INTRODUCING LEARNING PARTNERSHIPS INTO THE AUSTRALIAN TAXATION OFFICE

Kate Collier
Senior Lecturer
University of Technology Sydney

Jacqui McManus
Senior Lecturer
University of New South Wales

Abstract

This paper examines the concept of the worker as learner and particularly the role of peer learning (Boud et al, 2001) as a means of developing a culture of learning in the workplace.

The authors are involved in an ongoing, long-term research project that focuses on the effectiveness of peer learning, and in particular the use of learning partnerships in adult education. They are investigating whether learning partnerships can encourage and improve learning in the workplace. The results of the research to date, reported in this paper, are based on an intensive training program delivered in two tranches (Wave 1 and Wave 2) to 300 employees of the Australian Taxation Office (ATO) from October 2003 to June 2004. Learning partnerships formed an integral part of this program.

The paper explains how learning partnerships were employed to help participants transfer what they learnt into their workplace. It describes the findings that emerged from a preliminary analysis of the research material that was collected after the program was completed.

Introduction

The authors have been recently involved in the design and delivery of a training program for the ATO. The objectives of the training program set out by the ATO in the tender document indicated that as well as a need for skills development, there was an overarching objective: the need to embed and transfer learning into the workplace. This indicated a desire to not simply train but to develop staff and promote organisational learning (Gibbs, 2002).

The ATO was investing significant resources into the training program and wanted to ensure that the skills learnt during training could be retained and sustained back in the workplace. Although not expressly stipulated, a chief requirement of the ATO was that the program should effectively stimulate 'deep' rather than 'surface' learning. 'Deep' approaches to learning require participants to process information so they understand it rather than memorise facts (Marton & Saljo 1984; Ramsden, 1994; Biggs, 2003). Additionally, the course

needed to assist participants 'unpack' their experience and tacit knowledge and make it explicit (Polanyi, 1972; Grundy, 1987) so they could pass their learning on to others.

The curriculum for the program was designed to meet these needs through the implementation of three key adult learning strategies. Those adopted were:

- the setting up of learning partnerships;
- putting aside thirty minutes at the end of each day for learning conversations with learning partners ;
- the requirement that each participant keep a form of learning journal.

A learning partnership is a relationship in which a person purposely plans, learns and reflects with a peer of his or her own choice (Robinson et al, 1985). Learning partnerships provide a forum in which participants can work collaboratively and reflect together on learning activities. They provide support and encourage people to engage with learning issues at a deeper level than if working alone. Learning Partnerships are characterised by openness and active discussion of ideas and processes. The most significant reason for having learning partnerships is to enhance learning during an academic or training program. However, they can also help people link theory to practice and make a contribution to continuing professional development.

Key features of learning partnerships are:
- partners are self-chosen;
- there is regular contact at mutually convenient times;
- learning agendas are negotiated;
- partners give reciprocal feedback to each other;
- class sessions are reviewed;
- content is related to their own experiences;
- class materials and readings are discussed; partners engage with concepts and try out ideas;
- different perspectives and interpretations are made explicit;
- partners provide mutual support to each other. (Boud et al, 2001).

Involvement in this training program created an opportunity for the authors to track the effectiveness of the learning partnerships and complimentary learning strategies. The second research focus was an examination of whether learning partnerships contributed to what the ATO described as a 'learning culture' amongst its staff and what the authors interpreted as a request to help develop a learning organisation (Field in Foley, 2000; Gibbs, 2002). The ATO were very supportive of this project and made this research possible.

Research Methodology

Participants were middle to higher ranking compliance officers within the ATO selected to attend the training program. They needed some time to reflect on the training and return to their work before research could begin but the authors also wanted to ensure participants' experiences during the training were not too distant so that they could recall their experiences accurately. Consequently the research methodology adopted was partly driven by time factors.

It was decided that a survey should be circulated three months after participants completed the training program. A survey was considered the least resource intensive and most effective research method available. It could draw out as much information as possible in a relatively short period of time. This would deliver data that could be worked on immediately and could be expanded later. Future research will analyse the data collected from the survey more comprehensively and use focus groups (Puchta & Potter, 2004; Litoselliti, 2003) and critical

incident interviews (Benner, 1984) to extend the authors' understanding of learning partnerships in this training program.

A survey instrument was developed for on-line (electronic) circulation. The survey was not anonymous because the authors needed to ask additional questions of some of the respondents in later research in focus groups for example. According to Hutchinson however, the lack of anonymity could have an impact on the candor of responses (Hutchinson in deMarrais et al, 2004). Consequently, a covering e-mail to participants made it very clear that their responses would remain confidential and would be collated without individual reference.

The survey began with some demographic questions. These included identification of the area the participant worked in, their age, and the number of years they had worked at the ATO. The core of the survey was based on a ratings scale. These questions covered three phases. Firstly, knowledge and use of learning partnerships before the training program, then perceived value and use of learning partnerships during the training program, and finally whether back in the workforce learning partnerships formed during the training were continued and whether new learning partnerships were formed. A Likert scale (strongly agree to strongly disagree) was used for its useful evaluative qualities, despite possible problems regarding participant's differences in interpretation of the ratings (Cohen et al, 2000).

These ratings questions were followed by eight dichotomous (yes/no) questions. These proved very useful as respondents were forced to express a view one way or the other on the issues raised.

Finally the survey ended with two open ended questions which were designed to solicit some honest personal comments regarding the participants' views of learning partnerships and hopefully enough information to identify participants for further research.

The survey was first piloted and then circulated to participants of the training program by the ATO on-line in August 2004 to the participants that have completed the training program to date. The data was collected and summarised electronically. Trends and themes were identified from these summaries.

Research Results (to date)

The survey results identify various issues that both impact on the setting up of learning partnerships and how these were incorporated into training programs. They also highlight the value and potential uses for learning partnerships in the workplace.

The survey was circulated to 87 Wave 1 participants, 39 of which responded. The survey was also circulated to 203 Wave 2 participants; 120 responses were received. These responses provided the data which was analysed in this research.

There was a clear variance in responses to some questions regarding the use and opportunity to use learning partnerships back in the workplace from participants from the different waves. For example, Wave 1 participants responded to the question about whether they had established formal learning partnerships in the workplace more than three times more positively (36%) than Wave 2 (10%) participants. This was to be expected given the difference in time spent back in the workplace between Wave 1 (seven months) and Wave 2 participants (three months).

The participants were chosen from various areas within the ATO. This means that although they perform similar duties, they specialise in different areas (eg they specialise in specific taxes or types of taxpayers). Seventy nine percent (79%) of Wave 1 participants were all working in the same business line, whilst in Wave 2 only 58% came from that same business line. This is important in terms of the types of partners available in forming learning partnerships. The exposure to different staff and ideas provided the potential for sharing experiences and learning from each other.

Notably there were similar responses from both Wave 1 and 2 participants that learning partnerships are a valuable way to support learning (74% agreement). Significant differences were recorded mainly in respect of maintenance of the learning partnership formed during the program and the feasibility of establishing learning partners back in the workplace.

The learning partnerships formed during the training program were maintained afterwards by 42% of Wave 2 participants compared with only 26% of Wave 1 respondents. This difference was to be expected because in Wave 2 significantly more training time was given at the start of the program for the introduction of learning partnerships and the interpersonal skills that would help their maintenance. This also indicates that there is a need to 'train' people to use learning partnerships if they are to be successfully maintained.

However, many more continued to communicate with their learning partners after the training course was over (44% of Wave 1 and 58% of Wave 2 participants).

The strengths and limitations of learning partnerships

Preliminary analysis of the qualitative data collected suggests that there is a split between those who thought that learning partnerships were an important learning strategy that should be adopted throughout the ATO and those who could not see the benefit of this approach. The experience of Wave 2 participants appears to have been a far more positive one than that of those in Wave 1. Differences were expected because learning partnerships were more strongly embedded in Wave 2.

The emerging themes in terms of the strengths of learning partnerships included the fact that they supported learning, challenged existing ideas and enhanced networking opportunities. Limitations identified were inappropriate partners, participants lack of commitment, facilitation issues regarding timing and attitude. Other factors that impacted on participants' perceptions were the existing organisational practices and the perceived organisational culture. Some of these issues are considered below.

Supporting learning and challenging existing ideas

The comments of those who were positive about learning partnerships identified that learning partnerships can support learning and challenge existing ideas. Additionally, a participant noted that learning partnerships can provide the "emotional and general support needed from time to time in the workplace" (Wave 1 participant). Learning partnerships also seem to have been beneficial in helping some participants further analyse their practice. Boud et al (2001) and Falchikov (2001) reinforce the idea that the support generated through a peer relationship "is an important factor" (p 40) and can help partners "engage with academic issues at a deeper level than if working alone" (p 69).

Many participants felt that learning partnerships also helped them increase their networks within their office and more broadly within the ATO. Most importantly the partnerships enabled them to see how these networks could aid learning within the organisation:

> I have used the principles of learning partnerships to explore and clarify the issues around complex technical matters (Wave 2 participant).

> Everything I learnt though (learning partnerships) benefited the ATO through a greater understanding of the wider issues across the business lines (Wave 2 participant).

Facilitation Issues

The two main issues that were raised regarding the facilitation of learning partnerships were concerned with the timing of learning conversations and the commitment of all facilitators to the learning partnership process.

The placing of learning conversations at the end of the day appeared to be a problem as participant were tired and wanted to go home. However, possibly more of a problem was the value facilitators put on the time set aside for learning conversations. The learning partnerships were the focus of day one, but the adult education specialists who set them up did not meet participants again until day 10, the last day of the program. In the meantime other facilitators from a range of backgrounds were responsible for presenting the program. In Wave 1 there was little briefing of other facilitators on the importance of learning partnerships within the program. In Wave 2, there was some briefing but the facilitators delivering the program never met to discuss the overall educational aims of the program. From the feedback we received from participants it appears that learning partnerships were not necessarily valued by other facilitators; this led to a perception that they were not worthwhile.

Additionally, two facilitators introduced the concept of learning partnerships to participants in small training groups running concurrently. Despite the joint planning and preparation, it is possible that the facilitators had different styles and approaches which may have impacted on the participants' ability and or willingness to embrace the learning partnerships.

There was another factor that relates to the design of the program which may have caused participants to feel uncomfortable with learning partnerships. This was the tension that existed between the experimental, reflective model of learning partnerships (Boud et al, 2001) that was put forward in the day 1 presentation and the template for the learning journal which was filled out daily. The journal emphasised precise outcomes and was handed in as evidence of learning. Some participants commented on the apparent dichotomy of learning partnerships being presented both as a tool for reflection on personal learning and as a method of assessment (Boud, 2001).

The organisational culture

Perhaps one of the key factors that relate to learning partnerships is the concept of reciprocal peer learning. For as Boud et al (2001) notes, "Reciprocal peer learning emphasises students simultaneously learning and contributing to other students' learning" (p 4).

This focus in learning partnerships on 'learning for learning's sake' goes beyond the idea of transferring knowledge to the workplace and is fundamental to the concept of a learning organisation.

Different views were expressed as to whether the ATO was a learning organisation. Some participants viewed learning in the ATO as happening all the time and noted that they had "other forms of sharing learning in the workplace which were very well established", such as mentoring. Others were less convinced that this was the case indicating that the ATO culture was not conducive to the development of learning partnerships. It was not clear why the participants felt the ATO culture was unsupportive of learning partnerships but perhaps the reason is closely aligned with the nature of the organisation

One of the essential elements of a learning organisation is an emphasis on learning to learn (Field in Foley 2000, p 163). Learning to learn encompasses a whole range of processes but most importantly, the idea of learning from experience and critical questioning introduces a need for experimenting and learning from mistakes. In many ways these features are fundamentally intolerable to an organisation such as the ATO. This is an organisation which must be accurate, ethical and transparent in its dealing with its 'customers', the taxpayers. This has caused the ATO to build rigid processes and procedures into the organisation that cannot tolerate experimentation. It is possible that the kind of staff attracted into the organisation tend to be those who are comfortable with this rigid structure. However, the training program that the ATO was asking for in their statement of requirements was one that encouraged creativity (thinking outside the square, looking beyond checklists).

Conclusion

The research data indicate that respondents were polarised in their views of learning partnerships. Findings suggest that those ATO officers who embraced learning partnerships benefited from the experience. They were enthused by the possibility of a change in the organisation. They appear to have used the partnerships to help them maximise their learning within the program and then have transferred this approach to their workplace. There is also evidence that the ATO workers who did engage with learning partnerships have enhanced their professional practice and established stronger networks both within and outside of their workplace.

There were, however, some of the course participants who responded uneasily to learning partnerships and did not see their relevance to workplace practice. There are many possible reasons for this result. These include factors such as the design and facilitation of the program and the organisational culture of the ATO.

References

Benner, P. (1984). *From Novice to Expert*, California: Addison-Wesley Publishing Co.

Biggs, J. (2003). *Teaching for Quality Learning at University*, UK: Open University Press.

Boud, D. (2001). Using Journal Writing to Enhance Reflective Practice. In English, L. and Gillen, M. (eds) *New Directions for Adult and Continuing Education: Promoting Journal Writing in Adult Education*, No.40, Summer 2001, San Francisco: Josey-Bass

Boud, D., Cohen, R. and Sampson, J. (2001). *Peer Learning in Higher Education: learning from and with each other*, UK: Kogan Page Ltd.

Cohen, L., Manion, L. and Morrison, K. (2000). *Research Methods in Education*, London: Routledge Falmer.

deMarrais, K. and Lapan, S. (eds) (2004). *Survey Research in Foundations for Research: Methods for Inquiry in Education and the Social Sciences*, New Jersey: Lawrence Erlbaum Associates.

Falchikov, N. (2001). *Learning Together: Peer Tutoring in higher education*, London: Routledge Falmer.

Foley, G. (ed) 2000. *Understanding Adult Education and Training*, Sydney: Allen & Unwin.

Gibb, S. (2002). *Learning and Development: Processes, Practices and Perspectives at Work* New York: Palgrave.

Grundy, S. (1987). *Curriculum: Products or Praxis?*, London: Falmer Press.

Litoselliti, L. (2003). *Using Focus Groups in Research*, London: Continuum.

Marton, F. and Saljo, R. (1984). Approaches to Learning, in Marton, F., Hounsell, D. & Entwhistle, N. (eds) (1997). *The Experience of Learning*, Edinburgh: Scottish Academic Press.

Polanyi, M. (1972). *Personal Knowledge: Towards a Post-Critical Philosophy*, London: Routledge and Kegan Paul.

Puchta, C. and Potter, J. (2004). *Focus Group Practice*, London: Page Publications.

Ramsden, P. (1994). *Leaning to Teaching in Higher Education*, UK: Routledge.

Robinson, J., Saberton, S. and Griffin, V. (1985). *Learning Partnerships: Interdependent learning in adult education*, Toronto: Ontario Institute for Studies in Education.

THE 5th ASIA PACIFIC COOPERATIVE EDUCATION CONFERENCE
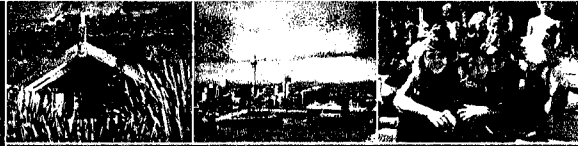
weaving the threads of knowledge

PROCEEDINGS

1 to 3 December 2004
Ellerslie Convention Centre,
Auckland, New Zealand

AUT

NZACE
NEW ZEALAND ASSOCIATION
FOR CO-OPERATIVE
EDUCATION INC.

Promoting Work-Integrated Learning

Asia-Pacific Conference 2004

Asia-Pacific Regional Conference Auckland 2004

Auckland New Zealand was the venue for the biennial Asia-Pacific Conference on Cooperative Education. The New Zealand Association for Cooperative Education acting as conference host. This highly successful conference was held over three days and attracted a worldwide audience of cooperative education practitioners.

Conference Program and Abstracts

The program commenced with an informal welcome reception and registration. Invited speakers, workshops and co-op practitioners offered papers from day one, through to lunchtime on day three. There also was a series of interactive workshops presented by researchers and practitioners of cooperative education. An evening conference dinner was held on day two.

If you would like to see the conference program please click here. To view all the abstracts presented at the conference please click here.

Inquiries can be made to Associate Professor Richard K. Coll or Dr Chris Eames.

Conference Proceedings

Conference proceedings were produced on CD ROM. These were edited by Chris Eames, University of Waikato and published by the New Zealand Association for Cooperative Education.

The proceedings contain 60 fully peer-reviewed papers focusing on aspects of research and the operation of cooperative education programs. Not all authors who presented provided a paper for the proceedings. The CD contains a searchable database where papers can easily be located by author and title.

Copies of the proceedings are available for purchase from Chris Eames. Costs are New Zealand residents NZ$25 per copy, and for overseas residents NZ25 + NZ$10 for postage and secure packaging.