

UNLEARNING AS A LIFELONG LEARNING STRATEGY: AN IMPORTANT PATHWAY FOR TRANSITIONS

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ABSTRACT

Unlearning is of increasing interest to educators and human resource development professionals alike. Whilst recognition of prior learning is widely accepted, it is less likely that development programs acknowledge this prior knowledge as a potential block to the acquisition of new knowledge and behaviours. A paper presented at the 2004 International Lifelong Learning Conference (Windeknecht and Hyland, 2004) proposed a model of unlearning. As a result of subsequent research, the model has been further developed. This paper shows the evolution of the model and presents initial findings from a range of case-study individuals.

INTRODUCTION

The importance of being able to unlearn previous habits and behaviours in order to embrace changing technologies and processes is growing and is becoming an important part of lifelong learning. This paper builds on a previously developed model of unlearning (Windeknecht and Hyland, 2004) and reports on a study seeking to back up the many theories about unlearning (Hedberg, 1981; Klein, 1989; Newstrom, 1983). There are a growing number of researchers and writers discussing the concept of unlearning (Magrath, 1997; Mariotti, 1999; Sherwood, 2000; Sinkula, 2002).

However, substantial research and empirical evidence in the area are both lacking. This research aims to address this gap, by reporting on the findings of an exploratory study focusing specifically on unlearning as it has been experienced in three different organizational settings. Thus, this paper briefly outlines the model developed, and then presents the findings from the interviews conducted.

THE UNLEARNING MODEL

A model was developed previously and presented at the 2004 International Lifelong Learning Conference (Windeknecht and Hyland, 2004). Its function was to integrate factors impacting learning and unlearning at both the individual and organizational levels and it is shown as Figure 1.

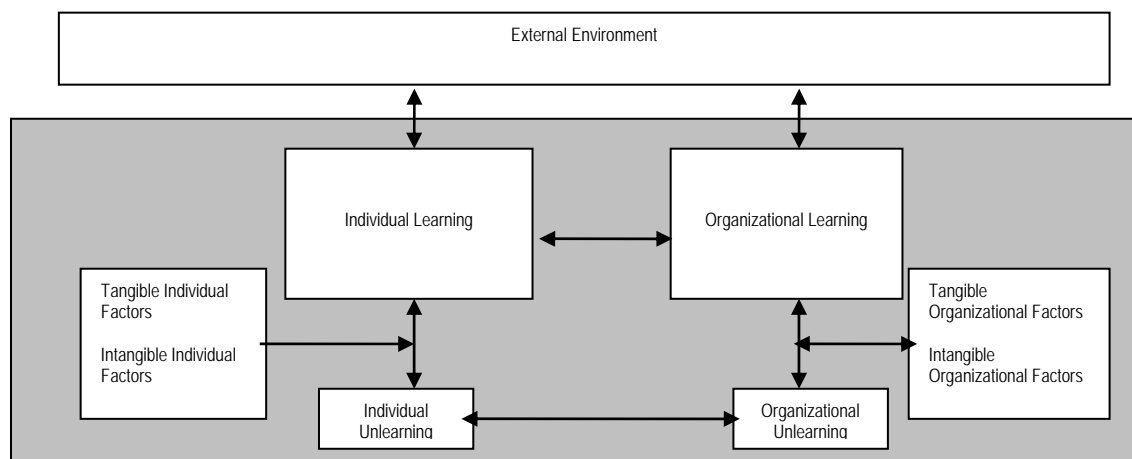


Figure 1. A model of unlearning

This model proposes that there exist a number of influences on an individual's – and an organization's – ability to learn and, particularly,

to unlearn. At the individual level, researchers and writers have identified the difference between explicit and tacit knowledge (Durrance,

1998; Newell, Robertson, Scarbrough, and Swan, 2002; Nonaka and Takeuchi, 1995; Roy and Roy, 2002). Explicit knowledge refers to the easily expressed and easily documented knowledge or information. At an organizational level, such explicit knowledge is generally found to be "captured" in organizational manuals of procedures and processes, or in job descriptions. The model utilises the term *inert knowledge* (Delahaye, 2005) to indicate the relatively stable nature of such information.

Tacit (or implicit) knowledge, on the other hand, relates to information not easily explained or documented, and is often referred to as know-how. Importantly, it is this tacit knowledge which often makes the difference between an average and an excellent employee – not necessarily what they do, but how they do it. Generally, it is common to see tacit knowledge discussed only as it exists within individuals. It is suggested, however, that in a broad sense, the recently discussed issue of organizational memory within the organizational learning literature in many ways reflects tacit knowledge at an organizational level. Anand, Manz and Glick (1998) discuss systemic memory (equated with organizational memory) as distinct to group or individual memory, and suggest that being able to access "soft knowledge" (i.e., tacit knowledge, belief structures, etc.) is essential for organizations to function effectively. Argyris and Schon (1978) acknowledged the role of organizational memory recognising that "... in order for *organizational* learning to occur, learning agents' discoveries, inventions, and evaluations must be embedded in organizational memory" (p. 19). Again, this lends support to the proposed model which equates organizational memory at the organizational level with tacit knowledge at the individual level.

Finally, the third level considered within the model focuses at an individual level on frames of reference and, organizationally, on culture. Mezirow (200) defines frames of reference as those deep-seated underlying values and belief systems that guide, shape, and dictate the everyday attitudes and behaviours of the individual. He goes on to suggest that what we do and do not perceive, comprehend, and remember is profoundly influenced by our frames of reference. At the organizational level, the equivalent of frames of reference has also been utilised to depict the many stories, rituals, commonly-held beliefs, and way of operating inherent in organizational culture. A great deal of recognition has been given to the impact that

organizational culture can have on the ability of the organization to make decisions, learn, and grow.

The previous literature highlights a number of key areas in the overlapping domains of individual and organizational learning, and also identifies a number of possible factors influencing learning and unlearning at both the individual and organizational level. Figure 1 presents a model that draws these concepts together. A number of key points need to be emphasised about the model. Firstly, the overlapping of learning and unlearning at both the individual and organizational level is intended to ensure that unlearning is not seen as an end in itself. As Huber (1991) notes, "unlearning is conceptually subsumable under learning. Use of the word 'unlearning' serves primarily to emphasize a decrease in the range of potential behaviours, rather than to indicate a qualitatively different process" (p. 104). The model also serves to emphasise the large interplay between the range of possible factors involved in learning and unlearning at both the individual and organizational level. Finally, it suggests that this learning and unlearning takes place in a particular context, with the external environment of the organization also acknowledged for its possible influence. It is this model that was considered to offer a further element to the broader concept of lifelong learning and that was tested further within this exploratory study.

THE EXPLORATORY STUDY

The aim of this exploratory study was to provide an initial test of validity for the model of unlearning. Taking a qualitative approach to this initial stage was intended to illuminate the concept of unlearning, and to provide some insight into how unlearning occurs in everyday work life. A total of six in-depth interviews, each lasting approximately one hour, were undertaken across three organizations: an administrator in a university (female); a teacher in a high school (male); and four staff (two supervisors – one female and one male, a female production worker, and a female administrator) in a commercial laundry located in an Australian capital city. The choice of educational and production settings was made in order to provide some contrasting data for the unlearning model. In the educational settings purposeful sampling was used while the snowballing sampling technique (Glesne, 1998) was used in the commercial-laundry location. Each of the participants from the educational

sector was asked to nominate a recent change in the organization which had resulted in a significant personal effect. In the commercial laundry, the most dramatic recent changes had been an altered organizational structure, increased empowerment of staff, and a change to a seven day operation. The researchers considered that the changes nominated would all have required significant unlearning.

Convergent interviewing was used as both a data collection and data analysis method. Convergent interviewing is an iterative process whereby the actual content of the interview is not structured but left to the participant to direct (Dick (1990)). In contrast, the process of interviewing and across interviews is relatively structured. As interviews progress, the objective is to identify areas of agreement and disagreement between participants until convergence occurs, both within the interviews and across interviews, and any divergence remaining can be adequately explained. Following a quality process is the key to reliable data collection (Cavana, Delahaye, and Sekaran, 2001). In particular, probe questions are important within the convergent interviews, as is the use of clarifying and rephrasing techniques by the interviewer. Also important is the recording of responses to allow for future reference and analysis. These factors were all taken into consideration during the conduct of this research.

DISCUSSION

This exploratory study provided the opportunity to consider the model, originally developed as a result of an extensive literature review, and to refine some areas for further investigation. Considering firstly the individual's explicit and tacit knowledge, in many cases the participants referred to their previous skills and behaviours before discussing the new ways of working. They often linked the amount of time they had spent in the organization or the industry to their level of knowledge, and many used this factor to speculate as to how others with more or less knowledge would have felt in relation to the same change. This factor was often mentioned when relating to their experiences of unlearning.

You can see its uses [the new system] but definitely, you kind of look at it.. saying..

well I do my job well (Participant 1).

I just know that certain people who were complaining about it, I know that yes, they have been here for quite a while (Participant 2).

...were I just getting into the industry, I can imagine that it would be very overwhelming.... And if I was later on I could see that I might be offended at someone saying I'm doing it wrong (Participant 1).

The way an individual perceived the changes and the necessary learning was also a strong theme from this initial exploratory investigation. It appears that the comments made by participants, in relation to their individual approach to the change or their outlook on the unlearning required, was often related to the individual's specific personality characteristics and/or frames of reference. Most participants referred to their own approach and contrasted it to others, indicating individual differences when encountering the same change and requirement to unlearn and learn. Again, this offers at least initial reassurance that these individual factors of personality and frames of reference are worthy of further consideration.

It was just a matter of wanting to sit down and learn it, and do it individually. Whereas, when [other staff] found out this is what's going to happen, they kicked up a bit of a fuss; they weren't willing to just give it a go.

But people don't realise that nowadays you have to keep up with new technology, and I believed it was just positive (Participant 2).

The existence of organizational inert knowledge in the form of policies, procedures, processes, systems, and structures was identified as a possible influence on individuals and their experience of unlearning. Whilst this did not receive as much consideration as some of the individual issues – or of the deeper organizational issues such as culture – brief references were made to how a past practice, structure, or system made it difficult for individuals during the transition period.

Organizational memory can be considered to be a function of longevity and size of the organization (Berthon, Pitt, and Ewing, 2001), and is identified as representing the learning held not by individuals but within the organization as a collective (Levitt and March, 1988). Many of the participants, as part of relating their stories of unlearning, referred to the length of time they had been in the organization and what they had seen during that time. In particular, the significant age of the commercial laundry was highlighted by a number of the participants, providing at least early indications that this is considered worthy of further investigation when reflecting upon the unlearning process. Some of those more experienced in their roles also acknowledged

the contribution they made to providing newer employees with background information about the organization. This may or may not be considered helpful to the unlearning process, but it will be the focus of ongoing consideration.

I've got that little building up there I can hide, but it doesn't help the other two.

Because I've been here longer than the other two, and they pick my brain for the information.

The thing that like in this organization, because we have a lot of history and for me and the people, other people at my level, it was quite a shock when actually [name] became our general manager (Participant 3).

One of the single most identified issues from the interviews conducted during the study was that of organizational culture; this being raised by every participant. When asked to reflect upon the things that helped and hindered the unlearning processes, all participants provided many examples which can be regarded as part of the culture of the organization. Many related examples and stories of how the culture of the organisation either supported and encouraged the change to occur, or how it hindered the ability for some to embrace the changes that were occurring. Many links between unlearning and organizational culture can be drawn from the literature, and these preliminary findings from the pilot study indicate that it is a factor in unlearning that requires further analysis.

... all our previous general managers were yelling, "do what I say – or there's the door" type managers... all of the little things that our manager's said that he's going to do, he has succeeded and done (Participant 3).

... they're [management] easy to talk to and approachable, but the other ones I found that I couldn't go up and say, "hey look, you know, can you help me with this?"

... so basically just having the freedom of discussion and knowing that we could make choices, and we weren't gonna be told it was no good, we just had that freedom to keep trying (Participant 6).

As the external environment was only identified specifically by one participant as impacting on

the change process, this study has indicated that this factor is either ephemeral or very indirect. Although it would appear to have the potential to effect an individual's ability to unlearn, these findings also suggest that there are other individual and organizational factors that are more commonly identified with the possibility to either help or hinder the unlearning process.

REVISED MODEL AND CONCLUSIONS

The initial findings from this study indicate that the model developed as a result of the review of current literature is a useful starting point for further research. The original model was based on factors emanating from the literature at both an individual and organizational level. However, it is also clear that there are, potentially, other factors not as commonly identified in the literature. For example, one of the organizations in this study is a not-for-profit entity with a specific governance structure related to it being owned by a religious organization. Whilst this is a contextual issue for unlearning purposes, it does not fit neatly into one of the three levels identified in the model. Similarly, at the individual level, issues such as an individual's personality, their learning style, their age, gender, ethnic background, and other demographic information may also be considered factors. The term, "frames of reference", was initially utilised in the model to encompass some of these factors. However, other factors may not be interpreted as clearly fitting into this classification.

Many specific examples did fit into one of the three levels at either the individual or organizational level, but these are not to the exclusion of other factors. Therefore, the model has been modified to reflect the possible existence of other factors – shown as Individual and Organizational Contextual factors on the model in Figure 2. This is not considered a major change to the model. However, it is important to recognise that there appear to be other factors influencing unlearning.

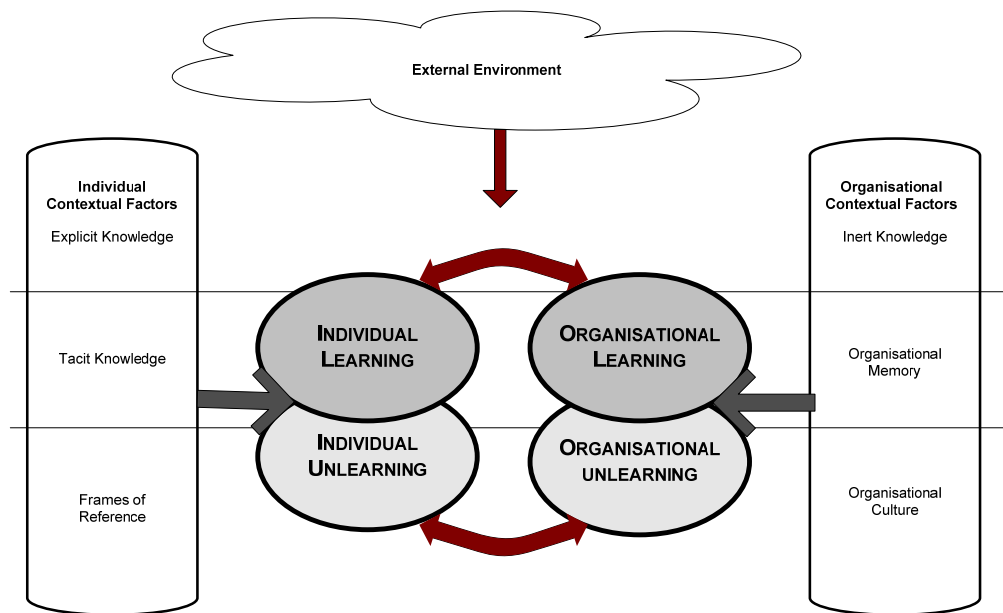


Figure 2. A revised model of unlearning

At this stage in the development of the model of unlearning, it is proposed to undertake a more comprehensive study into factors impacting upon unlearning. From the research conducted thus far, it is clear that a number of key issues in relation to unlearning must be considered if, as educators and human resource development professionals, we intend to promote lifelong learning. Recognising the existence of previous knowledge – both explicit and tacit – and providing the necessary support to facilitate unlearning, will be a critical skill for those in any learning facilitation role. It will also be critical to consider the context in which the learner is required to unlearn and account for these within the learning process.

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