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A Path To Collaborative Strategic Learning

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ABSTRACT

Collaborative learning is critical for the future of any organization and must align with the strategic organizational processes that result in products valued by others. To discover these processes, proposal preparation is explored using topic-oriented ethnography, grounded theory, and an innovative addition to qualitative interviewing, called meta-inquiry.

Using interview data from editors, graphic artists, text processors, scientists, engineers, and technical managers, substantive theory emerges. The research discovers the five essential processes of owning, visioning, reviewing, producing, and contributing needed for organizational strategic learning to occur. The dimensions of these processes are made explicit and can be used to gauge the health of any organization.

The substantive theory also provides insight into the ability of collaborative learning to evolve, flourish, and adapt to the strategic advantage of the organization. Lastly, actionable goals with ten essential elements emerge that link owning, visioning, reviewing, producing, and contributing as a path for all organizations to follow to promote collaborative learning communities and enhance their competitive advantage.

A Path To Collaborative Strategic Learning

Adult education provides members of the work force with the knowledge and skills, called competencies, necessary to enter the work force, but the work place organizational culture determines the success of that work force. **Failure to succeed at a job is most often linked to a lack of understanding of the organizational culture rather than a lack of knowledge of the profession.**

For an academic, for-profit, non-profit, or charitable organization to achieve an edge over their competition essential competencies must blend and focus on the organization's practices and products (Cunningham, 1994; Hofstede, 1997; Pedler, Burgoyne, & Boydell, 1997). Figure 1 illustrates competencies required for a scientific research organization to successfully compete for funds. But to compete and excel, this workforce needs to function as a strategic learning community and focus on their end goal—funded research (Storck & Hill, 2000).

Figure 1. A strategic organization focuses critical processes to achieve a competitive advantage.

For an organization to remain competitive, all work and business processes must be united through joint enterprise called practice (Cunningham, 1994; Wenger 2000).

This learning community is not linked by geography or mutual interests as neither of these concepts of community imply a shared practice (Wenger, 2000). Wenger (1998) defines a strategic learning community, a community of practice, as both a community and an economy enterprise. "A joint enterprise brings the community together through the collective development of a shared practice… negotiated among the participants through…the politics of participation and reification" (p. 209). Affirmation of the community's shared practice results when others value the produced artifacts.

Purpose of Study

The study explores a proposal team that supports major funding efforts at a research laboratory to discover the essential processes needed to cultivate a cross-disciplinary team required for the development of winning proposals. A core purpose of the research is to describe essential team member attributes required to develop competitive proposals.

Qualitative Methods

Discovery of the attributes of team members blends two qualitative traditions, ethnography and grounded theory. Ethnography provides "a description and interpretation of a cultural or social group or system" (Creswell, 1998, p. 58). My research uses a facet of the ethnographic tradition, topic-oriented ethnography, to focus on an aspect of organizational life, proposal preparation, existing in the work community (Spradley, 1980) and explores three primary elements of the proposal community-place, participants, and practice.

Topic-oriented ethnography frames the interviews with informants—editors, graphic artists, text processors, scientists, engineers, and technical managers—and provides an understanding of the culture of these informants. Grounded theory then

provides a methodology that discovers theory from data systematically obtained, analyzed, and linked to basic social processes (Glaser, 1978).

Meta-inquiry (see Figure 2), an addition to grounded theory methodology that involves the coding, interpretation, and valuing of the responses garnered through initial interviews from a small homogeneous informant group, the proposal team, provides a link between ethnography and grounded theory (Carlson & McCaslin, in press). Using meta-inquiry, ethnography enhances grounded theory analysis and interpretation as the researcher, immersed in the homogeneous informants' culture, gains a deep understanding of the informant stories. This understanding results in the discovery of substantive theory and actionable goals.

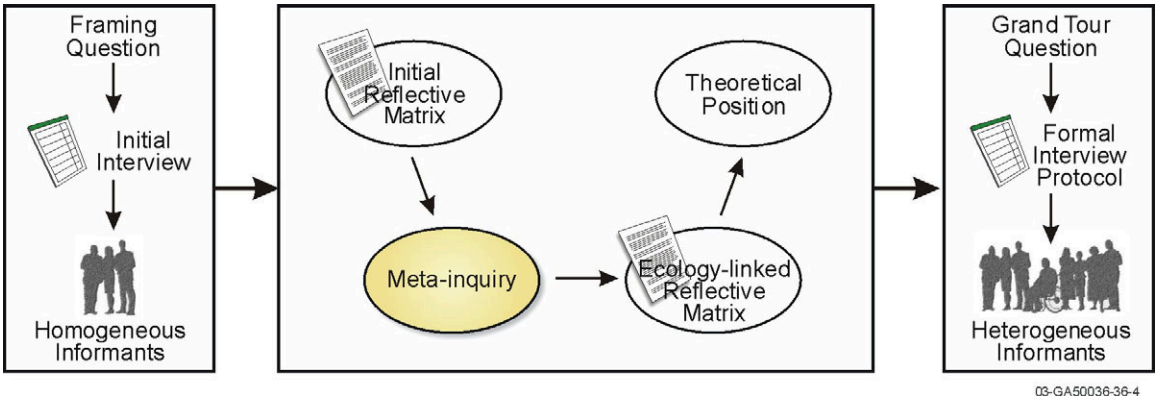

Figure 2. The position of meta-inquiry in the interview process.

Researchers in grounded theory (Glaser and Strauss, 1967) and ethnography (Spradley, 1980) affirm the interrelatedness of the two qualitative methodologies. Glaser and Strauss (1967) present ethnography as a companion to grounded theory. "Ethnographic studies and *multiple theories* are needed so that various substantive and formal areas of inquiry can continue to build up to more inclusive formal theories" (p. 35). And Spradley (1980) points to the connectedness of ethnography to grounded theory when he states,

> Much social science research has been directed toward the task of *testing* formal theories. One alternative to such theories, and a strategy that reduces ethnocentrism, is the development of theories grounded in empirical data of cultural description, what Glaser and Strauss (1967) have called "grounded theory". Ethnography offers an excellent strategy for discovering grounded theory. (p. 15)

Significance of the Research

Organizational culture is learned. "People everywhere learn their culture by observing other people, listening to them, and then *making inferences*" (Spradley, 1979, p. 8). For a successful proposal effort the proposal team must become a strategic learning community linked by evolutionary work processes aligned with each proposal opportunity. Additionally, the proposal team members must enculturate new team members, including authors, to effectively use this process so that the author's concepts are persuasively presented to the funding agency.

The team uses an established process involving approval by senior management to respond to a proposal request; preparation of templates and checklists for authors; assistance to authors with writing conformal and responsive text aligned with the funding agency request, illustrations of major concepts to amplify the text; and formatting and production of the submittal documents. For the proposal team to product a valued product, members must learn enabling basic social processes such as interdependence (Glaser, 1978).

Interdependence, or collectivism, is the norm in eastern culture while individualism is the norm in western culture (Forsyth, 1999; Hofstede, 1997).

Hofstede (1997) provides the following insight into the organizational cultural implications of individualism and collectivism when he writes,

> *Individualism* pertains to *societies in which the ties between individuals are loose: everyone is expected to look after himself or herself and his or her immediate family. Collectivism* as its opposite pertains to *societies in which people from birth onwards are integrated into strong, cohesive ingroups, which throughout people's lifetime continue to protect them in exchange for unquestioning loyalty.* (p. 51)

The importance of interdependence in a proposal effort is shown in Figure 3, as the proposal document is the creation of an integrated, aesthetic whole by a cross-disciplinary team. This aesthetic whole, designed to persuade, integrates concept, structure, form, and unity (Lawrence-Lightfoot & Davis, 1997). The author provides the **concept**, the basis for the proposal process, with their innovative and compelling research idea or engineering approach. The editor provides a **structure** for the author's concept. Part of the structure is dictated by the funding agency's proposal requirements, but the editor, in collaboration with the author, crafts a unique proposal fabric to clearly and concisely portray the author's concept. The graphic artist provides a pleasing, artistic **form** to complete and amplify the textural structure thus bringing the text to life for the proposal reviewer. Through the layout process text processing integrates the text and graphics into the final fabric with its unique texture and design giving **unity** to the proposal.

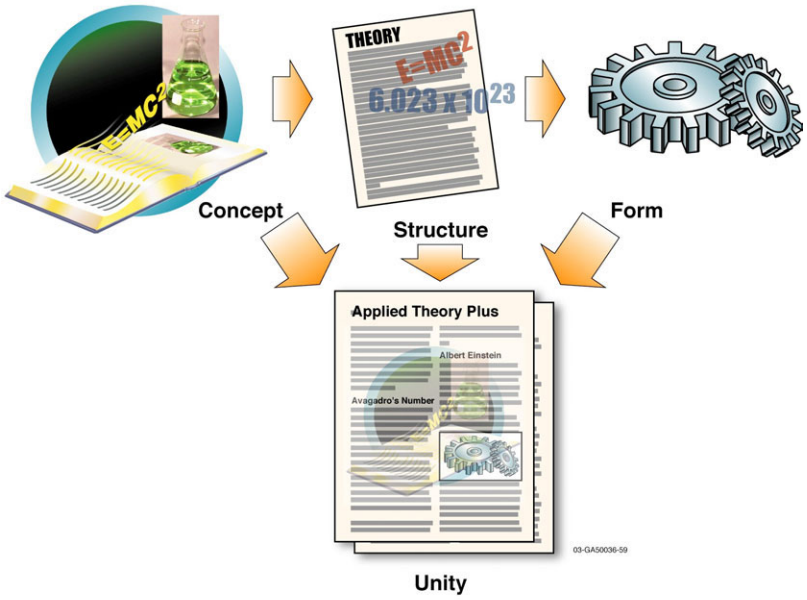

Figure 3. The author provides a concept; the editor provides structure; the artist provides form; the text processor provides unity.

Substantive Theory

For organizations to obtain an intellectual advantage over their competition, there must be a learning culture that promotes regular interaction, mutual interest, recognition of the intrinsic value of learning, and incentives for sharing among members of the same community of practice and between communities of practice (Storck & Hill, 2000). The proposal team research provides the **substantive theory that an organizational learning community can evolve and be cultivated within an organization to the benefit of that organization**. This learning community involves five essential and interrelated process concepts that are intimately linked to strategic business processes and learning—owning, visioning, reviewing, producing, and contributing—as shown in Figure 4. These process concepts, vital for any healthy organization, capture the evolutionary and dynamic nature of the proposal practice.

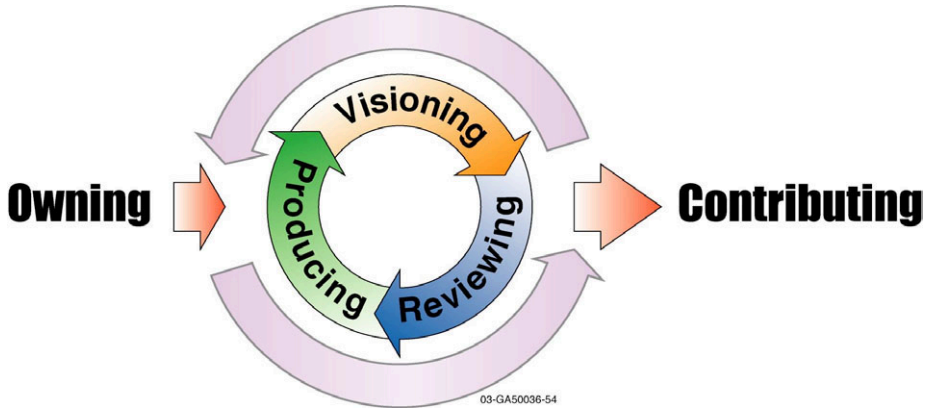

Figure 4. Proposal community's essential and interrelated process concepts.

These five process concepts have explicit dimensions required for strategic organizational learning to occur.

Owning

The dimensions of owning

- Working on a team
- Personally satisfying
- Challenging learning
- Being flexible
- Exciting
- Capably doing the job
- Willing to do extra
- Having fun

capture the personal value team members place on owning (McDonough, 2000). The team is dedicated to their practice which is demanding, challenging, time intensive, but fun. All members verbalized that the proposal process provides them with self-satisfaction because they use their high-end skills on documents.

Visioning

Team members not only own their practice but they actively engage in visioning about that practice. As the team works only on documents valued and sanctioned by senior management, the team engages in visioning to "add value to a business enterprise" (Mead, 1998, p. 353). The dimensions of visioning voiced by the informants are

- Selling the idea
- Actively controlling the process
- Creating process tools
- Valuing process tools
- Allowing author to focus
- Working with management
- Enhancing practice.

The tools—templates guidance documents, and checklists—developed by the team arise from the visioning process.

Reviewing

The unique dimensions of reviewing include

- Importance
- Accuracy
- Qualifications
- Presentation
- Benefit.

One facet of reviewing focuses on the internal technical review process, a required part of all proposal efforts. The proposal team is constantly reviewing its practice by working

collaboratively with other team members and the authors (Liedtka, 1999). Hughes (2002) provides insight into reviewing when he states,

> A knowledge-centered approach argues that technical communicators need to be brought in as soon as possible so they can facilitate the complex process of knowledge creation and promotion. Rewrites are seen as the natural emergence of knowledge and, therefore, a source of value rather than inefficiency. (p. 284)

Producing

Authors view producing as an unique process while proposal team members view the proposal product as the goal of their practice. Team members know that goal will be achieved. But the authors view the production of the document as a unique process in proposal development with the dimensions of

- Scheduling issues
- Production issues
- Peripheral participant support.

Contributing

The final process, contributing, speaks of the value of the practice. Redish (1995) indicates that contributing must be measurable, save time, increase end-user trust, reduce redo rate, or increase revenue to add value to an enterprise. Service to the customer and assisting in bringing funds to the laboratory validate the team's efforts.

Visioning, Reviewing, and Producing – The Capacity Potentiator

The visioning, reviewing, and producing processes are the potentiators of the proposal practice (see Figure 4) and result in the development of enhanced organizational learning capacity (Johnson-Holloway, 2001; McCaslin & Scott, 2003). McDonough

(2000) provides another term for the concept of potentiator when he refers to the term "reciprocal process" (p. 222) in the context of cross-disciplinary teams. These interconnected potentiators, or reciprocal processes, simulate learning and build the capacity of the strategic learning community to realize the actionable goals of relating possibilities, evaluating and enhancing potentials, and producing artifacts.

The cumulative effect of visioning, reviewing, and producing is far greater than the effect of each process separately; thus, the cumulative impact of connecting these processes results in an exponential benefit rather than a linear, summative benefit (Cohen & Levinthal, 1990). The potentiator builds the team's strategic learning capacity and is critical for obtaining new research funds. Developing this learning capacity provides the organization with a sustainable future (Pedler & Aspinall, 1998; Thornton, Mattocks, & Thornton, 2000).

The Value of Reflective and Reflexive Practices

In a strategic learning community, reflective and reflexive practices must occur and result in the team deepening their understanding of their practice. Reflection is the process of turning experience into learning by making tacit knowledge explicit through dialogue (Boud, 2001; Brookfield, 1995; Dixon, 1998; Liedtka, 1999; Storck & Hill, 2000). Reflexivity occurs when there is a conscious effort to determine what forces regulate actions, to unthink the commonplace, and remove traditional distinctions to develop a new understanding based on new information (Arseneau & Rodenburg, 1998; Denzin, 1997; Golden, 1992; Pedler, Burgoyne, & Boydell, 1997). The power of reflection and reflexivity is the creation of the possibility for action to vary independently from the culture and the creation of new learning (Golden, 1992).

Liedtka (1999) illustrates the value of reflective and reflexive learning to strategic learning by stating that the

> Ability to learn new sets of skills on an on-going basis has been argued by some to represent the only sustainable source of advantage for the future. Similar to this, collaboration allows organizations to converse, learn, and work more efficiently across the silos that have characterized organizational structures. The ability to redesign processes and continuously enhance their efficiency and quality from the customer's perspective represent...value creation across all products and technologies. (p. 6)

Thus the process concepts of owning, visioning, reviewing, producing, and contributing drive the proposal team to include activities like debriefs to enhance practice and not become entrenched in the status quo.

Attributes and Actionable Goals

For a robust substantive theory to explain the dynamics of the social processes of the proposal team's practice, each process concept becomes a theoretical attribute that results in an actionable goal (Argyris, 1993; Golden, 1992). Moving beyond substantive theory to more generalizable formal theory, actionable outcomes complete the grounded theory approach.

To establish attributes and actionable goals from the substantive theory, I explored the theoretical concept that **a strategic learning community must have the ability to evolve, flourish, and adapt its practice to the strategic advantage of the organization**. The attributes and actionable goals of that theoretical concept follow:

Owning-**actively participating** in the proposal practice

Visioning-**creating the possibilities** of the proposal practice

Reviewing-**evaluating and enhancing the potential** of the proposal practice

Producing-**producing a valued artifact** through the proposal practice

Contributing-**confirming the strategic value** of the proposal process

The explicit dimensions of owning, visioning, reviewing, producing, and contributing, coupled with these actionable goals, provide the potential for diagnosing and addressing organizational learning problems.

To better understand the power of these actionable goals in strategic organizational learning, consider what happens if a process is missing or overly developed. Some simple examples are offered to make each organizational learning disability more explicit.

No owning: Members are assigned to a large proposal team to prepare a multimillion-dollar proposal. The team capably uses their skills, completes the task, and disbands without a sense of personal ownership of the process or product (Kent-Drury, 2000). Another manifestation of no owning is skilled incompetence, when employees actively work to keep themselves from learning (Senge, 1990).

Excessive owning: Members of a document control group develop rules and rituals that add no value to the company other than ensuring the group has work. Another term for excessive owning is stove piping or silos. Excessive owning limits or stops the flow of knowledge. (Armbecht, Chapas, Chappelow, Farris, & et al., 2001; Senge, 1990; Wenger, 1998).

No visioning: Members work in a reactive mode, simply trying anything in an attempt to fix a problem caused by that elusive employee, the other guy (Senge, 1990) or

aversion to change can result in a passion for the status quo (Woren, Ruddle, & Moore, 1999).

Excessive visioning: This is the classic paralysis by analysis. The group that constantly plans how to do work but never executes or develops action learning (Revans, 1998).

No reviewing: Documents with poor science logic and embarrassing errors like typos, misspellings, and subject-verb disagreement are sent to a funding agency (Henning, 2003).

Excessive reviewing: The group develops a negative approach to doing work, constantly finding fault in the work of others and not appreciating the positive points (Carter-Scott, 2000). Thus, the group focuses on what is **not** rather than on the potential of what is.

No producing: The group that frequently misses critical deadlines and negatively impacts the organization image and the company's profitability (Dwyer, 1998).

Excessive producing: A group that sends a constant barrage of notes, letters, procedures, standards, guidelines, and emails of marginal value to the entire organization (Benson, 1998).

No contributing: Group output does not advance the future of the company while costing the company money. Or a researcher who does not publish, propose, or work collaboratively with others (Glaser, 1964).

Excessive contributing: In the proposal learning community this is the desired outcome balanced with reflective and reflexive practice to avoid freezing of the practice (Argyris, 1993; Schein, 1993)!

Validation of the Actionable Theoretical Concept

Making the substantive theory actionable is ongoing with the proposal team as they proactively engage in assisting with proposal or critical funding efforts. Argyris (1993) defines an actionable theory as one that

> Can be used to diagnose and understand individual, group, intergroup, and organizational behavior. Such a theory tells the person or group that uses it how to act *effectively*, how to design and implement actions in such a way that the actions achieve the intended consequences, they achieve these consequences persistently, and they do not reduce the actor's present level of effectiveness. (p. 249)

Using the grounded theory methodology to move the substantive theory towards actionable theory, several qualitative and quantitative research studies in the extant literature were reviewed to establish the validity of my substantive theory and actionable goals. This is a necessary first step to develop an actionable theory. Anfara, Brown, & Mangione (2002) affirm this approach.

> Internal validity is concerned with how trustworthy the conclusions are that are drawn from the data and the match of these conclusions with reality, while external validity refers to how well conclusions can be generalized to a larger population. (p. 33)

Table 1 summarizes the studies in the literature aligned with the processes of owning, visioning, reviewing, producing, and contributing. Brief summaries of these

Table 1

Explicit studies related to communities of practice in an organization

Strategic Group Learning						
	Owning	**Visioning**	**Reviewing**	**Producing**	**Contributing**	**Comments**
Carlson, 2003 Proposal Process Goal = gain funds	Actively participating	Creating the possibilities	Evaluating and enhancing potential	Producing a valued artifact	Confirming strategic value	Looks at a proposal team community of practice in a research and applied engineering laboratory
McCaslin, 1996 Community Development Process	Purpose of participation	Purpose of the process		Purpose of possibilities		Focuses on rural community development in the mid-West
Wenger, 1998 Claims Processing	Participation – Engagement – Joint enterprise – Shared repertoire	Negotiating meaning		Reification		Investigates the community of practice of claims processors in a large insurance company
Argyris, 1993 Eliminate Organizational Defenses Goal = learning organization	Participation by senior management	Productive reasoning – Double loop learning	Action maps – Reveal component causality	Desired consequence – learning organization		Focuses on senior management interactions
Glaser, 1964 R&D scientist promotion and recognition process	Participation in tightly defined groups – Mentoring		Formal promotion process Informal facility assignments	National or local contributor to science knowledge	National recognition	Provides insight into the culture of scientists in a research laboratory based on survey results with no interviews
Robey, Khoo, & Powers, 2000 Cross-functional virtual teams Goal = manage supply chain	Participation in virtual cross-functional teams separated by distance	Meeting – Business – Quarterly	Approaches to increase ability to communicate over distance			Looks at a software company's integration of their northern and southern supply chain functions

studies by McCaslin (1996), Wenger (1998), Argyris (1993), Glaser (1964), and Robey, Khoo, and Powers (2000) focus on strategic organizational learning processes.

McCaslin (1996) explores the role of reciprocating transformational leadership in community development. Community is defined by geography in McCaslin's study, but the processes of owning, visioning, and producing are present. The interplay of human interaction within a community is explored as well as the concept of a human ecology. The focus of the research is on community purpose, a holistic concept, rather than the quantitative concept of measurable goals.

Wenger (1998) explores the facets of a community of practice and establishes the presence of a community of practice in a claims processing department. He builds a strong case for the presence of joint enterprise as he explores the three dimensions of owning-imagination, engagement, and alignment.

Argyris (1993) explores organizational defenses as he works with a company's senior management team. The hope of the management team is evolution of a learning organization. The research provides tools, action maps, to understand the defensive and productive reasoning occurring in group interactions. Thus, Argyris provides an action science methodology to uncover barriers to knowledge development and flow.

Glaser (1964) looks at the culture of a large medical research organization. His research is based on the analysis of survey results rather than interviews with informants, but he uncovers cultural dimensions of the medical research community of practice. Owning in the medical research community is a very personal process shared with only a small group of cohorts for the benefit of the group rather than the organization. Glaser looks at the formal promotion and recognition processes as they relate to a scientist's status in the research organization. The promotion process is part of reviewing while the

recognition process with the actionable goal of nation recognition for accomplished work measures contributing. The producing process relates to adding to the body of science knowledge.

The final study by Robey, Khoo, and Powers (2000) looks at virtual cross-functional teams involved in managing the supply chain for a software company. Although the study aligns with an organizational focus on sales, the study reveals the challenges of developing strategic learning when members are separated both by distance and culture. The study looks at the approaches community members employ to work practice issues, to use creativity in approaching work practices, to solve problems without management oversight using initiative, to provide customers with needed service, and to develop effective means of communicating.

Actionable Strategies Essential for Organizational Strategic Learning

Ten actionable strategies result from the interpretation of the proposal research data and the organizational learning studies in the extant literature. These strategies are explained as they relate to the proposal team, but are applicable to all work groups involved in strategic business processes that result in products valued by others.

Make All Knowledge Explicit Through Dialogue: Dialogue among team members is vital to make all knowledge explicit. Editors, graphic artists, and text processors have been co-located to promote team dialogue. The co-location of the team has resulted in greater team interdependence and cohesion. Also, co-location allows team members to be aware of the workloads of other members and to move work between team members so all tasks are accomplished (Robey, Khoo, & Powers, 2000).

Establish Processes to Enculturate New Members: Each of the senior editors works closely with their junior editor interns to assist them in understanding the editing

standards and the proposal process. Each junior editor is responsible for preparing the guidance, template, checklists, and timeline for a major proposal under the mentoring of a senior editor. The process of preparing the tools makes the importance of the tools clear to the junior editor. It also provides them with an understanding of how to decode grant language so the team and the authors can understand it (Kurstedt & Mallak; 1996).

Gain an Appreciation for the Scientist and Engineer Culture: All team members are responsible for maintaining a close collegial relationship with their assigned proposal author to ensure that the author's tacit concept is made explicit and to proactively work any concerns or issues that occur during the proposal process. The concerns can range from a family emergency, business travel, or illness. The editor makes arrangements with the author to continue working portions of the proposal during the author's absence. The editors assist the authors by initiating literature searches at the technical library, transmitting draft proposal documents to technical reviewers, restructuring text to increase readability, and attending the technical reviewer debrief to establish ways to increase the clarity of the proposal.

Constantly Engage in Knowledge Creation: Debriefs are held after every proposal efforts. The team meets initially to debrief on their view of the proposal process followed by a meeting with the technical manager, authors, and technical reviewers. Disconfirming information is captured in the debrief minutes and used to improve the next proposal process. No mistakes are repeated, but the very process of creating new knowledge means risks must be taken and mistakes will be made. As soon as a team member identifies a potential problem, the team leader and lead editor for the proposal facilitate resolution of the concern.

Develop a Strategy of Shared Leadership: Because the proposal process is ongoing, there is a need for multiple team members to assume leadership roles. On each large proposal effort, a lead editor is assigned to coordinate the team activities based on the established timeline. Shared leadership spreads the decision-making responsibility and allows successful completion of proposal efforts (McDonough, 2000). This leadership role rotates between editors so vacations can be scheduled or personal emergencies do not impact the proposal process. The lead editor and the team leader simply allocate another resource or fill the role themselves. The team cares for each other and freely volunteers to cover work even if it means long days, nights, or weekend hours (Wolff, 1991).

Avoid Establishing the Status Quo: Because of the variability of the language of each proposal call, no process is the same, nor does the team try to make them the same. Each proposal call is carefully read and the proposal tool developer uses reflective and reflexive thought processes to develop the best tools. No matter who develops the proposal tools, another team member checks the tools for completeness and understandability. Junior editors check the work of senior editors just as senior editors check the work of junior editors. New eyes looking at tools make insightful suggestions and uncover cases of tacit ignorance-language that is hard to decode. The focus is to package information in a way that makes it more accessible and understandable by the authors (Hughes, 2002).

Maintain Creative Tension: With the variability of each proposal call and authors knowledgeable about the topical area of the call, the team always is faced with creative tensions. Although the general proposal process scaffolds all team efforts, brainstorming is required before a proposal effort. The challenge is to maintain tension at

a creative level rather than at a high stress level. High stress for short periods of time is expected but should never be maintained as the team can lose creativity and passion for their practice. Problem solving also results from creative tension as the team must focus on providing customer satisfaction in a dynamic process (Robey, Khoo, & Powers, 2000).

Use a Collectivist Approach-Cohesion and Interdependence: Individualists are not well suited or embraced by the team. The dimensions of owning are based in the collectivist culture. Team members need to each be individuals with opinions and insights on practice enhancements, but when they function as a team, cohesion and interdependence are vital for team success.

Leverage Competency-Capacity-Capability to Develop Strategic Knowledge: Members work individually and collectively to understand the laboratory's key strategies. They use the opportunity of working with a wide variety of authors to develop a capacity for learning new knowledge and use the knowledge to discern team capabilities that will be needed.

Knowing the importance of competency, capacity, and capabilities has been extremely helpful when hiring new team members. Those team members who interview potential members are able to ask relevant open-ended questions and probe in the area of interpersonal relationships. Good technical skills are needed to be a proposal editor, graphic artist, or text processor but more important are the interpersonal skills. The reputation of the team depends on happy customers receiving high quality documents.

Value Learning and Laughter: All team members are involved in learning on a daily basis by the dynamic nature of the work, but the team renews once or twice a year by attending an educational class together. We have lunch together after especially demanding proposal efforts. Caring for and valuing the individuals on the team is vital as

each brings a special gift to the proposal practice. No two gifts are the same and that is the power of the team. If two people have identical skills on a team then one is unnecessary as a cross-disciplinary team depends on a good mix of talents. Debate is critical for learning and shared understanding to occur as the team embraces change with a positive outlook.

Conclusion

The processes of owning, visioning, reviewing, producing, and contributing are essential for meaningful joint enterprise. Examining these processes provides a gauge for the health of an organization. Interconnecting these processes aligned with strategic business goals provides an organizational approach for cultivating strategic learning. The result is a strategic, cohesive learning community that evolves and flourishes to benefit the joint enterprise of the organization. As members interdependently own, vision, review, produce, and contribute they are

- Making all knowledge explicit through dialogue
- Establishing processes to enculturate new members
- Gaining an appreciation for contributions others make
- Constantly engaging in knowledge creation through active boundary activities
- Challenging the status quo
- Maintaining creative tension
- Cultivating cohesion and interdependence within and between communities of practice
- Understanding the value of and leveraging competency-capacity-capability to develop strategic knowledge

- Valuing the power of knowledge, caring, and laughter
- Developing a strategy of shared leadership.

The adult learners in this type of organizational learning community are engaged in strategic metagogy, a concept of learning that moves the learner beyond the leader to make a valued contribution in collaboration with others. This knowledge process depends on the interdependence of learning for the benefit of the individual as well as the community. “This community of learning is no longer driven by transactional motives and short-term gains, but by metagogical motives and long-term vision and commitment” (McCaslin & Scott, 2003, p. 14). When the collaborative strategic learning concepts of owning, visioning, reviewing, producing, and contributing are cultivated by an organization and made actionable, the result is a healthy organization with a long-term competitive advantage.

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