise and how he undertook situated learning once in it. The authors further defends this choice of approach by further quoting “IPA is committed to the detailed examination of the particular case....IPA studies usually have a small number of participants....the aim is to reveal something of the experience of each...As part of this the study may explore in detail the similarities and differences of each case...The aim is to find a reasonably homogeneous sample to examine convergence and divergence in some detail.....Immediate claims are therefore bounded by the group but an extension can be considered through theoretical generalizability...” This is clearly a similar work to the authors here, a small study, in depth of a small group of social enterprises, seeking to make sense of each set of lived experiences and the narrative acquired by primary data collection. Although IPA derives from the field of psychology these authors takes the view quoted by Smith et al, that “IPA’s core interest group

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16 Ibidem.
is people concerned with the human predicament...engaging with the world”\textsuperscript{20}. In summary, therefore, appropriate qualitative discourse and narrative analysis techniques were used to evaluate the drivers and the Situated Learning that occurred, and its context. The primary data from these semistructured interviews was supplemented by analysing relevant secondary data available from the group. This material included minutes, websites and newsletters. The findings were then considered against, and are underpinned by, published literature. This study therefore builds and applies a literature resource of Situated Learning in Social Enterprise Communities of Practice.

2 RESULTS

2.1 Progress to date

At present (late 2014) over 25 interviews have been completed. Most are transcribed. Approximately 10 more will complete the programme. This volume of phenomenological research is unusually large and more than enough for a definitive study. A sample of interview transcriptions has been subjected to a brief analysis, and this confirms the validity of the design. When all primary research work is complete, at the end of 2014, the data collected will be more than sufficient to provide very thorough conclusions and reflections on the drivers for, and subsequent education/Situated Learning that occurred in each Community of Practice, and of each individual therein. Their rationale for their presence in a group and the learning from other group members and outside, will be demonstrated, as will be how it allowed new or peripheral members to move to full participation in their Social Enterprise's Community of Practice.

2.2 Research analysis underpinnings

As stated, this is “work in progress”. However preliminary findings confirm the extensive literature review. Research by Greeno suggested that knowledge cannot be separated from action, because it is situated in activities driven by social and cultural contexts\textsuperscript{21}. This work has been reviewed more recently by Robbins & Aydede\textsuperscript{22}. Applying this, and temporarily accepting this viewpoint, suggests that “knowing” is situated and cannot stand alone. This worldview then infers that actions result from the application of this context-specific knowledge and are driven by its situated roots in prior situations. It has been considered by Lave & Wenger within the CoP context, and is very much based on theories of human behavior\textsuperscript{23}. Users of situation theory see knowing as an action, a dynamic activity\textsuperscript{24}.

Knowing therefore emerges as individuals develop intention through directed activities within the cultural contexts of their CoP. The adoption of their intentions relates to the direction of their attention to the accomplishment of desired goals. Knowing is expressed in their ability to act as an increasingly competent participant in a CoP. As they participate more fully within

\textsuperscript{20}Ibidem.

\textsuperscript{21}Greeno, J. G. On claims that answer the wrong question. Educational Research, 26(1), 1997, p. 5-17.


\textsuperscript{24}Greeno, J. G. On claims that answer the wrong question. Educational Research, 26(1), 1997, p. 5-17.
specific communities of practice, what constitutes knowing continuously evolves. We go on to say that legitimate peripheral participation (LPP) provides the underpinning framework for new individuals to become active in a community of learners. Collins, Brown, & Newman identify 6 features of a “cognitive apprenticeship” that included observation, coaching, scaffolding, modeling, fading, and reflection\(^{25}\). To enlarge on this categorisation the work of Fairclough distinguishes four “research objects”: Emergence, Hegemony, Recontextualisation and Operationalisation\(^{26}\), and relates them to strategic critique. These essentially fit the authors understanding of CoP relationships and, with modifications, are adopted for this analysis. Emergence is understood as, and applied by the authors as; the emerging into the discourse- or mainstream knowledge and awareness of the peripheral members, of how the of the Community of Practice acts, behaves and expresses its values. The emergence can, and in some cases does include, explicit knowledge, whether expressed as public papers, web publication, or internal documentation. It can also include tacit knowledge held by the CoP, expressed in discourse and identified by common understanding but not documented. Hegemony is considered by the authors to be a key concept in any analysis of relationships and behavior, so is addressed in depth here. It is seen by the authors as the power relationships present in the dyadic relationship of social structure amongst the Community of Practice formed and working to operationalise the new technology or process. It is also relevant to the hegemony or power hierarchy of literature on the topic in question. The first point, in the authors worldview, is based around the assumption that each partner will have core competencies that need to be transferred, at least in part to the other. For example it is reasonable to expect that, in an existing group (which all those studied, by choice, are) the “mature” CoP members will be providing expertise, and thus demonstrating hegemonic status. Whereas the Learner will be of inferior knowledge of the topic in question, but potentially able to operationalise it. So they may well both exert hegemonic power in differing contexts. The second point relates to the value placed on sources of information- which may be anecdotal, web based, published or tacit knowledge held by a partner. Regardless of format, it is necessary to integrate and establish value, as perceived by the relevant Community, of each piece of data. They must be synthesised into a whole, as seen by the stakeholders in the Community. As noted by Fairclough\(^{27}\), the “inter discursive” articulation of each concept needs analysis, to establish the level of social practice, and its acceptability or contestation. Stakeholder analysis is of obvious utility here, and has been used extensively.

Recontextualisation is the presence (or absence) of dialogue, discussion and debate between stakeholders as to the utility, application, value and realities of the new learning that is occurring, its usage in the field and from the perception or worldview of the potential user. Operationalisation is seen by the authors as in part, the conversion of a Situated Learner into a mature CoP partner. However, in this study it may also relate to the change in attitude and behaviour of the group, (“new ways of acting and interacting”, Fairclough\(^{28}\), as a consequence of exposure to the semiosis emanating from the Learners inputs. Kolb’s “Learning Cycle” comes to mind here and finds obvious application. So, it can be viewed as the realisation or


\(^{27}\) Ibidem.

\(^{28}\) Ibidem.
operationalisation of the “imaginaries” created as the initial vision of the learner changes and is implemented by their later actions. In this context the acceptance of the new good or process by its peers is then “incorporated into successful strategies”\(^{29}\). So, these terms (with their associated definitions) are relevant to the analysis of primary data undertaken in this thesis. To reiterate: Observation, Coaching, Scaffolding, Modeling, Fading, and Reflection plus Emergence, Hegemony, Recontextualisation and Operationalisation, are noted against the transcripts of interviews.

2.3 Interview Transcript Analysis

Three examples are given here. One from an individual in each of 3 English groups. All these extracts are less than a minute of speech taken from typically 45 minute interviews. (Groups are identified as L, C, Y etc, members of the groups thus become L1, L2, C1, C5 etc):

L1: “And in my personal experience …..my mother was a sufferer, and seeing my mother go through life in absolute agony, day after day, seven hours a day-er 7 days a week, 24 hours a day, is …difficult, and you just wish you could turn to somebody and gain some knowledge of how to make that persons life a bit more livable and help in any way you can. And therefore the L group was set up with that in mind, not as a charitable existence as regarding um...to get, you know funds. That was never its intention, it was there as a support and to help these people, you know, they do have good days and they have bad days. And the majority of the time its bad days, you know there is no pain relief whatsoever ....and asking, in my experience of the L group, coming on to that now, ....” ... “And um so the reason I got involved with this group, was purely through my mum, because I wanted to do something was to help my mother, and um, because I hated to see her suffering every l day, she was alone, she was in the house all day, she was housebound, she couldn't get out, she was you know restricted, and she couldn't talk to anyone about it and I was at work, my father was at work, she was alone but in constant pain all the time and she had no...nowhere to let that pain out, really basically, so we went to the first Yorkshire L group meeting.... and we found, my mum enjoyed it, because it was a social event, it wasn't a meeting, it was held in a social capacity, in that, you know like was a coffee morning or you know it was a social event like for example making a social event as in people getting together, you know, like minded people getting together and talking, and so we got, we started getting involved, and the first thing I did for L was, I mean , because I wanted...had the determination and I wanted to help so much to get it pushed to the limelight that I helped in the first event which was that that ,um I wanted to um.... help make the public aware. We were determined, we had the determination there because we wanted to put across... so much about this disease. And hoping to transfer that learning and that knowledge.” This is clearly moving and demonstrates Observation, Reflection, Recontextualisation, Hegemony and Operationalisation. (L is a group supporting sufferers from a rare autoimmune wasting disease).

A second example, C3: I decided to run it, and...sort of...be the Chair, basically because the long standing Chair, C2???, from the NT, umm, C2???. had been the Chair for 10 years or so, a very long time at least, and he err...he was ready to retire, and wanted to step down for personal reasons, and... I just thought, this would be a good thing to do you know, and I am capable, -I can do it. So, I decided I would do that then, umm, and that was fine, you know and yeah, I quite enjoyed it. I enjoyed the fact that as Chair I was sort of, able to meet more people, to get more people involved, umm, In terms of knowledge transfer I suppose I was keen to bring my knowledge to the committee, that was one of my own...desires, you know, err,

\(^{29}\) Ibidem.
I thought I knew something about Project Management, I felt I knew something about, if you like the business environment, and so I was keen to bring that to the committee, to add value to the local community in that way. But I was also keen to get people on the committee to bring their own professional expertise with them. We were very lucky, in my last year as Chair, one of our new committee members, in that year 2011 was a local police officer, and he was very useful in helping us with liaising with the police obviously and... err, also knowing things we needed to know about safety and security for the public and so on. And that was the other thing I was keen for my time as Chair, was to bring more systems, to bring more procedures, so we brought in more and more defined Health and Safety, more documented risk assessments, we invited St John's Ambulance, which was the first time we had done proper structured First Aid, although we had in the past we had had a couple of volunteers to tell us about Health and Safety, you know. It was the first time we had really done it in, what I regarded as, in a proper, systematic way. So I was keen to bring that to the committee and again, I think it was something that stuck, but also was in mind at the time that the Local Authority that grants us the permission was pushing for more documentation, more systematic procedures and so on. So it all seemed to be appropriate and that was, kind of, what I was hoping to bring to it all. This demonstrates Reflection, Coaching, Operationalisation, Scaffolding etc. (C is a rural village group, which organises a “Cuckoo Day” festival).

Finally, AA1: its very, very organic in that way. you pick things up from each other, particularly the ways, of putting things over in an effective way. Err, and obviously, people who are new to it are quite nervous. Maybe not quite sure of what they are doing, what they are saying, so yeah, but there is no (pause). There is a err, actual formal training session for the actual, formal Power Point presentation, but when it comes to standing in a gazebo in the middle of a wet field it err, in a rainy July, then, there is only one way to learn. That is to get in there and do it... Err, the reason that I prefer working for Yorkshire Air Ambulance is, ... I guess you would almost call it a selfish reason in that I can see exactly where the money is going. I can see where my efforts are making a difference. Cos, you see the yellow helicopter flying in and out of Leeds General Infirmary and other hospitals. And, because of what I do I get to meet people, that's picked up. And I have met people whose lives have been saved by... the efforts that I put in, and... you just can't buy that, can you?.....And (pause) it gets me (pause), to go to places that normally, I just wouldn't even think of going to. I go to events that normally I wouldn't even think about going to. Like, err, a couple of weekends ago I went to a wrestling match in Castleford. Previously I would never have even thought of going to something like that. But we had a right old time. It were grand! ...Umm, you know, you, err, We regularly now go to the Bramham Horse Trials, not something I would go to. But, you know there is a huge link there. And, yeah, you can see, as I am sure you can appreciate the link between people who ride horses and the Air Ambulance. This demonstrates Reflection, Contextualisation and Operationalisation etc. (AA1 is the Yorkshire Air Ambulance (Helicopter) service. It is deliberately not anonymised at AA1’s request!).

These 3 extracts, whilst not reported in depth here, demonstrate the depth of data in these transcripts, and illustrate how they are being mined. The use of 2 models or theories here does not represent the full depth of analysis currently being undertaken.

**CONCLUSION**

The authors conclude and assert that this analysis, once complete, will provide an original contribution to learning, especially as it is considered against the context of published...
literature on Situated Learning, from other applications and contexts. Analysis of (so far),
over 30 hours of transcripts, in English and Polish, will allow others to consider whether the
common Knowledge Transfer activities and behaviors, inherent in the education and learning
the Social Enterprise Community of Practice members undertook, may be of value and
potentially transferable to other Social Enterprise situations.

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**Contact information**

Christopher WHITWORTH MBA, DipWEM, PGCHE, DMS
Jacka Solicy 1
Bielsko-Biała
Poland 43-382
E-mail: Chriswhitworth26@gmail.com

Zbigniew, ZONTEK, Assistant Professor
Faculty of Management and Transport
University of Bielsko-Biała
Willowa 2
Bielsko-Biała
Poland 43-300
E-mail: zzontek.ath@gmail.com