ANDRAGOŠKA SPOZNANJA

Studies in Adult Education and Learning

Vsebina/Contents

Netematski članki/
Open papers

Poročila, odmevi,
ocene/Reports,
Replies, Reviews

Knjižne novosti/
Book Reviews

UVODNIK

UČENJE NA DELU: POVEZOVANJE UČENJA, DELA IN RAZISKOVANJA V ČASU NEGOTOVOSTI

Razmerje med izobraževanjem odraslih in delom je zelo intenzivno in večplastno, saj se večina izobraževanja v odraslosti povezuje z delom. UNESCO (2019) v svojem *Četrtem globalnem poročilu o izobraževanju odraslih* ugotavlja, da je skoraj 75 % izobraževanja odraslih povezanih z delom, medtem ko OECD z raziskavo *Program za mednarodno ocenjevanje kompetenc odraslih* (PIAAC) ocenjuje, da je ta delež še večji in se giblje med 85 % in 95 % (Desjardins, 2020). V evropskem prostoru je tovrstnega izobraževanja po podatkih *Raziskave o izobraževanju odraslih* (Eurostat, 2020) 79,4 %.

Učenje in izobraževanje odraslih v povezavi z delom je predmet obsežnega teoretskega in empiričnega raziskovanja. Raziskovalci proučujejo znanje, spretnosti, kompetence, stališča, vrednote, emocionalne in socialne veščine, praktične modrosti na delu in tudi duhovnost na delu ter etičnost, zanimajo jih strategije učenja in različne ciljne skupine, karierni prehodi in koncepti, kot so delovalnost (ang. *agency*), odprta inovativnost, trajnostnost, dolgotrajna zaposljivost (Alessandrini, 2018). Tudi mednarodne organizacije (npr. OECD, ILO, EU) s strategijami pridobivanja spretnosti za profesionalni razvoj odraslih in projekcijami za napovedi o delu namenjajo temu področju posebno pozornost (gl. Tikkanen, Hovdhaugen in Støren, 2018). V slovenskem okolju se s potrebami po razvoju izobraževanja ukvarja tudi akcijski načrt za dvig produktivnosti ministrstva za gospodarstvo (gl. Domadenik, 2020). Med ključnimi dejavniki za dvig produktivnosti navaja vlaganje v znanje, izobraževanje, usposabljanje tako zaposlenih kot tistih skupin, ki čakajo na delo. Raziskave, ki v središče postavljajo učenje na delu, se ukvarjajo z digitalizacijo in robotizacijo ter učenjem, povezanim s tema procesoma ter pojavom četrte industrijske revolucije, z vprašanji novih kognitivnih in emocionalnih kompetenc ob vrstniškem ali kolegialnem informalnem učenju (gl. Riera Claret, Sahagun in Selva, 2020) pa tudi z vprašanji zlorab in nasilja na delu (Boštjančič, 2019).

Na razvijanje razmerja med učenjem, izobraževanjem, usposabljanjem in delom vplivajo procesi na različnih ravneh: (a) na ravni posameznika npr. življenjski prehodi, osebni razvoj, (b) na ravni organizacije npr. učno okolje, ustvarjanje novega znanja ter (c) na družbenopolitični ravni npr. internacionalizacija, globalizacija, digitalizacija, staranje družbe, migracije (Bohlinger, Haake, Helms Jørgensen, Toiviainen in Wallo, 2015).

Učenje na delu postaja v sodobnosti nujna sestavina dela in lahko pomeni individualen proces, ki poteka kot samostojno učenje, ali skupinski proces, to je kot učenje, ki poteka prek dialoga in sodelovanja med sodelavci ali prek mentorstva v organizaciji, pa tudi kot organizacijsko učenje, to je prek organizacije, ki ima učenje vgrajeno v sisteme, politike, postopke, delovni proces in informacijske sisteme ter organizacijske miselne modele, znanje pa vključeno v izdelke in storitve (Sutherland Olsen in Tikkanen, 2018; Tynjälä, 2013).

V preteklosti je bilo učenje in izobraževanje priprava na delo, delo je sledilo izobraževanju, ki je posameznika usposabljalo za delo; v 80. letih 20. stoletja se vedno bolj izpostavlja tudi pomen učenja na delu (ob tem se seveda učenje in izobraževanje kot priprava na delo ne zanikata), po 90. letih pa največ avtorjev piše o delu in učenju kot prepletenih dejavnostih: učenje je integrirano z delom (npr. Stenström in Tynjälä, 2009; Tynjälä, Stenström in Saarnivaara, 2012). Učenje na delu se začne povezovati tudi z raziskovanjem lastne prakse in razvijanjem novosti, za kar se razvijejo tudi posebne strategije, kakršna je npr. snovalsko razmišljanje (ang. *design thinking*).

Organizirano izobraževanje za delo – formalno in neformalno izobraževanje – ter informalno učenje na delu sta razumljeni kot sistem nenehnega oblikovanja znanja: delo postane okolje formiranja in transformiranja posameznika in skupine. Mreže med učenjem in delom, ki spreminjajo delo in učenje, so implicirane v razmišljanju Gorza, ki je že pred 20 leti pisal o koncu izkoriščevalskega dela (gl. Gorz, 2020). Raziskovalci in menedžerji znanja v podjetjih se sprašujejo, kako povezati delo in informalno učenje. Nameni in rezultati so različni: v nekaterih okoljih podpirajo predvsem povečevanje profita, v drugih primerih razvijajo nove prakse in transformirajo odnose. Nastanejo strategije skupnosti prakse in interesne skupine, v katerih potekata hiter prenos znanja in razvijanje profesionalne identitete ter zavzetosti. Za informalno učenje postaja pomembno načelo povezljivosti. S povezljivostjo označujemo procese, katerih namen je ustvarjati odnose in povezave med različnimi elementi – tudi med različnimi formami znanja – v učnih situacijah, kar se vse združuje v ekosisteme učenja (Nacamulli in Lazazzara, 2019) ali ekologije učenja (Barnett in Jackson, 2019).

V zadnjih 30 letih, odkar poteka poglobljeno raziskovanje učenja na delu, se je zanimanje raziskovalne skupnosti od konceptov, kot so tacitno znanje, učeča se organizacija in menedžment znanja, premaknilo h konceptom, kot so ustvarjalno delo, digitalno učenje na delu, inovativno znanje, praktična modrost, rezilientnost, blaginja na delu (Dhiman, 2020).

Profesionalne prakse se hitro spreminjajo, zato je izziv sodobnih organizacij, kako zaznati in spodbuditi učenje vseh zaposlenih in razvijati kulturo učenja na delu. To pomeni vključevati vse generacije, omogočati medgeneracijski pretok znanja in uporabljati raznovrstne metode (npr. mentorstvo, učenje s posnemanjem, kombinirano učenje, svetovanje, spremljanje, usmerjanje). Pri slednjih Quaglino (2014) in Rago (2010) opisujeta tudi uporabo umetnosti, to je gledališke ter glasbene in filmske metode, v organizaciji, medtem ko Radovan, Kristl in Makovec (2019) opozarjajo na hitro naraščanje števila različnih metod za spletno učenje in povezovanje v virtualnem okolju.

Poseben izziv za učenje na delu kot tudi širše za izobraževanje odraslih danes povzroča aktualna *pandemija COVID-19*, saj so se morale organizacije zelo hitro prilagoditi novim razmeram. Pandemija je ustavila oz. močno prizadela določene sektorje gospodarstva (npr. turizem, transport, naftno industrijo, avtomobilsko industrijo) in celotne izobraževalne sisteme ter sprožila mnogo skrbi, tudi v izobraževanju odraslih (npr. kako zmanjšati socialno neenakost in je ne še povečati ter vključiti odrasle iz ranljivih skupin v izobraževanje na daljavo) (Boeren, Roumell in Roessger, 2020). Poleg tega pa je sprožila tudi veliko učenja na delu ter pospešila rast v določenih sektorjih gospodarstva (npr. informacijska tehnologija, farmacija). V zelo kratkem času od izbruha pandemije so se razvili tudi posebni programi za učenje na daljavo in za delo na daljavo.

V tokratni tematski številki *Andragoških spoznanj*, ki zajema pet člankov, avtorice in avtorji razmišljajo o izzivih učenja in dela z različnih teoretskih zornih kotov in z uporabo različnih raziskovalnih pristopov. Razmerje med učenjem, delom in raziskovanjem proučujejo predvsem na mezo (članki Annabel Jenner, Kristinke Ovesni in Igorja Ivaškovića) in mikro ravni (članek Danijele Blanuša Trošelj, Karle Franković in Milene Valenčič Zuljan ter članek Marjete Šarić).

Annabel Jenner se v članku *Kako lahko individualno učenje na delovnem mestu prispeva k organizacijskemu učenju? O pogojih in omejitvah z vidika izobraževanja odraslih* sprašuje o razmerju med individualnim in organizacijskim učenjem, izhajajoč iz teorije socialnih sistemov. S kvalitativno raziskavo v nemškem okolju, ki je proučevala procese komunikacije, ki pomagajo preoblikovati individualno v organizacijsko učenje, ugotavlja, da prispevek posameznika k organizacijskemu učenju ni odvisen le od procesov učenja, povezanih z delom, ampak tudi od strukturnih razmer na delovnem mestu.

Kristinka Ovesni v članku *Organizacijska klima in z delom povezano izobraževanje zaposlenih: andragoška perspektiva* predstavlja raziskavo o organizacijski klimi in učenju zaposlenih. Po opravljeni empirični raziskavi v Srbiji z uporabo kvantitativnih in kvalitativnih metod prikazuje tri modele organizacijske klime v povezavi z učenjem na delu – organizacijsko ozračje strahu pred represijo, storitveno naravnano organizacijsko ozračje in organizacijsko ozračje, podporno do učenja – in sklene, da je treba spreminjati/razvijati organizacijsko klimo, ki spodbuja učenje, in da je za to treba angažirati andragoge.

Igor Ivašković v članku *Dileme spremljanja učinkovanja načrtovanega učenja na organizacijsko uspešnost* proučuje problematiko spremljanja rezultatov učenja v organizacijskem kontekstu. S podrobno analizo literature razvije sklepe o kompleksnosti, a nujnosti spremljanja učinkov učenja. Avtor ugotavlja, da je pri spremljanju učinkov učenja treba poznati kontekst organizacije, proces načrtovanega učenja in njegove rezultate pa je treba spremljati večdimenzionalno (vključujoč okoljske, organizacijske in individualne dejavnike) ter na več ravneh.

Danijela Blanuša Trošelj, Karla Franković in Milena Valenčič Zuljan so v članku *Vključenost vzgojiteljev predšolskih otrok v informalno učenje kot pomemben dejavnik njihovega profesionalnega razvoja* proučevale vključenost vzgojiteljev v določene oblike

informalnega učenja – prek izmenjave izkušenj in materialov, refleksivne prakse ter uče-nja od drugih – in njihov razmislek o vplivu slednjih na njihov profesionalni razvoj. Na podlagi kvantitativne raziskave, v kateri so sodelovale vzgojiteljice iz Hrvaške, ugotav-ljajo, da so predšolski vzgojitelji najpogosteje vključeni v informalno učenje, ki vklju-čuje dogovor o tem, kako sodelovati s kolegom iz skupine, in dokumentiranje otrokovih dejavnosti.

Marjeta Šarić v članku *Vloga čustev pri učenju na delovnem mestu* prek analize psiho-loške in socialno psihološke literature opredeljuje pomen in vlogo čustev pri učenju na delovnem mestu. V sodobnosti se tudi v delovnem okolju vedno bolj posvečajo pomenu čustev, a težava nastaja, ker so raziskave razdrobljene glede na različna teoretska izho-dišča, ugotavlja avtorica. Na podlagi pregleda literature v prispevku opozarja na pomen čustvenega doživljanja delavcev, ko se učijo na delovnem mestu, ter utemeljuje tezo o pomembni vlogi čustev pri učenju, ki jo velja upoštevati pri spodbujanju kakovostnega učenja na delovnem mestu.

Poleg tematskih člankov pričujoča številka vključuje tudi odprt članek, poročilo, odmev, oceno in tri knjižne recenzije. Barbara Samaluk v članku *Integracija kot večsmerni pro-ces: študija primera inovativnih projektov integracije priseljencev v Sloveniji* proučuje z evropskim denarjem financirane projekte integracije priseljencev, ki so se razvili v Slove-niji, ter ugotavlja, da projekte vzpostavljajo proaktivni aktivisti s pomočjo sredstev EU z namenom profesionalizacije aktivnosti in vzpostavljanja partnerstev za razvoj povezanih in medresorskih storitev, ki izhajajo iz potreb priseljencev in so namenjene njihovemu opolnomočenju ter vzpostavljanju profesionalnih norm in standardov za integracijo mi-grantov. V poročilu *Podpora mentorjem pri praktičnem usposabljanju vajencev* Tina Kla-rič predstavlja, kako se znotraj vajeništva, ki v poklicnem izobraževanju teče kot poskus, na delu učijo in usposabljajo vajenci, ki se pripravljajo na opravljanje poklica, ter kako ob tem metodično podpreti mentorje v podjetjih. Anja Benko v odmevu *Izobraževanje odraslih praznuje okrogle jubileje in prejema priznanja* piše o priznanju, ki ga je Javni zavod Cene Štupar prejel od Mestne občine Ljubljana. Barbara Šteh daje oceno doktorske disertacije Adrijane Bibe Rebolj z naslovom *Prilagoditve za študente s posebnimi potre-bami pri doseganju zahtevanih akademskih standardov*. Številko zaključujejo tri recenzije knjig: *Inequality, Innovation and Reform in Higher Education: Challenges of Migration and Ageing Populations*, ki jo je pripravila Klara Kožar Rosulnik, *Design Thinking Rese-arch: Investigating Design Team Performance*, ki jo je pripravil Jurij Ličen, ter *E-izobra-ževanje za digitalno družbo*, ki jo je pripravila Tanja Urbančič.

Nives Ličen, Danijela Makovec in Borut Mikulec

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EDITORIAL

WORKPLACE LEARNING: LEARNING, WORK, AND RESEARCH IN A TIME OF UNCERTAINTY

As most learning in adulthood is linked with work, the relationship between adult education and work is very intense and multi-layered. UNESCO's *4th Global Report on Adult Learning and Education* (2019) found that nearly 75% of adult education is work-related, and OECD's research as part of the *Programme for the International Assessment of Adult Competencies* (PIAAC) estimates that this percentage is even higher, between 85% and 95% (Desjardins, 2020). According to the *Adult Education Survey* (Eurostat 2020), in Europe this type of education is at 79.4%.

Work-related learning and adult education have been a subject of extensive theoretical discussion and empirical research. Researchers have been examining work-related knowledge, expertise, competencies, points of view, values, emotional and social skills, practical wisdom, workplace spirituality, and ethics; they are interested in learning strategies and different target groups, career transitions as well as concepts such as agency, open innovation, sustainability, and long-term employability (Alessandrini, 2018). International organisations (OECD, ILO, EU) have also been paying particular attention to work-related learning with strategies for professional skills development and projections about work in the future (cf. Tikkanen, Hovdhaugen, & Støren, 2018). In Slovenia the needs that arise from the development of education are also dealt with by the Ministry of Economic Development and Technology's action plan to increase productivity (cf. Domadenik, 2020). It lists investing in knowledge, education, and training of both employees and those waiting for work among the key factors of increasing productivity. Researchers who focus on workplace learning deal with digitalisation and robotisation as well as learning connected with these two processes; they also explore the fourth industrial revolution and questions about new cognitive and emotional competencies involved in peer learning (cf. Riera Claret, Sahagun, & Selva, 2020) as well as questions of abuse and workplace bullying (Boštjančič, 2019).

The relationship between learning, education, training and work is influenced on various levels: (a) at the level of the individual, e.g., by life transitions and personal development, (b) at the level of the organisation, e.g., by the learning environment and creation of new knowledge, and (c) at the socio-political level, e.g., by internationalisation, globalisation,

digitalisation, societal ageing, and migration (Bohlinger, Haake, Helms Jørgensen, Toiviainen, & Wallo, 2015).

Workplace learning is now becoming a necessary component of work and can signify an individual process that occurs as individual learning, or a group process that happens through dialogue and cooperation among co-workers or in the form of mentorships in an organisation, as well as organisational learning, i.e., where learning is built into the organisation's systems, policies, procedures, work process and information systems as well as the organisational thought models, and this knowledge is incorporated into products and services (Sutherland Olsen, & Tikkanen, 2018; Tynjälä, 2013).

In the past learning and education were seen as preparation for work, work came after education, which prepared the individual for work. In the 1980s workplace learning became increasingly important (of course not negating the importance of learning and education as preparation for work), and since the 1990s more and more authors have been writing about work and learning as two activities that are intertwined: learning and work are integrated (npr. Stenström & Tynjälä, 2009; Tynjälä, Stenström, & Saarnivaara, 2012). Workplace learning also begins integrating with research of its own practice and introducing innovations, which also include special strategies such as design thinking.

Organised education for work – both formal and nonformal education – as well as informal workplace learning are seen as a system of constant knowledge formation: work becomes the environment where the individual and the group are formed and transformed. The networks between learning and work that change both work and learning are implied in Gorz's thoughts on the end of exploitative labour (cf. Gorz, 2020). Researchers and knowledge managers are trying to find ways to connect work and informal learning. The purpose behind this and the results vary: in certain environments they predominantly support increased profit, in other examples they develop new practices and transform relationships. Communities of practice and interest groups are created, with quick transfer of knowledge and the development of professional identity and commitment. Connectivity is gaining more and more importance in informal learning. It refers to the processes aimed at creating relationships and connections among various elements – including different forms of knowledge – in learning situations, which brings everything together into ecosystems of learning (Nacamulli & Lazazzara, 2019) or ecologies for learning (Barnett & Jackson, 2019).

In the last 30 years, since more in-depth research of workplace learning has been happening, the interest of the research community in concepts such as tacit knowledge, learning organisation, and knowledge management has shifted toward concepts such as creative knowledge work, digital workplace learning, innovative knowledge, practical wisdom, resilience, and workplace well-being (Dhiman, 2020).

Professional practices are changing rapidly, so it is a challenge to modern organisations to perceive and encourage the learning of its employees and develop a culture of workplace learning. This means involving all generations, enabling intergenerational knowledge transfer, and using various methods (e.g. mentorship, learning through mimicking,

combined learning, advising, monitoring, guidance). Concerning the latter, Quaglino (2014) and Rago (2010) also describe using art (theatre, music or film methods) in an organisation, while Radovan, Kristl and Makovec (2019) point out the rapidly increasing number of different methods of online learning and connecting in a virtual environment.

A challenge of workplace learning in particular and adult education in general is today posed by the *COVID-19 pandemic*. Organisations have had to adapt to new circumstances very quickly. The pandemic has deeply affected or even brought to a halt certain economic sectors (e.g. tourism, transport, the oil and automotive industries) and entire educational systems; it has sparked many concerns, including in adult education (e.g. how to decrease social inequalities and not increase them and include adults from vulnerable groups into distance learning) (Boeren, Roumell, & Roessger, 2020). It has also triggered a lot of workplace learning and precipitated growth in certain economic sectors (e.g. information technology, pharmacy). In the very short time since its outbreak, the pandemic has led to the development of special programs for distance learning and working from home as well.

This thematic edition of *Studies in Adult Education and Learning* encompasses five articles in which the authors reflect on the challenges of learning and working from various theoretic perspectives and by using diverse research approaches. The relationships between learning, work and research are studied predominantly on the meso (articles by Annabel Jenner, Kristinka Ovesni, and Igor Ivašković) and micro levels (articles by Danijela Blanuša Trošelj, Karla Franković, Milena Valenčič Zuljan, and Marjeta Šarić).

Annabel Jenner's article, *How Can Individual Learning at the Workplace Contribute to Organisational Learning? An Adult Education Perspective on Requirements and Boundaries*, explores the relationship between individual and organisational learning, stemming from social systems theory. Her qualitative research set in Germany studies the processes of communication that help transform individual into organisational learning. She has found that the individual's contribution to organisational learning does not depend only on the processes of learning connected to work but also to structural conditions in the workplace.

Kristinka Ovesni's *Organisational Climate and the Work-Related Learning of Employees: An Andragogical Perspective* presents research on organisational climate and employee learning. After conducting an empirical study in Serbia by using both quantitative and qualitative methods, Ovesni presents three models of organisational climate related to workplace learning – the organisational climate of fear of repression, the service-oriented organisational climate, and the organisational climate that is supportive of learning. She comes to the conclusion that an organisational climate that encourages learning needs to be developed and that andragogues need to be engaged in this work.

Igor Ivanšković's article, *The Dilemmas of Monitoring the Effects Learning Has on Organisational Performance*, studies the issues of monitoring the results of learning in the organisational context. A detailed analysis of the literature leads to findings on the complexity and the necessity of monitoring the effects of learning. The author finds that

monitoring learning requires knowledge of the organisational context, while the process of planned learning and its results need to be monitored in a multi-dimensional way (including environmental, organisational, and individual factors) and on multiple levels.

In *Preschool Teachers' Involvement in Informal Learning as an Important Factor of Their Professional Development,* Danijela Blanuša Trošelj, Karla Franković, and Milena Valenčič Zuljan look at preschool teachers' involvement into certain forms of informal learning – by sharing experiences and materials, reflective practices, and learning from others – and how these influence preschool teachers' professional development. Preschool teachers from Croatia participated in quantitative research which finds that preschool teachers most often participate in informal learning, which includes arrangements about how to work with colleagues from the group and document the children's activities.

Marjeta Šarić's article, entitled *The Role of Emotions in Workplace Learning*, analyses the psychological and social psychological literature to define the meaning and role emotions play in workplace learning. Nowadays, we are paying more and more attention to the meaning of emotions in the workplace, even though the author finds that research is fragmented due to various theoretical starting points. Based on a review of the literature, she points out the significance the emotional experiences of employees have during workplace learning and argues that the important role emotions play in learning needs to be kept in mind when encouraging workplace learning.

Along with the thematic articles the issue also includes an open article, a report, a reply, a review, and three book reviews. Barbara Samaluk's *Integration as a Multi-Way Process: A Case Study of Innovative Migrant Integration Projects in Slovenia* finds that these projects are set up by proactive activists with the help of EU funds for the purpose of professionalising the activity and establishing partnerships and networks to develop needs-based, cross-sectional services that empower migrants and establish professional norms and standards for migrant integration. In her report on *Supporting Mentors during the Practical Training of Apprentices* Tina Klarič focuses on apprenticeships, which are being conducted as an experiment in vocational education, and where apprentices are learning and training for a specific profession, and on how to methodically support the mentors. Anja Benko's reply, *Adult Education Celebrates Jubilees and Receives Recognition*, is on the award that the Ljubljana Public Education Centre – Cene Štupar received from the Municipality of Ljubljana. Barbara Šteh reviews Adrijana Biba Rebolj's doctoral thesis, *Adjustments for Students with Special Needs in Achieving the Required Academic Standards,* and the final three contributions are book reviews: Klara Kožar Rosulnik focuses on *Inequality, Innovation and Reform in Higher Education: Challenges of Migration and Ageing Populations*, Jurij Ličen tackles *Design Thinking Research: Investigating Design Team Performance*, and finally, Tanja Urbančič reviews *E-Education for a Digital Society*.

Nives Ličen, Danijela Makovec, and Borut Mikulec

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Annabel Jenner

HOW CAN INDIVIDUAL LEARNING AT THE WORKPLACE CONTRIBUTE TO ORGANISATIONAL LEARNING? AN ADULT EDUCATION PERSPECTIVE ON REQUIREMENTS AND BOUNDARIES

ABSTRACT

The paper discusses the relationship of individual learning at the workplace and organisational learning from the perspective of adult education research. It asks which processes are required for individual learning to contribute to organisational learning and considers boundaries against change triggered by the organisations' members. This question is discussed by focussing on a recent empirical study, which outlines processes of communication that help to transform individual into organisational learning. These processes are analysed within the context of inter-organisational cooperation, taking up a topical challenge in adult and continuing education in Germany. The study draws on Social Systems Theory; its methodological design comprises qualitative case studies. The empirical results differentiate organisational learning as a multi-faceted concept that encompasses change and highlights how organisations develop processes to prevent being induced towards organisational learning by their members. The paper discusses these findings with regard to the demands lifelong learning faces in the workplace.

Keywords: *adult education, organisational learning, workplace learning, individual learning, social systems theory*

KAKO LAHKO INDIVIDUALNO UČENJE NA DELOVNEM MESTU PRISPEVA K ORGANI-ZACIJSKEMU UČENJU? O POGOJIH IN OMEJITVAH Z VIDIKA IZOBRAŽEVANJA OD-RASLIH – POVZETEK

V članku razpravljamo o razmerju med individualnim učenjem na delovnem mestu in organizacijskim učenjem z vidika izobraževanja odraslih. Ukvarjamo se s procesi, ki so potrebni, da učenje posameznika prispeva k organizacijskemu učenju, hkrati pa obravnavamo tudi omejitve, ki jih proti spremembam

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vzpostavljajo člani organizacij. Na to vprašanje se odzivamo na podlagi nedavne empirične študije o komunikacijskih procesih, ki omogočajo prehod od individualnega k organizacijskemu učenju. Ti procesi so analizirani v kontekstu medorganizacijskega sodelovanja, aktualne teme izobraževanja odraslih in nadaljnjega izobraževanja v Nemčiji. Študija se naslanja na teorijo socialnih sistemov; njen metodološki okvir je sestavljen iz kvalitativnih študij primerov. Empirični rezultati razkrivajo organizacijsko učenje kot večplasten pojem, ki vključuje spremembo, in poudarjajo, kako organizacije razvijejo procese, s katerimi preprečujejo, da bi jih njihovi člani prisilili v organizacijsko učenje. V razpravi o teh ugotovitvah upoštevamo izzive, s katerimi se pri vseživljenjskem učenju srečujejo na delovnih mestih.

Ključne besede: *izobraževanje odraslih, organizacijsko učenje, učenje na delovnem mestu, individualno učenje, teorija socialnih sistemov*

INTRODUCTION

During recent years there has been increased interest in organisational questions concerning adult education (AE) within the German research debate. While organisational issues were once regarded as marginal to the supposed core interest in learning and teaching (critically: Terhart, 1986), today they are seen as critical for a comprehensive understanding of AE (Schemmann, 2015). Moreover, for organisations, keeping pace with societal changes is a challenge. These societal changes include, for example, global demands accompanied by local responsibilities, the increase of digitalisation, and new ways of working under the current COVID-19 pandemic. Emphasizing the organisational level has led to a strong focus on organisational learning in AE research. When addressing organisational learning, it is striking that the relationship between *the individuals of a working environment* and *the organisation itself* forms a pivotal point. The individual is discussed as an agent of organisational learning (Friedman, 2001), provoking research on aspects of the relation between individual and organisational learning. However, explanations for this relation are ambiguous. For example, Elkjaer and Wahlgren (2006) point out that "it is difficult to avoid a starting point for learning that begins with individuals' learning in organizations" (p. 16) when trying to grasp organisational learning as a self-owned process and level. Referring to the work of Elkjaer and Wahlgren (2006), Döös, Johansson and Wilhelmson (2014) also address the problem of understanding organisational learning as solely aggregated individual learning. They propose an analogy that considers different learning subjects, contents, and processes for both individual and organisational learning and relate them to each other. From the perspective of AE research, this topic continues to have a lasting presence in international discourse (e.g. Elkjaer, 2017), showing that further insights into the interlinkage of individual and organisational learning remain a current issue. A particular problem lies in explaining learning at an organisation's social level if organisational learning is understood as being clearly distinguished from individual learning by the organisation's members (Kuper, 1997, p. 141; Göhlich, 2009, p. 29).

These considerations highlight the need to further analyse the role played by individual learning at the workplace in stimulating learning at the organisational level.[1] This approach widens the understanding of workplace learning (WPL) as employees' continuous learning by also considering "the influence of the organisational and wider institutional context in which learning at work occurs" (Fuller & Unwin 2004, p. 133). Thus, this perspective directs our attention to structural conditions.

This paper discusses how individual learning contributes to organisational learning by drawing on a qualitative empirical study (Jenner, 2018) that explores this matter within the context of cooperative activities among AE providers. As explained below, this context has proven suitable for exploring the contribution of individual learning to organisational learning due to the specific structural characteristics of inter-organisational cooperation (Jenner, 2015). In recent years cooperative activities have become necessary for organisations in adult and continuing education in Germany and have been fostered by various publicly funded schemes (Alke & Jütte, 2016). Cooperative activities facilitate lifelong learning opportunities, e.g., by pooling resources, reaching new target groups, and jointly developing new course offers and projects (Alke & Jütte, 2016, p. 2). These activities aim at offering people wider opportunities to engage in lifelong learning within their region, thus increasing local participation (for the international discussion: Evans, 2019). Assuming cooperative activities lead to developmental processes within the involved organisations, cooperation is regarded as a challenge and therefore a cause for organisational learning (Feld, 2011). However, according to Kämper and Schmidt (2000), the structural conditions of inter-organisational cooperation reveal that it mainly depends on the *single members* of each organisation who deal with cooperative challenges. Usually, a single person is in charge of cooperative activities. This person represents the home organisation and interacts with members from partner organisations, thus taking a key-position. Consequently, challenges occurring within cooperative activities can only be dealt with in the corresponding home organisations if the members play them back (Kämper & Schmidt, 2000). Therefore, challenges arising from cooperative activities occur initially for the organisations' members and, in dealing with them, can create a need for individual learning. Organisational learning remains dependent on whether the challenges dealt with by the cooperating person are also introduced back into the home organisation and become a matter for internal negotiation. Against this background, the study focusses on inter-organisational cooperation as an empirical setting that allows for the systematic differentiation between *the individual's work-related learning processes within cooperative activities outside the home organisation* and the requirements necessary to stimulate *organisational learning inside the home organisation*.

By drawing on this empirical study (Jenner, 2018), the paper discusses how individual learning in cooperative contexts can raise matters that are relevant for the organisation,

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1 Individual and organisational learning are developed as key concepts in the theoretical section.

thus prompting the organisation to process these as triggers and initiate organisational learning at a structural level. Also, the findings reveal processes through which the organisation brushes off and demarcates triggers inducing change. The paper focusses on these phenomena by addressing the question as to which processes are necessary for organisations to either *take up* or *brush off* triggers that individual learning offers to stimulate organisational learning. This question is discussed considering both the requirements as well as boundaries regarding the impact of individual learning in the workplace on organisational learning.

THEORETICAL FRAMEWORK

This section outlines the study's theoretical framework (Jenner, 2018, cf. preliminary work Jenner, 2015). It has been developed from German sociologist Niklas Luhmann's Social Systems Theory, especially considering his work on organisations (Luhmann, 2011). By focussing exclusively on communication, Luhmann's perspective distinguishes between organisations as social communication systems and their members, who participate in the communication system but are not considered part of it. Here, this analytical differentiation is seen as a theoretical surplus for investigating the relation of individual and organisational learning because it does not run the risk of mingling the two.

Thereby, organisations are understood as social systems that constitute themselves "as a nexus of *communications* referring to each other and differentiating themselves from an *environment*" (Becker & Haunschild, 2003, p. 715; original italics). While most other theories seeking to explain social processes focus on *actions*, Social Systems Theory focusses on *communication*. Luhmann (2011) argues that communication, unlike action, includes at least two individuals and therefore allows for the explaining of social coordination. Communication is understood in a self-referential (autopoietic) manner, meaning only communication can produce communication and therefore creates the above-mentioned boundary separating it from its environment (Luhmann, 2011).[2] Luhmann (2011) considers organisations as specific social systems and the form of communication essential for organisations is the *communication of decisions*. However, this "does not imply that all communications occurring in organizations are decisions, but that all important, *decisive* communications crucial for organizations are in the shape of decisions" (Becker & Haunschild, 2003, p. 725, Note 4; original italics). Due to focussing *exclusively* on decisive communication, Luhmann (2011) does not conceptualise the individual as part of the organisation. Rather, he analyses the individual as part of the organisation's environment. In Luhmann's understanding, the individual gains relevance for the organisation solely by actively participating in organisational

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2 Through this lens, communication is not limited to verbal communication. It is defined as "the synthesis of three selections: *information* (what is communicated), *utterance* (how and why it is communicated) and *understanding* (the distinction between utterance and information). Communication as this *unity* of the three selections is an emergent phenomenon that is not attributable to a single individual: it presupposes at least two individuals" (Seidl, 2005a, p. 405; original italics).

decision-making communication.[3] Seidl (2005b) makes clear this perspective does not imply a less important role of the individual than in other theories. Referring to organisations and individuals as different systems, Seidl states that "[o]n the contrary, through this differentiation it can be clearly shown that, and in what way, both types of systems *depend* on each other" (p. 33; original italics). This approach thus does not question the relevance of, e.g., norms, beliefs, perceptions or social practices of human beings in their working environment, but it analytically grasps them only as far as they contribute to organisational decision-making communication.

Social Systems Theory understands *learning* as an internally structured way in which a system deals with triggers occurring in its environment (Kuper, 2010, p. 348). This refers to the idea that systems are operationally closed and have a self-referential way of functioning (Luhmann, 2011, pp. 51–52). Triggers occurring in a system's environment do not enter the system, but rather, the system deals with them according to its specific way of functioning. In the case of *individual learning,* this means individuals deal with triggers based on their consciousness (Esposito, 2015). They experience triggers when their understanding reaches a limit (Schäffter, 1997, p. 695), such as when something new, problematic or challenging causes constraints in one's current understanding. Schäffter (1997, p. 696) points out this can induce individual learning because disturbances in understanding have the potential to cause reflection and to change pre-existing latent assumptions. For example, if a person who feels insecure in cooperating with partners who are also competitors develops strategies to handle the simultaneity of cooperation and competition, the person thereby overcomes the experienced constraint. Consequently, individual learning is defined as an ascription for overcoming constraints in understanding by developing ways to resolve what initially occurs as a limitation to previous understanding.

Turning to a definition of *organisational learning*, the internally structured way in which an organisation deals with triggers in its environment is based on decisive communication (Luhmann, 2011). However, Luhmann (1992, pp. 168–169) stresses that a decision is a single momentary occurrence that does not outlast time, thus it cannot be changed.[4] He argues, though, that there is a certain type of decision in organisations that is lasting: so-called *decision premises*. Becker and Haunschild (2003) explain: "Decision premises are structural limitations of possible decisions that are taken for granted when decision-making situations occur" (p. 718). These premises endure over time because they form a kind of guiding lane for making momentary decisions in line with organisational expectations. Hence, decision premises function as orienting structures within an organisation (Luhmann, 1992, p. 172). Changes are possible because decision premises, unlike momentary

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3   Luhmann uses the term *person* when social communication systems refer to an individual (see in detail: Seidl 2005b).

4   Whilst everyday understanding implies decisions can be changed, Luhmann (1992, pp. 169–170) refers to the temporal dimension of a decision being a momentary occurrence that cannot be changed because it does not outlast time. In his temporal understanding only following new decisions can bring change to something subject to a former decision.

decisions, outlast time. Change occurs when triggers in the environment cause organisational decisions to be made in a different way and when these variations in decision-making ensure that future decisions are also made in a new way, i.e., become established as decision premises (Luhmann, 2011, p. 352). Consequently, organisational learning is understood at a *structural* level as when the organisation's decision premises change. This concerns not only formal but also informal structures, e.g., when people in a workplace establish routines and these become expected and orienting, thus taking over the function of a decision premise (Kühl, 2011). An example of this is if members of a university's sub-unit observe unclear regulations for recognising results from exams students have taken abroad and then develop strategies that finally become an accepted and expected procedure throughout the sub-unit, i.e., take over the function of decision premises.

Consequently, the first prerequisite for individual learning to contribute to organisational learning concerns whether it gains relevance *within organisational communication*. Individual learning is not a matter for the organisation per se, bearing in mind that Social Systems Theory considers individuals' potentials as remaining invisible for the organisation as long as they do not become a matter within organisational communication (Simon, 2007, p. 41). Social Systems Theory understands the relation between an individual and an organisation as a so-called *irritation*, meaning

> the systems influence one another, but there is no transfer of information from one system into another. Occurrences in their respective environments have the quality of an amorphous noise, from which systems can gain information according to their own, self-made internal facilities for interpretation. (Becker & Haunschild, 2003, p. 715)

Obviously, learning cannot be passed on. This implies empirically considering how occurrences for individual learning, as well as developed knowledge or experience on behalf of the individuals, raises matters within organisational communication.[5]

However, once issues have become a matter within organisational communication, they do not automatically trigger organisational learning. Rather, the issues can fade without causing organisational processing. According to the outlined understanding of organisational learning, it is also crucial whether issues are further processed within the organisation and lead to decisions that differ from the usual organisational decision-making. If these variations occur *and* prevail as a premise for further decisions, i.e., constitute a variation of the current structures, organisational learning takes place.

To further clarify these relations calls for empirical exploration. For the empirical analysis focussing on inter-organisational cooperation, these considerations imply three perspectives:

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5   Seitter and Kade (2009, p. 137) state that, from this perspective, individual experience only becomes apparent in organisations through communication of knowledge regarding experience. This understanding is not limited to thematising experience, it also becomes perceivable for organisations when members come up with ideas etc. based on their experience or perform accordingly so their experience can be referred to.

- Which occurrences for individual work-related learning coincide with cooperative tasks, i.e., which challenges, problems, new situations, etc. does the cooperating person face and how does he/she deal with them in terms of individual learning?
- How are occurrences for learning introduced to the home organisation, i.e., (how) do these challenges, or the individual's strategies in overcoming them by learning, become an issue within organisational communication and how are they further processed?
- How can the according organisational communication lead to variations in organisational decision-making? Do these variations induce pre-existing decision premises to change, bringing about organisational learning?

Comprising these perspectives, the study's overall research interest asked which communication processes enable individual learning in the context of cooperation to be transformed into organisational learning. The analytical focus is on the "intersection" (metaphorically speaking) between the person in charge of cooperating outside the home organisation and ways in which issues relevant for individual learning are introduced and processed within the home organisation. As discussed in the conclusion, tracing how individual learning becomes a matter within organisational communication and decision-making is essential for subsequently specifying further conditions relevant for inducing change.

METHODS

The qualitative study (Jenner, 2018) is based on interviews collected in a case-related design. A case was analytically defined as the above-mentioned "intersection": Each case considered an organisational member in charge of a specific cooperation activity, exploring this key person's perspective on the cooperative activity, considering cooperative situations calling for individual learning as well as analysing how the key person deals with such occurrences and introduces them to the home organisation. Furthermore, to include an exemplary inner-organisational perspective, each case considered an additional member of the home organisation to understand what goes on at the "intersection" from an internal, complementary perspective. Although single perspectives do not provide insight into overall organisational processes, this design sheds light on how occurrences for individual learning are introduced to the home organisation and how they are processed as potential triggers for organisational learning. The "intersection" cases were chosen within a regional network consisting primarily of different organisations within the field of continuing education, vocational education and training, and regional companies. To explore the connecting lines between the key person's cooperative activities and processes inside the home organisation, it was necessary to collect explicit problem-focussed narrations. Thus, fourteen qualitative guideline-based, problem-focussed interviews (Witzel, 2000) were performed (average duration: 84 minutes). They were audio-recorded, transcribed, and analysed in a first exploratory approach of initial text work (Kuckartz, 2012).

In a next step, the insights from the exploratory analysis were considered for concretising the theoretical premises. Thus, a concept for analysis was developed, detailing which aspects needed to be considered to explore how individual learning can trigger organisational communication and decision-making. Additionally, the first exploratory analysis revealed that in-depth case analysis was required to grasp internal organisational processes. This led to selecting two cases for in-depth study. They were sampled within the collected empirical material according to the criterion of "intensity sampling" as suggested by Patton (1990, pp. 171–172). This meant selecting cases based on their richness concerning the research question. The first case was selected due to its high illustrative eligibility; the second was chosen based on its potential for contrasting and differentiating the results of the prior case.[6] These two cases built the centrepiece of the reported study.

Both cases were analysed in-depth, in total comprising four interviews (two per case) and 138 pages of transcription. The analysis was carried out by thematically structuring the transcripts through coding and categorisation (Kuckartz, 2012) using qualitative analysis software (MAXQDA). Three main perspectives guided this structuring: first, learning occurrences for the employees involved in cooperation and their strategies to deal with them; second, the ways in which these occurrences are introduced and processed in the home organisation; third, occasions inside the home organisation which prepare cooperative activities. The third perspective emerged from the initial exploratory analysis. It shows how the key person's participation in cooperation is brought in line with the organisation's expectations prior to cooperative activities. Structuring the empirical material along these three perspectives built a foundation upon which the "intersections" could then be carved out in a reconstructive approach. Both interviews belonging to an "intersection" were analysed together, investigating the interview passages assigned to each of the above-mentioned perspectives. These passages were analysed with respect to the theoretical perspective, i.e., *the emergence of organisational communication referring to the individual's work-related learning in the context of cooperative tasks*, connections to *organisational decision-making*, and the *formation of decision premises*. Thus, organisational learning related to individual learning became comprehensible by tracing triggers introduced to the home organisation, considering relations and contrasts in the narrations of the interviewees belonging to one "intersection". In addition, studying semantic distinctions within the interviewee's narrations enabled insights into the characteristic distinctions expressed as patterns that guide the organisation's decision-making (Besio & Pronzini, 2010, p. 8).

EMPIRICAL FINDINGS

This section outlines selected key findings from the two previously specified case studies (Jenner, 2018). The findings are split into three sections. First, communicative processes used for individual learning to trigger organisational decision-making. Second, strategies

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6   A case-related design limits empirical generalisation, which affords further comparative analysis. However, the design allows insights into genuine social structures through in-depth exploration, enabling their abstracted theoretical generalisation (Terhart, 1985, pp. 301–303).

the organisation uses to process triggers but deals with them in a way that avoids organisational learning. Third, conclusions regarding communicative processes essential for organisations in deciding whether to take up or reject triggers brought along by work-related learning.[7]

Taking up Triggers from Individual Learning

The first case comprises, on the one hand, an employee who has a leadership role and is engaged in inter-organisational cooperation, representing the home organisation as a key person. On the other hand, is the key person's superior, who is the general manager. The general manager is not directly involved in the cooperative activities, but has touching points, e.g., when there is a need to discuss cooperation strategies. The organisation aims to contribute to common welfare by offering vocational continuing education alongside a range of other services. The cooperation takes place with other local partners engaged in continuing education and vocational education and training. The organisation and local partners share an interest in working together on a project to offer services and products for personnel issues to regional businesses. The findings are presented alongside the three perspectives introduced previously.

Individual Learning Within the Cooperation

Different challenges calling for individual learning within the key person's cooperative activities are apparent. These challenges result from new situations the key person faces such as social interactions and cooperation with partners who may in other contexts be competitors:

> Yes, at first this was a very unfamiliar cooperation, I had not experienced it in this way before. Providers now work on a project together but, at the same time, are also competitors in the market. (Key person, case 1)

In addition, new situations arise while working on new topics, jointly developing new ideas, or opening up a new field of joint engagement. The challenges become apparent when, for example, the key person describes that visiting regional businesses as potential customers means to

> enter a totally different culture. So that means I definitely need an antenna for it, a feeling for the existence of cultural differences. I would say it requires developing a certain intercultural competence. That starts with the way of dressing […], the language is a different kind. (Key person, case 1)

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7 Quotations from the empirical material have an illustrating function. However, identifying patterns within the organisational communication required analysis throughout the transcripts, i.e. it was not until several empirical passages of the kind displayed were analysed that patterns became comprehensible. Quotations are translated from German (Jenner, 2018), giving transfer of meaning preference over literal translation (excluding non-verbal elements and stumbling parts). Omissions are marked as […].

This example highlights that the key person needs to develop strategies to find her way around the businesses. Several similar incidents demonstrate the key person seeks connectivity to the new context by developing strategies to handle challenges. This allows her to bridge the differences between the home organisation and the unfamiliar, external working context. Thus, individually learning how to overcome constraints that occur when approaching the new context serves as a strategy to mediate between the home organisation and the new setting. By developing expertise in the cooperative context, the key person opens up a field of action that she can introduce back to the home organisation.

Introducing Learning Occurrences to the Home Organisation

When turning to the question as to how learning issues are introduced and become a matter within the organisational communication, a multi-step process is identified: the *initial mode* is concerned with whether learning occurrences actually become a matter within organisational communication. For example, the key person describes how she informs others in her home organisation about cooperation topics:

> Yes, well on the one hand, I also reported about this issue in the intranet. Then I distributed these brochures, […], I spread them within our organisation and also talked about these project activities in team meetings. […]. And I involved more than one colleague. (Key person, case 1)

Whilst these issues are not necessarily subject to subsequent processing, further findings reveal how a *second mode* of communicative activities can lead to matters being followed up within the organisation. This second mode concerns augmenting resonance for issues once they have been introduced to the organisation. The following example, taken from the general manager's interview, highlights strategies regarding a service product the key person has developed within the cooperation:

> And we also consider […] how can we proceed with this? What can be placed in the market if we move within this field in this project. And we also look at the results afterwards, does this project result help us now […]. Or does it possibly just help us as a reference to show that we have engaged in such matters, so that we can use it as an additional entry ticket for the businesses, to show we know our way around […] because we have already engaged in projects in this context. Or does it help us to open up new funding opportunities in this area? (General manager, case 1)

Besides illustrating that further resonance for the key person's cooperative matters occurs, the example reveals a pattern: Triggers deriving from the key person's cooperative activities are *analysed* regarding their future potential (how can we proceed?). These triggers are *rated* (does it help us?). Finally, they are taken into account to *decide* on further

action to follow up on an estimated potential (should the product be brought to market, used as a reference to win customers, or to apply for funding?). This multi-step process shows how potential triggers for organisational learning are woven deeper into the organisational communication. The process elaborates the potential triggers and opens them up to organisational decision-making regarding future actions. Furthermore, according processes only partially take place with intent; rather they appear as a continuous latent pattern within the interviews. This way of processing triggers highlights how the organisation prepares the ground for considering them in its decision-making. Based on the key person's work-related experience in the new field of action, the sequence of *analysing*, *rating* and *decision-making* can take place within the organisation.

Finally, a *third mode* of communicative processes highlights the emergence of potential changes in the organisation's decision structures. Structuring premises appear by considering which distinctions the interviewees use. One central premise that guides organisational decision-making in this case is, for example, the self-observing use of the distinction *better* versus *worse*. Interestingly, this distinction is relevant for organisational decisions regarding *quality development*. The interview with the general manager reveals comparisons between the home organisation and the cooperating partner organisations:

> Firstly, through cooperation you learn to pamper your own vanity. […] When you see something is going well here […]. Then we are on an obviously correct path. […] Second, there are areas in which others simply are better. […] At least withdrawal provokes a decision – do we want to get better in this area, too. And if so, how does that work? Can we copy it? Or should we acknowledge they can do it far better, couldn't we generally buy it in from them before we nearly kill ourselves to do something as well as someone else […]. So it can indeed lead to acknowledging they can do it better. […] But we don't just accept "they are better at it", rather it goes along with the question, can it help us somehow? (General manager, case 1)

The comparison provokes decisions: either it confirms the organisation's success, thus highlighting the efficacy of existing structures, or leads to decisions as to how the organisation should consider different possibilities to improve its strategy. These questions prompt organisational decision-making regarding the organisation's quality. The arising decisions guide what happens subsequently, thus having the potential to serve as decision premises, and therefore to bring about organisational learning. Also, the distinction (*better* versus *worse*) guides how organisational decisions should be made with respect to comparisons between the home organisation and the cooperating partners. Therefore, the distinction itself reveals a structure the organisation already makes use of for checking its quality. This structure demonstrates that challenges arising from cooperation have previously been considered within the organisational decision premises. Here, organisational learning appears in retrospect as the premise mirrors already familiar challenges.

Preparing for Cooperative Activities

The third perspective describes situations that *prepare* the key person's external cooperative activities. For example, the key person and the general manager connect when an upcoming meeting with the cooperation partners requires the key person to represent the home organisation's position regarding negotiated matters. These preparatory situations reflect the organisation's leading distinctions by clarifying how the key person should perform in line with organisational expectations. For example, the distinction *better* versus *worse* is latently present in the expectation to avoid a disadvantageous position compared to partner organisations. The general manager explains he expects the key person to balance between either contributing to the cooperation, or defending the home organisation's position towards the partners by considering "how much is it still wanted that we contribute or do we have to start biting at some point too" (General manager, case 1).

Both interviewees report that expectations as described in this example are thematised when discussing cooperation strategies. While the organisation cannot influence the key person's external cooperative activities directly, clarifying the organisation's guiding decision premises prepares the key person to perform in a way the organisation approves. Here again, organisational learning shows in retrospect because decision premises appear that refer to cooperative challenges and, thus, demonstrate the organisation's familiarity with orienting employees accordingly. Dealing with triggering situations leads to these premises being revived when preparing the key person for future situations.

So far the results show how learning occurrences experienced by the key person are woven into the organisational communication and are processed in a way that opens them up for organisational decision-making, i.e., preparing organisational learning or displaying it in retrospect.

Brushing off Triggers that Derive from Individual Learning

This section draws on selected key findings from the second case study. It is similar to the first case study in that it concerns an intersection between a key person involved in cooperative activities and a representative of the home organisation who is at the same time the general manager. The key person continuously initiates occasions for organisational learning, but here they are rejected by the organisation.

The key person is responsible for the home organisation's strategic project activities. While the organisation is located in the field of initial and continuing vocational education and training, the key person's cooperative activities require mixing with local companies. Moreover, the cooperative activities are beneficial in a number of ways and help attain multiple goals. They include the desire to implement new courses to meet the specific needs of companies. In addition, the key person's cooperative activities involve building up expertise for the requirements needed to open up to this new target group. This building up of expertise is important because the organisation is unfamiliar with offering these kinds of courses for companies.

Although these courses initially took place intermittently, they were not implemented as part of the regular course offer in the mid- or long-term. In retrospect, both interviewees state a gap between their prior expectations and the results. Remarkably, what at first sight seems to have simply not succeeded stands in contrast to the key person's report about undertaking various activities to implement the new course offers. They comprise, for example, continuous attempts to win over colleagues to ensure meeting the needs of company-oriented course offers and resting the responsibility on more than just the key person's shoulders. The general manager also supports the idea of implementing the new offers, which leads to questioning what obstacles hinder the expected, and obviously desired, implementation. From an analytical point of view, what initially seems not to operate as intended turns out to be the result of examining processes inside the organisation, following the same pattern as in the prior case. The next example is from the key person's interview and gives an impression of the internal negotiation about new course offers:

> Regarding the effects for the organisation, what can be said? Well, first of all, that is a question concerning the self-understanding of our house. In how far are soft themes[8], leadership and soft themes, that was a strategic issue from time to time, "does it belong to the profile of [organisation's name] and do we want to develop a corresponding offer?" But in sum, that didn't really win through. From time to time there have always been single rhetoric courses, also a leadership course, but it did not really become a core theme in the work here. (Key person, case 2)

Triggers calling for change are processed within the organisational communication, and resonance is augmented (negotiation takes place). Situations aiming to augment resonance follow the familiar pattern: Triggers are *analysed* inside the organisation ("that was a strategic issue"). Then they are *rated* ("does it belong to the profile"). Finally, a *decision is prompted,* ("do we want to develop a corresponding offer"). However, the difference here is that it is not a decision initiating change. Instead, the multi-step process occurs repeatedly ("that was a strategic issue from time to time"; courses took place, "from time to time", i.e., on approval) and recurrently leads to decisions *against* further processing. When examining possible explanations for this ambiguous situation, the requirements for implementing the new course offers do not match various internal conditions. This makes it functional for the organisation to reject triggers that do not match its self-identity. The case shows the organisation *takes notice* of the key person's triggers, it processes them by *augmenting resonance* in a way that includes negotiation and therefore *analyses, rates* and *decides* about further actions, but produces decisions to, metaphorically speaking, brush off triggers pushing towards change. This decision against change functions as a premise because it repeatedly guides the brushing off of triggers. Throughout the transcripts, each time the key person attempts to implement the course offers, it shows as a continuously reproduced decision. Here, the decision premise to brush off corresponding

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8   Courses addressing soft skills.

triggers prevents organisational learning. Its rejection becomes comprehensible despite referring to something *not* taking place. At the same time, this decision premise also revives the validity of hitherto existing premises by confirming not to change them. It stabilises the current status quo, again pointing to the actuality of already existing premises for dealing with cooperation.

Synopsis: Organisational Learning Between Taking up and Brushing off Triggers

Turning to the question as to which processes are necessary for organisations to either *take up* or *brush off* triggers individual learning offers to stimulate organisational learning, the results reveal a multi-step process within organisational communication. Once occurrences for individual learning have been *introduced* to the organisational communication, the multi-step process can lead to *augmenting resonance* for these matters by *analysing, rating* and *deciding* whether to take up or brush off triggers pushing towards change. Thus, these steps form the prerequisites for either *changing* or *reviving* the validity of existing structures.

The findings reveal different processual dimensions of organisational learning: First, the results highlight how triggers are processed in a way that enables considering them in organisational decision-making, thus preparing opportunities to adopt these triggers later on. Here, *organisational learning shows as it is occurring* by communication processes opening up triggers to be considered for change, albeit leaving open whether this does subsequently happen or not. Second, *organisational learning shows in retrospect as a previous process* that has resulted in already established premises, which relate to familiar challenges deriving from cooperation. Third, *organisational learning also becomes comprehensible through decision premises that aim at maintaining the existing status quo,* i.e., protecting existing structures from change and preventing organisational learning. Fourth, *organisational learning comprises changes in decision premises deriving from the multi-step process*. These dimensions point to a multi-faceted understanding of organisational learning that is not limited to *new* developments. Likewise, this understanding comprises the development of structures that *negate* organisational learning due to the organisation's ability to brush off triggers and preserve established structures.

Furthermore, *taking up* and *brushing off* triggers relate to each other *reciprocally*: already existing decision premises reflect that the organisation has taken on triggers and developed ways to deal with them. These premises allow the organisation to differentiate whether change is suitable or not. At the same time, the organisation's capability to reject triggers appears as *a prerequisite* for engaging in the melange of different interests and triggers that cooperative activities entail. Being able to reject triggers prevents the organisation from being disrupted by all possible opportunities for change. Thus, being able to brush off triggers prepares the organisation to expose itself to relevant contexts without necessarily inducing change. Rather, it can engage in cooperative activities and benefit from them whilst at the same time self-regulating which stimulations it takes on. The capability to differentiate between taking on and brushing off triggers enables the

organisation – and thus its employees – to indulge in a multitude of demands and diverse, ambiguous interests, typical in cooperative working contexts.

CONCLUSION

The question as to how organisations *take up* or *brush off* triggers that individual learning offers to stimulate change has become accessible by differentiating between learning at the level of organisations as social systems and learning as an individual process. The focus has been on relating these two phenomena to each other, tracing how *individual* learning in the context of cooperative activities can trigger a multi-step process within the *organisational* communication, thus leading to decisions about organisational learning.

Turning to implications for lifelong learning embedded in the organisational demands of the workplace, the findings demonstrate that a contribution of individual to organisational learning does not solely depend on the employees' work-related learning processes. Rather, it also depends on structural conditions within the workplace. Thus, acknowledging the role of the individual for organisational learning requires not overwhelming this role with a responsibility that also lies within the workplace's self-organisation of structures. Furthermore, the results show that engaging in a specific context (here: cooperating with AE providers) enables employees to enter a personally owned sphere of activity, thus developing a specific area of expertise. Fuller and Unwin (2004) refer to the term "learning territory" to express that "every individual has, and has had, access to a (unique) range of learning opportunities" (p. 133). The results highlight the potential for actively engaging in developments at the workplace if employees build up expertise in an autonomous sphere of activity with relevance to their work. However, this requires organisational structures that allow employees to introduce new impulses and alter hitherto existing routines.

Requirements and boundaries have been analysed as part of the paper's aim to carve out basic underlying communication processes for individual learning to promote organisational learning. Furthermore, explaining these processes serves as a prerequisite for subsequent research to specify which *conditions* make the sequenced mode of organisational communication and decision-making likely to occur. Further results from this study indicate that the key person's position within the home organisation is likely to influence decisive communication (Jenner, 2018, p. 268). For example, this may concern whether the key person takes a leadership role, has responsibilities linked to developing the organisation, or is involved in either core or peripheral spheres of activity within the organisation (Jenner, 2018, pp. 268–269). Additionally, the key person's involvement in internal networks with other colleagues as well as the importance of cooperative activities for the organisation are considered relevant for influencing decisive communication and also need further exploration (Jenner, 2018, pp. 269–271). These considerations indicate that it is also necessary to take power relations in organisational decision-making into account. Negotiation of interests and social power relations are known to influence programme planning in AE (Cervero & Wilson, 1998), suggesting power relations also play a crucial

role in other areas of organisational decision-making. It is important for AE to pursue these questions as understanding how to integrate working and learning remains a topical challenge, bearing in mind that "[t]he workplace is the locus of learning for many adults throughout their working career and thus WPL represents an integral and a substantive part of lifelong learning" (Sutherland Olsen & Tikkanen, 2018, p. 546) – especially in the current challenging times.

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Kristinka Ovesni

ORGANISATIONAL CLIMATE AND THE WORK-RELATED LEARNING OF EMPLOYEES: AN ANDRAGOGICAL PERSPECTIVE

ABSTRACT

The aim of this mixed methods research was to distinguish and to examine models of organisational climate regarding the work-related learning of employees. The theoretical rationale is found in the reflections of the learning supportive organisational climate as the main prerequisite of the process of participatory planning in adult education and learning, and as one of the core pillars in the process of building a learning organisation. For the purposes of triangulation and of complementarity, we adopted quantitative and qualitative methodology. The research was performed online from May to December 2018 and included employees from different companies in the Republic of Serbia. By using an explanatory sequential mixed methods research design with nested samples for the quantitative (Nqn=687) and the qualitative components (Nql=85), three models of organisational climate regarding the work-related learning of employees have been distinguished: the organisational climate of the fear of repression, the service-oriented organisational climate, and the learning supportive organisational climate.

Keywords: *organisational climate, work-related learning of employees, andragogical perspective on organisational climate*

ORGANIZACIJSKA KLIMA IN Z DELOM POVEZANO IZOBRAŽEVANJE ZAPOSLENIH: ANDRAGOŠKA PERSPEKTIVA – POVZETEK

Članek predstavlja raziskavo mešanih metod, katere cilj je bilo odkriti in raziskati različne modele organizacijskih klim v zvezi z delom povezanim izobraževanjem zaposlenih. Teoretično utemeljitev dajejo razmišljanja o organizacijski klimi, ki podpira učenje zaposlenih ter je tako glavni pogoj za proces participatornega načrtovanja v izobraževanju odraslih in eden od stebrov procesa ustvarjanja učeče se organizacije. Zaradi triangulacije in komplementarnosti sta uporabljeni tako kvantitativna kot kvalitativna metodologija. Raziskava je bila opravljena prek spleta med majem in decembrom 2018, sodelovali pa so delavci iz različnih podjetij v Srbiji. Prek obrazložitvene zaporedne raziskave mešanih metod z gnezdenimi vzorci kvantitativnih (Nqn = 687) in kvalitativnih komponent (Nql = 85) lahko z vidika

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izobraževanja na delu ločimo med tremi modeli organizacijske klime: organizacijska klima strahu pred represijo, storitveno usmerjena organizacijska klima in klima, ki podpira izobraževanje delavcev.

Ključne besede: *organizacijska klima, izobraževanje zaposlenih, organizacijska klima z andragoške perspektive*

INTRODUCTION

Conceptual Framework of Organisational Climate

Organisational climate is deeply intertwined with the growth and development of an organisation, with the organisation's ability to adapt to internal or to a variety of external changes, and it has the potential to support or discourage the work-related learning of employees. Although interesting for andragogy, the term organisational climate has not been fully theoretically or empirically explained and researched. Besides authors who define organisational climate as an autochthonous psychological construct "developed with the aim of specifying environmental influences on motivation and behaviour" (Sušanj, 2005, p. 14), the prevailing understanding is that the multidisciplinary scientific focus of studying and researching organisational climate cannot be reduced to a psychological aspect referred to as a separate construct of "psychological climate in the organisation" (DeCotiis, 1991; Kuenzi & Schminke, 2009). While the construct "psychological climate in the organisation" is defined as a reflection of individual perceptions of psychological impact on the work environment that affects employee well-being, organisational climate, in general, is defined as an aggregate collective perception of various aspects of the work environment (Kuenzi & Schminke, 2009).

The term organisational climate entered the focus of interest of andragogy in the 1980s with the popularisation of the participatory model of planning activities in adult learning where a "climate conducive to adult learning" has particular importance (Knowles, 1980) and intensified in later decades with the introduction of the concept of a learning organisation (Knowles, Holton, & Swanson, 2015; Ovesni, 2019; Watkins & Marsick, 1993). Nowadays, the perspective on organisational climate that puts employee learning at the centre of research interest is of great importance. It is considered more of a cognitive than an affective phenomenon because it refers to the perception that employees have about the functioning of the organisation, and not to the attitude of the organisation towards them as individuals.

Organisational climate is a cognitive phenomenon – it represents the meaning that employees attach to various aspects of action in the organisation: events, policies, practices, procedures, as well as rewarded, encouraged, and expected behaviour. It is a key element that guides individual behaviour and the way an individual reacts to the organisational context. Organisational climate is a concept that reflects the beliefs, values, and meanings that employees attach to individual, group, or general behaviour in an organisation. The

organisational climate affects many aspects of an organisation's performance: the future goals and vision, knowledge, skills, and competencies of its employees, the openness and innovation of the employees' knowledge, the support given to employees to achieve optimal or improve existing performance, etc. (Ovesni, 2019).

Organisational climate is influenced by different factors and each organisation develops a unique organisational climate that has a direct impact on employee behaviour because each organisation is associated with unique organisational factors (policy, formal and informal structure, etc.), and because each organisation is associated with broader social and cultural factors related to the organisational context. As a reflection, the dimensions of organisational climate are determined differently. For Schneider and Barbera (2014) the dimensions of organisational climate are: support provided by management to employees, management structure, care for new employees, intra-organisational conflicts, employee autonomy and general employee satisfaction. Nazari, Herremans, Isaac, Manassian and Kline (2011) believe that organisational climate is represented by four dimensions: risk-taking, owner ideas, openness, and trust.

Organisational climate research often focuses on examining: (a) the psychological climate in the organisation, (b) the differentiation of the elements of organisational climate and organisational culture, (c) organisational climate as conducive to some other phenomenon, (d) organisational climate as a part/aspect of organisational processes, (e) organisational climate in relation to another construct (Ovesni, 2019). Empirical research on organisational climate is performed in such a way that: a) organisational climate is viewed as a mediator, (b) mediators of the organisational climate–outcomes relationship are studied, and (c) moderators of the organisational climate–outcomes relationship are studied (Ovesni, 2019). Additionally, we can distinguish between the "molar" (generic) research that focuses on the significant experiences of individuals concerning organisational climate on the one hand, and "molecular" (focused) research about the components of experience concerning organisational climate on the other (Schneider, Ehrhart, & Macey, 2011, as cited in Ashkanasy, Wilderom, & Peterson, 2011). Examples of research that retain both perspectives are rare, and they are usually molar, but with an additional molecular focus.

For some authors (Ehrhart, Schneider, & Macey, 2014) organisational climate is a subjective, aggregate perception of an organisation that describes the way an organisation affects employees. Therefore, they believe that organisational climate can be studied only from an individual perspective and through indicators such as organisational orientation, the interpersonal relationships of employees, problem-solving, and through processes such as communication, decision-making, etc. Individual determinants and factors of the organisational context are often found as antecedents of the organisational climate in research, while many studies have found that organisational climate is indirectly influenced by gender, age and the length of tenure (Johnson, Beyerlein, Huff, Halfhill, & Ballentine, 2002).

For the purpose of our research we consider organisational climate as a construct, evolved in social sciences, that represents the employees' perception of the instrumental, affective, and cognitive dimensions of organisational performance elements, that has differentiated effects on employee behaviour, performance, expression of innovativeness, learning, interpersonal relationships, transmission, storage and processing of information.

Organisational Climate Conducive to Adult Learning

Knowles' (1980) understanding of a climate that is conducive to adult learning is particularly important in the andragogical sense because organisational climate does refer to psychological, organisational and to physical elements. Significant physical elements in the context in which adults learn relate, for example, to the equipment in the space in which learning takes place, informal seating arrangements, space decoration, acoustic characteristics, lighting, etc. Among the most important psychological elements of a climate conducive to adult learning are acceptance, respect and support, the existence of a spirit of togetherness between the adult learners and the facilitators of the learning process, freedom of expression without fear of punishment or humiliation, while important organisational factors are policy, structure of management system, size, industry, sector, basic business activities, etc.

Knowles (1980) emphasizes that it is especially important for employees "to feel more 'adult' to an atmosphere that is friendly and informal, in which they are known by name and valued as unique individuals" (p. 47). In this sense, the term *organisational climate conducive to employee learning* is a reflection of the andragogical influence in the organisational context (Klemenčič, 2018; Kulić & Despotović, 2004; Watkins & Marsick, 2003; Ovesni, 2014; Purković & Klapan, 2011; Savićević, 2007). For efficient, andragogically designed development of employees, an organisational climate consistent with their individual learning needs and with the changing needs of the environment is necessary. A positive organisational climate has the effect of encouraging participation in human resource development activities, and networked with management incentives and associate support, a positive organisational climate has the effect of an important moderator of the employees' motivation for learning (Sonnentag, Niessen, & Ohly, 2004).

The organisational climate related to the learning of employees is built not only by managers, but by all employees who play a key role in the organisation, "who learn from their experience, influence the learning of others, and create an environment of expectations that shapes and supports desired results that in turn get measured and rewarded" (Watkins & Marsick 2003, p. 134). Such a climate could be built by applying the strategies that are created in the organisation (Ovesni, 2019).

Empirical studies of the organisational climate viewed from an andragogical perspective are rare. Some researchers (Ovesni, 2019; Woods, Dinh, & Salas, 2017) found that the organisational characteristics that influence the formation of an organisational climate conducive to employee learning are: the organisation's support for various learning activities, the level of learning autonomy, and the participation requirements in different learning activities.

METHODS

The aspects of organisational climate relevant from the andragogical point of view, which reflect the organisation's approach to employee learning, form a research challenge that can be viewed through different lenses. For complex reasons, we decided to design the research of organisational climate and the work-related learning of employees from an andragogical perspective as a mixed method research that combines quantitative and qualitative components. The rationale to opt for such a research design is the fact that combined research provides significantly deeper insights into the nature of the relationship of the problems being examined, as well as insights that would not be visible if we opted for only one, either quantitative or qualitative, component of research (Johnson & Onwuegbuzie, 2004; Matović, 2013). The aim of combining the quantitative and qualitative components in this research was to broaden the understanding of the studied problem (*complementarity*), and to achieve mutual confirmation and support of the results obtained by using quantitative and qualitative methodology, i.e. to acquire more in-depth insights and improve the possibilities in terms of the generalisation and interpretation of the obtained data (*triangulation*) (Teddlie & Tashakkori, 2009). The next reason for combining quantitative and qualitative methodology is our intention to maintain a molar and molecular perspective in the study of organisational climate because quantitative research of it can be conceived only as a limited aggregate collective perception of the work environment (Ovesni, 2019).

The subject of the research is the aspects of organisational climate relevant from the andragogical point of view. Accordingly, the research aimed to explore the relationship between organisational climate and the work-related learning of employees through several organisation[1] related indicators (number of employees in the organisation, basic business activities, industry, sector of activities, the organisation's approach towards employee learning). In accordance with the selected explicit-successive model of mixed method research, after we received the research findings in the quantitative component, we approached the planning and elaboration of content for the qualitative component of the research. Consequently, to provide deeper insight into the results obtained in the quantitative component of the research, we asked two research questions for the qualitative component: How does the organisation design learning activities for employees? What is its general approach towards the work-related learning of employees?

Instruments

Quantitative component. To collect data on the characteristics of the organisations in which the respondents are employed, the questionnaire consisting of four closed-ended questions was used; the questions related to: the size of the organisation (expressed in terms of the number of employees), basic business activities, the industry in which the organisation operates and the sector of activities that the organisation performs.

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1   Due to the nature and scope of this paper, indicators related to the individual characteristics of the employees are not included.

The scale used to examine the approach of the organisation towards employee learning in the quantitative component of the research consisted of 26 items representing heterogeneous indicators (Table 1). Fourteen items in the instrument were based on previous research (Ovesni, 2019). The task of the respondents was to assess the degree of agreement with the items, where mark 1 meant complete disagreement, and 5 complete agreement with the item. The analysis of the internal metric characteristics of the instrument indicated a satisfactory level of reliability for research in the social sciences (Cronbach's α = 0.8593), but also pointed out the fact that the indicators of the organisation's approach towards employee learning was sufficiently heterogeneous and that there were no statistical reasons for their further reduction (Cochran's Q = 1750.457, Sig. = 0.000).

Table 1: Indicators of the organisation's approach towards employee learning

Enabling / facilitating ...
days off to complete formal education
material support for the completion of formal education
program of induction for new employees
participation in courses
participation in on-the-job training
participation in off-the-job training
participation in interpersonal skills training
work with a mentor
material support for attending courses
participation in seminars organised for employees
participation in conferences
reading work-related, professional journals
participation in lectures on various topics in the organisation
participation in congresses as a representative of the organisation
participation in workshops
participation in meetings on various work-related problems
participation in webinars
acquiring new knowledge through cooperation with managers
encouraging employees to share knowledge through ICT
using social networks to exchange opinions with colleagues
using online forums to exchange opinions with colleagues
contacts with an expert for advice related to work or private life
encouraging learning from colleagues
contacts with users aimed to improvement of the job performance
encouraging cooperation with colleagues from other organisations
lack of provision of learning opportunities

Qualitative component. The instrument we applied to collect data for the qualitative part of the research was a structured interview. Apart from the general data on the bio-social-work characteristics of the interviewees (gender, age, educational level, area of formal education, length of tenure, length of tenure and position in the organisation in which they are currently employed), the instrument contained a list of the two aforementioned open-ended questions. The average duration of the interview was from 17 to 35 minutes, and with the consent of the interviewees, audio recordings were made and then transcribed. At the beginning of each interview it was emphasized that it was anonymous and the personal information of the interviewees is protected by the covering data on the organisations of employment, while personal names have been replaced by random ones.

Data Analysis Techniques

The collected data were subjected (in the first component) to a few common (frequencies, std. deviation, means, χ^2 test with associated procedures etc. with IBM SPSS Statistics 23) and more complex statistical proceedings (ItemItem analysis with Cronbach's α statistics; ANOVA procedure; nonparametric tests with associated hypothesis testing models, etc. with IBM SPSS Statistics 23 and Dell Software STATISTICA 12.5). To supplement them, interview transcripts were processed with MAXQDA10 software. Interview transcripts were subjected to thematic analysis and thematic grouping of data. Data coding was performed in two cycles, whereby in the first cycle the collected data were grouped into two subcategories: the organisation of learning activities and the general approach of the organisation towards the work-related learning of employees. In the second coding cycle the obtained, classified data were: prioritised, integrated, synthesized, abstracted, and conceptualised.

Sample

Quantitative component. The data for quantitative analyses were collected online using the Kwiksurveys application on the random sample of employees in different organisations from 10 cities in Serbia (Nqn=687). The online questionnaires were distributed to 925 respondents. We received a total of 687 completed surveys, with a response rate of 74.3%. The demographic variables included age, gender, and length of tenure (Table 2).

Table 2: Overview of the sample structure with respect to demographic variables

age	frequencies	Pct.
18 to 30 years	210	30.6
31 to 40 years	213	31.0
41 to 50 years	154	22.4
51 to 60 years	95	13.8
more than 61 years	15	2.1
Total	N=687	100.0%

gender	frequencies	Pct.
men	225	32.8
women	462	67.2
Total	N=687	100.0%
length of tenure	frequencies	Pct.
0 to 5 years	108	15.7
6 to 15 years	235	34.2
16 to 25 years	183	26.6
26 to 35 years	127	18.5
more than 35 years	34	4.9
Total	N=687	100.0%

Qualitative component. From the quantitative component sample, we selected 85 respondents with different lengths of tenure (Nql=85) for the qualitative component. The sample includes 34 men and 51 women. Three interviewees are under the age of 30, 33 are between 31 and 40, 30 are between 41 and 50, 17 are between 51 and 60, and two interviewees are over 60 years old. Correspondingly, the sample for the qualitative component of the study includes 13 randomly selected interviewees with less than five years of tenure, 30 interviewees with 6 to 15 years of tenure, 22 interviewees with 16 to 25 years of tenure, 16 interviewees with 26 to 35 years of tenure, and four interviewees that have more than 35 years of tenure.

RESULTS

Quantitative Data

More than half of the employees as indicators of the organisation's attitude towards learning state that the organisation encourages them to learn from colleagues (68.7%) and supports them in participating in on-the-job training (52.7%). More than a third of the employees indicate that the organisation in which they are employed provides them with the following: reading professional journals (36.5%), participation in meetings on various work-related problems (36.5%), participation in courses (36.4%), exchange of knowledge through ICT (36.4%), use of online forums to share experience with colleagues outside the organisation (34.5%), off-the-job training (33.8%), cooperation with colleagues from other organisations (33.8%), and a program of induction for new employees (33.5%). Very few employees indicate that the organisation helped them financially in acquiring formal education (7.9%). However, it is very concerning that more than two out of five (43.1%) respondents indicate that the organisation in which they are employed does not provide them with special learning opportunities and that they are directed to self-inform about relevant changes in the work they perform.

Applied analysis of variance showed that there are statistically significant differences between respondents regarding the *number of employees in the organisation* (size of the organisation) in which they are employed in terms of multiple scores for reporting on the organisation's approach towards employee learning. Due to the limited explanation offered by an analysis of variance, through F-ratio, which is not able to tell us more about the differences between the groups of the data, we provided the results of: an analysis of magnitude of differences between groups, post-hoc comparison with REGWQ procedure and multiple comparison with Tukey HSD and Games-Howell tests for statistically significant results of the ANOVA procedure (Table 3).

Table 3: Overview of the statistically significant findings of the analysis of variance for the number of employees in the organisation and the organisation's approach towards employee learning

Enabling / facilitating ...	M	SD	SE	$F_{(5,686)}$
reading work-related, professional journals	.30	.458	.017	F=4.26; p<0.01
participation in lectures on various topics in the organisation	.21	.410	.016	F=11.58; p<0.01
participation in meetings on various work-related problems	.37	.482	.018	F=3.47; p<0.01
contacts with users for improvement of job performance	.34	.476	.018	F=11.66; p<0.01
lack of provision of learning opportunities	.43	.496	.019	F=2.96; p<0.05
	Mgn. Dif.		W.st.	groups[2]
reading work-related, professional journals	1.01, p<0.01		4.45, p<0.01	5
participation in lectures on various topics in the organisation	1.62, p<0.01		7.75, p<0.01	1
participation in meetings on various work-related problems	1.04, p<0.01		4.03, p<0.01	5
contacts with users for improvement of job performance	1.79, p<0.01		10.38, p<0.01	1, 5
lack of provision of learning opportunities	.95, p<0.01		3.44, p<0.05	3

Based on the results of the applied analysis of variance with post-hoc comparison tests (Table 3), it is possible to consider that enabling the reading of work-related, professional journals is significantly more often present in large companies with over 10,001 employees; in these organisations, employees participate in meetings about various problems in the work that are organised for them more often and have more contact with users in order to improve work performance, but a lack of provision of learning opportunities is

2   Results for group differences based on REGWQ Post Hoc Test (Cribbie & Keselman, 2003; Salkind, 2010). Legend: group 1 -- organisations with 1 to 500 employees, group 2 -- organisations with 501 to 1.000 employees, group 3 -- organisations with 1.001 to 5.000 employees, group 4 -- organisations with 5.001 to 10.000 employees, group 5 -- organisations with more than 10.001 employees.

also present more often. Although one would expect large companies to invest more in their employees' development, due to the material resources they have, the findings indicate a different trend in their human resource development policy. According to the obtained results, large companies express a tendency to enable employee participation only in those activities that are directly related to business improvement but not in structured or semi-structured learning activities, which are reduced almost exclusively to provision of professional literature. In large companies the provision of learning opportunities is insufficient. The absence of structured and organised learning activities for the employees may be a reflection of several delicate economic and political factors: the nature of the owners' capital (most of the capital in large companies is from foreign investors, without interest in the development of employees, i.e. into a foreign workforce), the types of work performed in these companies (retail business, the production of already developed products without departments for research and development, usage of already tested technology, etc.), compliance with labour laws, inadequately professionally prepared employees in the field of human resource development, etc. We also found that in the organisations with less than 500 employees, public lectures are less frequently organised, while contacts with users are rarely seen as an opportunity to improve business performance.

Of all the examined relations between basic business activities and indicators of the organisation's approach towards employee learning, it was found that alternative statistical hypotheses on the unequal distribution of answers among respondents with regard to whether organisations in which employees are engaged in production, distribution, or production and distribution of goods and services are confirmed for several indicators (Table 4). In all these cases, the Cramer's V coefficient is statistically significant, which indicates that the findings are not accidental and that the strength of the established stochastic relations between basic business activities and the indicators of the organisation's attitude to employee learning is significant.

Insight into the cross-tabulation for established connections shows that among all organisations that provide material support for the completion of their employees' formal education, 94.4% are organisations that provide services. Observing the percentage of participation in the construction of responses, we found that these organisations dominate over others (between 83.6% to 68.5%), in terms of enabling participation in different learning activities. On the other hand, the organisations engaged in the production of goods and provision of services enable employees to use online forums to exchange opinions with colleagues more rarely than expected (18.6%).

The reasons for such findings are unclear because the χ^2 test does not have potential for detailed statistical explanation (Salkind, 2010). More precisely, in the case of this research, the χ^2 test does not have potential to explain the complex relationship between indicators of the organisation's approach towards employee learning and the basic business activities of the organisation. Although it is possible to consider that the findings we obtained are affected by the situation in the Serbian economy, in which (according

Table 4: Overview of the statistically significant findings of χ^2 test for the basic business activities and the organisation's approach towards the learning of employees

Enabling / facilitating ...	χ^2	df	Sig.	Cramer's V
material support for the completion of formal education	9.954	2	p<0.01	.120
participation in off-the-job training	11.07	2	p<0.01	.127
participation in interpersonal skills training	6.482	2	p<0.05	.097
participation in conferences	10.282	2	p<0.01	.122
acquiring new knowledge through cooperation with managers	7.729	2	p<0.05	.106
using online forums to exchange opinions with colleagues	6.242	2	p<0.05	.095
encouraging cooperation with colleagues from other organisations	8.285	2	p<0.05	.110

to data for 2018) production business entities account for 56.64%, with the industrial production index for August 2019 being only 0.5% and gross domestic product (GDP) 4.4% (Statistical Office of the Republic of Serbia, 2019). Based on the obtained results, it is also possible to consider that the orientation of economic development different from the current one, for example, in economic entities structured as small and medium-sized organisations with a clearer strategic orientation, would be reflected in a different way.

In accordance with the explanations of these findings, the result of the χ^2 test for the industry in which the organisation operates and the organisation's approach to employee learning shows that there are no statistically significant variations in the respondents' answers regarding the area in the organisation in which they are employed. Statistical null hypotheses on the equal distribution of responses were confirmed for all indicators included, which is evidenced by the Cramer's V coefficient. It is possible that the research findings reflect the current situation in the Serbian economy, where it seems there are no special investments in the development of any industry. The next possibility to explain the obtained results lies in the strategic orientation of the economic development of the Republic of Serbia. Although calls for a shift towards modern technologies are increasingly present in public discourse, the data obtained do not show that this industry is rapidly developing (in terms of investing in the learning of employees).

Based on the findings obtained using the χ^2 test and with associated procedures as well as cross-tabulation it can be noticed that there are statistically significant differences among respondents regarding the sector in which the organisations operate in terms of reporting on the organisation's approach to employee learning regarding several activities (Table 5).

Of all the examined relationships between the sector in which the organisations operate and their approach towards employee learning, it was found that alternative statistical hypotheses on the unequal distribution of responses among respondents were confirmed for a number of indicators (Table 5). In all cases, the Cramer's V coefficient is statistically significant (Table 5), which indicates that the obtained findings are not random and that the strength of the established stochastic relations is significant as well.

Table 5: Overview of the statistically significant findings of the χ^2 test for the sector in which the organisations operate and their approach towards employee learning

Enabling / facilitating ...	χ^2	df	Sig.	Cramer's V
days off to complete formal education	14.354	2	p<0.01	.145
material support for the completion of formal education	11.129	2	p<0.01	.127
participation in courses	17.272	2	p<0.01	.159
participation in on-the-job training	13.774	2	p<0.01	.142
participation in off-the-job training	8.508	2	p<0.05	.111
material support for attending courses	6.542	2	p<0.05	.098
participation in seminars organised for employees	49.447	2	p<0.01	.268
participation in conferences	52.517	2	p<0.01	.276
reading work-related, professional journals	11.516	2	p<0.01	.129
participation in lectures on various topics in the organisation	12.437	2	p<0.01	.135
participation in congresses as a representative of the organisation	44.305	2	p<0.01	.254
participation in workshops	8.170	2	p<0.05	.109
participation in meetings on various work-related problems	13.169	2	p<0.01	.138
participation in webinars	8.914	2	p<0.05	.114
acquiring new knowledge through cooperation with managers	20.006	2	p<0.01	.171
encouraging employees to share knowledge through ICT	0.140	2	p<0.01	.014
using social networks to exchange opinions with colleagues	6.263	2	p<0.05	.095
contacts with an expert for advice about work or private life	17.625	2	p<0.01	.160
encouraging cooperation with colleagues from other organisations	7.876	2	p<0.05	.107
lack of provision of learning opportunities	33.197	2	p<0.01	.220

A quick look at the results (Table 5) might give the illusion of an ideal picture of a balanced and widespread distribution of activities of employee learning, but with deeper analysis, even with insight into the simple cross-tabulation, such perception will dissipate into discouraging data. Thus, the provision of days off to complete one's formal education (80.4%) or the provision of material support for completing one's formal education (94.3%) is a very rare practice, especially in the private sector, although it is the legal obligation of the employer (Zakon o radu, 2018). Regardless of the sector in which they perform their activities, over four-fifths of the organisations, although this is an obligation prescribed by the Labor Law (Zakon o radu, 2018), do not provide employees with material support for participation in courses (83.8%). At the same time, the situation is slightly different in the non-governmental sector, where 'only' 68.6% of the organisations do not provide employees with material support for participation in courses. The organisations that operate in the public sector enable their employees to participate in on-the-job training (62.7%) and in meetings on various work problems organised for employees (45.6%) significantly more often than others. However, employees also report that the organisations very rarely allow them to participate in webinars (82.5%).

Although almost two thirds of the employees in the private sector report that their employer provides them with learning opportunities (64.4%), they also report that their employer does not enable them to participate in some of them. These "unclear findings", as explained in some previous studies (Ovesni, 2019), suggest that it is possible that learning activities are selectively provided to different groups of employees (e.g. participation in conferences or seminars for employees in senior positions).

The employees in the non-governmental sector report significantly more often that the organisations in which they are employed do not allow them to participate in lectures that the organisation conducts for employees (88.6%) or enable them to read magazines that contain information about the work they do (82.9%). It is possible that the reason for such a finding lies in the fact that the non-governmental sector consists of organisations with a small number of employees, which do not have sufficient resources to provide public lectures or to purchase professional journals. However, employees in the non-governmental sector report significantly more often on the support they receive to participate in other learning activities (Table 5).

Qualitative Data

The initial question referred to the organisation of learning activities in the organisations where the interviewees are employed. The aim of this question was to activate the critical thinking of the employees about the organisation of work-related learning activities. Two main themes with several dominant narratives have been retrieved.

In the first theme, *the absence of organised learning activities* (typical for 25 interviewees), the focus was on the answers about the lack of organised learning activities. Within the first topic, four types of dominant narratives were retrieved. The first type of narrative (typical for eleven employees) indicates the absence of organised learning activities. The

second type of narrative (typical for two employees) emphasizes resignation and a critical attitude towards how learning activities were organised in the past, but that they are no longer realised. The third group of narratives (typical for five interviewees) indicates a dominant "tone of dissatisfaction" due to the lack of learning activities or their selective distribution. For some employees, dissatisfaction with their exclusion from organised learning activities extends to general job dissatisfaction:

> Human resources sometimes hold trainings for some other employees. But we never, ever had training for secretaries, so it is not like I am really learning in the workplace. And I don't think I have anything special to learn about my job. (Rose, 45, secretary)

Differences in the treatment of employees can be so strong that they lead to the creation of jealousy, dissatisfaction, and internal tensions in the organisation.

> We have a sector that deals with that, but those courses, seminars, team building exercises are organised for other people. None of this is intended for associates. We are irrelevant. (Helen, 46 years old, associate)

In the fourth group (typical for seven interviewees) are the narratives of employees who decided to undertake the organisation of learning activities themselves because the organisation in which they are employed does not:

> Regarding learning, I was mostly self-engaged and thanks to the Internet I managed to find out and learn something that was useful for my work. (Peter, 53 years old, associate)

Within the second theme, *organisers of learning activities* (typical for 60 interviewees), three types of dominant narratives have been retrieved. The first type of narrative (typical for 32 interviewees) showed that in some organisations work-related learning activities rarely take place, are unplanned, unarticulated, unstructured, and most often *ad hoc*, without human resources development services.

In the second type of narrative (typical for 22 interviewees), the employees state that their organisation's human resources development department is planning, organising, and implementing various learning activities. The third type of narrative (typical for 6 interviewees) shows that in the absence of articulated work-related learning activities, employees are "on their own". Under such circumstances, employees often use ICT in their own free time, without the support of the organisation, with a strong self-directedness in the selection of work-related learning activities:

> I often attend various courses and trainings on my own initiative because I like to learn and develop in my profession, because I like to be up to the task. (Ann, 54 years old, associate)

The next question was aimed at activating the critical thinking of employees about the general approach in their organisation towards the work-related learning of employees. Four main themes have been retrieved.

The first theme (typical for 26 interviewees) revealed that most employees are "on their own" regarding work-related learning activities. Some of the employees are not sure about the importance of such learning, while many of them are dependent on ICT.

Within the second theme (typical for 34 interviewees) the focus was on the habit that employees learn informally through collaboration with colleagues from the organisation. This type of learning has complex andragogical effects because it enhances interaction among employees and intensifies commitment and identification with the organisation and leads to creating an organisational climate conducive to learning. Informal learning through collaboration with colleagues from the organisation builds respect for older colleagues and encourages the intergenerational networking of employees; it has special significance for learning about the informal organisational culture and informal structure of the organisation:

> Learning is realised mostly through mutual teaching between colleagues. The older and more experienced ones transfer knowledge to the younger ones directly in the workplace. (Tiana, 53, technician)

The third theme (typical for 12 interviewees) revealed that employees learn in teams too. In some organisations team learning is realised through dialogue among the employees while groups perform research of the possibilities for solving problems. The exploration of problem-solving opportunities, which can only take place in a trust-dominated organisational climate, is the key difference between imposing ideas and talking/dialogue as a way of learning.

> My team has been established in such a way that, although there is a hierarchy, all members enjoy equality in the sense that they can always turn to anyone for help. I also helped older colleagues like they helped me. Each member of the team contributes to everyone else by sharing knowledge, that is extremely important in our field because of the overall changes. (Greg, 32, associate)

The fourth topic (typical for 40 interviewees) revealed that just-in-time work-related learning is an extremely important learning activity that they undertake. This type of learning, based on ICT, is often used for communication and sharing information between employees, usually to find an adequate solution to a current problem at work as soon as possible. It is characterised by a focus on knowledge, skills and solutions, and is inseparable from the work process:

> We are primarily trying to solve problems on the spot, if that is not possible, then we establish communication with certain higher instances. ICT allows

us to solve the problem as soon as possible, using computers and the internet. That's what we can't do without ICT, which we rely on a lot. (Boris, 47 years old, technician)

This type of informal learning offers a variety of content and activities that can be undertaken. Just-in-time work-related learning is sometimes highly individualised, happens in real time, and provides the required information. Learning activities are approached asynchronously, at a time when it suits the employee. Sometimes, by involving colleagues from other organisations, it represents a kind of extension of collaborative learning, and in some cases, it is part of the organisation's strategy, enabling a rapid acquisition and timely circulation of knowledge through all organisational components.

DISCUSSION

The results emphasize the importance of a complex approach in redesigning organisational climate and the work-related learning of employees for the improvement of organisational performance. In spite of the findings that indicate that many organisations encourage employees to participate in on-the-job trainings, most of them expressed a tendency (for most of the employees) to maintain only learning from colleagues, which (although widespread) is an inadequate, outdated and insufficient practice. For management, it implies appropriate trainings aimed at the comprehensions of organisational complexity and at the importance of an andragogically developed climate for the work-related learning of employees, along with a rigorous implementation of legislation related to employee learning and training. Furthermore, because professionally trained andragogues are the group of practitioners that have adequate core competences for designing organisational climate and the work-related learning of employees, developed during their formal, university education, their broader engagement in the field of human resource development is of great importance.

Considering all results in both (quantitative and qualitative) components as sketched by the employees involved in this research, three possible models of andragogical perspectives of organisational climate could be distinguished:
- The organisational climate where the fear of repression for using time for learning is expressed together with a lack of group discussion with the employees and a lack of exchange of job relevant information among employees. The activities of employee learning in such organisations are limited and the actions of the employees are "veiled in secrecy", while communication with employees and especially with colleagues from other organisations is not allowed. Such a climate is often present in large companies, in the companies engaged in the production of goods and provision of services, and companies in the private sector.
- The service-oriented organisational climate where on-the-job trainings are organised and cooperation with colleagues from other organisations is encouraged. The organisational climate is characterised by the custom of advising an employee by

management, by selective distribution of support for learning from the experience of other colleagues, as well as by selective support for courses and formal education programs, and by unstructured learning activities that may (but do not have to) be realised through ICT. This organisational climate is often present in the organisations that operate in the non-governmental and public sector.

- The learning supportive organisational climate, where discussions among employees, managers, and colleagues from other organisations are common. The organisational climate in these organisations is, from the andragogical perspective, supportive of learning because a wide range of learning activities is offered to employees, sometimes with a certain degree of business secrecy due to the prohibition of social networking among colleagues. This kind of organisational climate is dominant in organisations that provide services.

CONCLUSION

Our study indicates the need to engage professionally prepared andragogues in positions in the field of human resource development, a more rigorous application of legislation related to employee learning and training, trainings aimed at informing and helping managers understand the importance of the work-related learning of employees in changing the world of business for the purpose of improving the organisational climate. This implies that by adopting a model of learning organisations, an organisation could benefit from the transformation into an andragogically designed working and learning context. Furthermore, organisations could benefit from more intensive work-related learning, e.g. just-in-time work-related learning based on ICT, which requires more transparency and the free flow of organisational knowledge among employees.

Although cross-sectional data and explanatory sequential mixed methods research design with nested samples makes that results of the study and the subsequent conclusions remain stable over time, our research should be complemented with probability samples and should move beyond the discourse of the local, Western-Balkan context by adopting comparative foci. In this respect some replicated studies with a similar research design or quantitative studies with more complex statistical data analysis would be appreciated.

Financing

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Igor Ivašković

DILEME SPREMLJANJA UČINKOVANJA NAČRTOVANEGA UČENJA NA ORGANIZACIJSKO USPEŠNOST

POVZETEK

Prispevek proučuje problematiko spremljanja rezultatov učenja v organizacijskem kontekstu in poskuša ponuditi odgovor na vprašanje, zakaj in kako na organizacijski ravni spremljamo učinkovanje načrtovanega učenja na uspešnost. S pomočjo pregleda literature na področju poslovnih ved avtor sistematizira razprave in ugotavlja, da pri tem zaradi kompleksnosti in zahteve po uporabi različnih metodoloških prijemov še vedno obstaja veliko nesoglasij. Kljub temu meni, da je spremljanje nujno, saj je prvi pogoj za identifikacijo pomembnih točk dela, pojasnjuje pričakovanja vodstva do zaposlenih in spodbuja njihovo kreativnost. V sklepu avtor poudarja, da je pri spremljanju treba poznati kontekst organizacije, proces načrtovanega učenja in njegove rezultate pa je treba spremljati večdimenzionalno ter na več ravneh. Pri tem je nujno ohraniti enostavnost izvedbe spremljanja in razumljivost ugotovitev.

Ključne besede: *učenje, strategije, uspešnost, delovno mesto, spremljanje, učinki*

THE DILEMMAS OF MONITORING THE EFFECTS LEARNING HAS ON OR-GANISATIONAL PERFORMANCE – ABSTRACT

The article examines the issues of monitoring the effects of learning in an organisational context and attempts to answer the following question: "Why and how can we monitor the effects learning has on organisational performance?" The author provides a review of the relevant literature from the field of business management and finds many discrepancies that are due to the complexity and the use of various methodological approaches. Nevertheless, the author establishes that monitoring is necessary because it makes it possible to identify certain key points in the working process, clarifies the expectations management has of the employees and encourages their creativity. At the same time, the article emphasizes that the monitoring process requires knowledge of the organisational context, and the learning process and its effects need to be studied on a multidimensional and multi-level basis, while the monitoring process itself should be simple to implement and the findings easy to understand.

Keywords: *learning, strategies, performance, workplace, monitoring, effects*

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UVOD

V preteklem stoletju se je razvila posebna znanstvena disciplina o odnosu med organizacijo in posameznikom, ki v njej deluje. V slovenščini poznamo več prevodov angleškega termina *human resource management*,[1] kot kratica pa še vedno prevladuje uporaba »HRM«. Če izhajamo iz Lipovčeve (1987) opredelitve organizacije, lahko HRM opredelimo kot razumevanje odnosov med posamezniki, nalogami in organizacijo, pri čemer je namen vplivanja na ta razmerja povečevanje uspešnosti (z organizacijskega, individualnega in družbenega vidika). HRM torej zajema vsako dejavnost, ki vključuje odnos delavca in delodajalca, pri čemer je fokus na procesih analize dela in identifikaciji organizacijskih potreb, privabljanju in izbiri ljudi, njihovem uvajanju v delo in usposabljanju ter končno tudi na plačevanju oz. nagrajevanju.

Načrtovano učenje[2] v organizacijskem kontekstu običajno poteka v okviru dejavnosti HRM, pri čemer lahko govorimo o andragoškem procesu, ki je namenjen praktičnemu učenju s ciljem povečanja uspešnosti organizacije. Tu je nujno poudariti, da dejavnost HRM ni omejena samo na kadrovski oddelek, temveč se nanaša na vse odnose med ljudmi, ki so usmerjeni k pridobivanju in razvoju kompetenc zaposlenih. Učenje v organizacijskem kontekstu z omenjenim ciljem povečanja končne uspešnosti organizacije se v najožjem pomenu opredeljuje kot usposabljanje, saj gre za razvijanje kompetenc, ki jih zaposleni potrebuje pri opravljanju konkretenega dela (Možina idr., 1998). Vendar se je treba zavedati, da proces načrtovanega učenja v organizaciji poteka v bistveno širšem kontekstu, tudi zunaj delovnega mesta. Predvsem v nerutinskih dejavnostih v nepredvidljivem okolju pa se učenje pogosto fokusira na razvoj kompetenc, ki v danem trenutku niso neposredno povezane s konkretnim delovnim mestom. Ravno takšno širše opredeljeno učenje v organizacijskem kotekstu obravnava pričujoči prispevek.

HRM kot načrtna dejavnost ima namen mobilizirati in upravljati oz. usmerjati znanje s ciljem uresničevanja organizacijskega poslanstva (Nicolini, Gherardi in Yanow, 2003). Procesi HRM so posledično usmerjeni na razvoj delovnih kompetenc, kar vključuje pridobivanje znanja, veščin, povečanje motivacije ter razvoj samopodobe in dispozicij posameznika za delovanje. Ker so kompetence kompleksni in dinamični konstrukti, teh ni vedno lahko meriti, posledično pa prihaja tudi do težav pri spremljanju učinkovanja učenja v

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1 V slovenskem prostoru še vedno ne obstaja konsenz o prevodu »*human resource management*«, kar se najbolj kaže v različnih interpretacijah izraza »management« (Celinšek, 2015; Rozman, 1996). Med pogostejšimi prevodi lahko zasledimo »ravnanje z ljudmi pri delu«, »ravnanje s človeškimi viri«, »upravljanje človeških virov«, »management človeških virov«, »kadrovski management« itd. Rozman (1996) meni, da je izbor besede »ravnanje« v tem kontekstu najprimernejši, saj se beseda »upravljanje« nanaša na funkcijo, ki je v domeni lastnikov. Obenem je izbor izraza »ravnanje z ljudmi pri delu« nekoliko primernejši od »ravnanja s kadri« ali »kadrovskega managementa«, saj se HRM nanaša na bistveno širšo dejavnost ravnanja z ljudmi, ne zajema namreč samo tistih, ki sodijo med kadre določene organizacije.

2 Pri tem je treba nujno omeniti, da se sicer večina učenja v sodobnih organizacijah odvija spontano, in sicer kot del delovnega procesa, mimo oddelkov HRM in njihovih aktivnosti. Temu se v zadnjih 20 letih tudi v HRM-literaturi namenja več pozornosti (Skule, 2004). Res je, da se samo učenje težko meri, ključna za delodajalca je predvsem identifikacija okoliščin, ki privedejo do pozitivnih posledic.

organizacijskem kontekstu na uspeh orgaizacije. Članek ima namen prispevati k razpravi o tej problematiki, in sicer z iskanjem odgovorov na vprašanje, zakaj in kako na organizacijski ravni spremljamo učinkovanje načrtovanega učenja na uspešnost. Pri tem gre primarno za analizo učinkov učenja na organizacijski in sekundarno na individualni ravni. Razvoj takšnega spremljanja je namreč doživel ekspanzijo v drugi polovici 20. stoletja, a pri tem zaradi kompleksnosti in zahteve po uporabi različnih metodoloških prijemov[3] še vedno obstaja veliko nesoglasij glede smiselnosti spremljanja.

S pomočjo polsistematiziranega pregleda literature, predvsem kvantitativnih HRM-študij s preloma stoletja, v skladu s priporočili avtorjev Snyder (2019) ter Wong, Greenhalgh, Westhorp, Buckingham in Pawson (2013) prispevek sistematizira argumente za spremljanje učenja in njegovih učinkov ter aplicira mnenja zagovornikov univerzalnih HRM-praks in na drugi strani nasprotnikov te teze na problematiko spremljanja učenja v organizacijskem kontekstu. Pri tem je poleg že omenjenega raziskovalnega vprašanja temeljni cilj ugotoviti, ali obstajajo univerzalne smernice za spremljanje učinkov učenja v organizaciji. Prvi del prispevka opredeljuje pomen učenja v organizacijskem kontekstu, v drugem sledi razprava o tem, ali je lahko učenje strateški dejavnik konkurenčne prednosti za organizacijo. Na koncu so v ospredje postavljene dileme, ki se pojavljajo pri merjenju, ter navedena priporočila za spremljanje učinkovanja učenja na organizacijsko uspešnost.

ORGANIZACIJSKA SPOSOBNOST UČENJA KOT STRATEŠKI DEJAVNIK KONKURENČNE PREDNOSTI

Širitev procesov liberalizacije, nova tehnološka odkritja, povečevanje zahtevnosti potrošnikov in drugi procesi, ki jih običajno prištevamo v kontekst globalizacije, silijo organizacije k prilagajanju in pospešenemu iskanju svoje konkurenčne prednosti. Feurer in Chaharbaghi (1995) sta konkurenčno prednost opredelila kot redek dejavnik ali težko posnemljivo kombinacijo več dejavnikov, zaradi katerih je organizacija uspešnejša od drugih. Čater (2003) pri opredelitvi konkurenčne prednosti povzema njeni dve bistveni lastnosti, in sicer prednostni položaj organizacije in relativnost. Medtem ko se prednostni položaj nanaša na superiorno pozicijo organizacije, relativnostna komponenta opozarja, da je konkurenčno prednost mogoče opaziti in izmeriti le s primerjanjem te lastnosti pri več organizacijah. Če izluščimo bistvo opredelitev, ki pojasnjujejo, kaj vse je potrebno, da bi neki dejavnik izpolnjeval kriterije za konkurenčno prednost, lahko zapišemo naslednje (Wright in McMahan, 1992):

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3   V HRM-literaturi lahko zaznamo dilemo, ali prilagajati študije in metode raziskovanja objektom, ki jih analiziramo, ali pa raje sprejeti univerzalna pravila o pristopu k obravnavi problematike HRM. Delaney in Huselid (1996) ugotavljata, da se kot problem kaže ravno dejstvo, da je zelo malo študij HRM, ki bi uporabile povsem enake metodološke pristope in orodja. Sočasno je to do določene mere razumljivo, saj so sklopi praks HRM močno odvisni od panoge, strukture zaposlenih, tehnologije in od številnih drugih dejavnikov, ki ne omejujejo samo managementa pri sprejemanju in izvajanju procesov HRM, temveč tudi raziskovalce pri merjenju njihovih učinkov.

1) dodajati mora pozitivno vrednost organizaciji (omogočati pozitivne ekonomske koristi);
2) mora biti edinstven ali vsaj redek;
3) ne sme biti enostaven za posnemanje in
4) je nenadomestljiv oz. ne sme imeti zadovoljivih nadomestkov.

Po Barneyju (1991) lahko vire konkurenčne prednosti razdelimo v fizične, človeške in organizacijske. Medtem ko med prve prištevamo predvsem tehnologijo, zgradbe, opremo, geografsko lokacijo itd., so ključni organizacijski dejavniki lahko formalna organizacijska struktura, formalno in neformalno načrtovanje, kontrola in koordinacijski sistemi, neformalni odnosi med skupinami znotraj organizacije ter med organizacijo in njenim okoljem. Človeški viri na drugi strani lahko omogočajo konkurenčno prednost na podlagi znanja, pridobljenega z usposabljanjem ali izkušnjami, inteligentnosti in medčloveških odnosov (Pološki-Vokić, 2003; Lazović, 2013). Danes relativno majhen delež podjetij lahko gradi konkurenčni položaj izključno na edinstveni lokaciji ali na boljši dostopnosti surovin, ki jih je nemogoče ali ekonomsko nesmotrno umetno ustvariti, zato nematerialna lastnina dobiva vse večji pomen (Hitt, Bierman, Shimizu in Kochhar, 2001; Lazović, 2013). V literaturi s področja managementa se za nematerialno lastnino najpogosteje uporablja izraz intelektualni kapital, ki ga Dovžan (2003) opredeljuje kot najpomembnejše proizvodno sredstvo. Delimo ga na človeški in strukturni, pri čemer slednjega sestavljata organizacijski kapital in kapital kupcev (Stewart, 1997). Raven nematerialne vrednosti organizacije lahko okvirno izmerimo že s primerjavo računovodske in tržne vrednosti organizacije. V obdobju zadnje globalne ekonomske krize, manjšega zaupanja in posledično manjšega obsega trgovanja je bilo razmerje med tržno in knjižno vrednostjo sicer manjše kot v začetku stoletja, vendar so tudi v tem obdobju najboljša podjetja še vedno povečevala to razliko v prid tržne vrednosti. Na podlagi tega lahko sklepamo, da ne le podjetja, temveč tudi različne vladne organizacije vse večji poudarek dajejo ustvarjanju nematerialne lastnine po načelih učeče se organizacije (Fenwick, 1998). To velja celo za kapitalsko intenzivne, še bolj pa za tiste organizacije, katerih bistvo delovanja so znanje, odnosi s kupci itd. (Mayo, 2001).

Spreminjanje vrednosti materialne (fizične) in nematerialne lastnine organizacije je v največji meri odvisno od ljudi. Zaposleni namreč upravljajo fizično lastnino, s čimer poskušajo ohraniti čim višjo raven njene začetne vrednosti, sočasno pa je ravno od sposobnosti, motivacije, ustvarjalnosti in veščin ljudi odvisno ohranjanje oz. povečevanje nematerialne lastnine (Mayo, 2001; Brečko, 2007). Cascio (1998) meni, da je tudi na ravni naroda oz. države ključni dejavnik konkurenčnosti količina veščin in vsota nakopičenega znanja delovne sile, saj tega dejavnika ni mogoče enostavno posnemati, v stvarnosti pa pogosto kaže nižjo raven mobilnosti od tehnologije (fizične), surovin, kapitala in informacij. Pološki-Vokić (2003) k temu poleg inteligentnosti delovne sile dodaja še lojalnost in delovni zagon. Dostopnost strojev in opreme torej ne more biti dejavnik diferenciacije v takšni meri, kot je to sposobnost njihove učinkovite rabe. Zato ne preseneča, da hitro okreva tisto podjetje, ki je ostalo brez strojev, a ohranilo veščine in znanje, česar ni možno pričakovati

od podjetja, ki je izgubilo usposobljeno delovno silo. Ravno tako so ljudje ključni dejavnik, ki odseva sposobnost prilagajanja organizacije na spremembe v okolju, saj lahko sprejemajo strateške in taktične odločitve. Samo ljudje lahko ustvarjajo nove proizvode, storitve in tehnologije. Ljudje so še vedno najbolj zanesljivi tudi pri identifikaciji družbenih sprememb v okolju in pomenijo tisti dejavnik, ki dejansko uvaja spremembe v organizacijo. Da so ljudje v vse večjem deležu organizacij edini dolgoročni vir konkurenčne prednosti, lahko potrdimo tudi s preverjanjem izpolnjevanja prej navedenih štirih temeljnih kriterijev vira konkurenčne prednosti:

1) Delo ljudi lahko ustvarja dodatno pozitivno vrednost v organizaciji. To izhaja iz dejstva nehomogenega povpraševanja po delu in ponudbe dela. Že znotraj ene organizacije je namreč treba opravljati različna dela, ki zahtevajo različno znanje in veščine. Ravno tako se posamezni ponudniki dela razlikujejo glede ponudbe lastnega znanja in veščin. Posledica tega je razlika v posameznih prispevkih k uspešnosti organizacije in tudi razlika v uspešnosti med organizacijami.

2) Znanje in veščine so lahko edinstveni ali vsaj dovolj redki, da lahko pomenijo razliko do konkurence. Tudi za potrjevanje te trditve je ključni argument heterogenost ponudbe veščin in znanja. Ob predpostavki normalne distribucije delovnega potenciala lahko sklepamo, da je kakovostna delovna sila redka dobrina.

3) Človeški potencial je težko posnemati, kar je pogosto posledica otežene identifikacije konkretnega človeškega znanja in veščin, ki omogočajo konkurenčno prednost. Še težji od identifikacije pa je prenos znanja in veščin na drugo osebo oz. na zaposlene v konkurenčni organizaciji. Iz tega izhaja tudi teza, da same odločitve vrhnjega managementa lahko ponujajo le kratkoročno konkurenčno prednost, ker je te odločitve lažje posnemati, zato naj bi bil vir konkurenčne prednosti lahko le celoten sklop znanja in veščin v podjetju (Wright, McMahan in McWilliams, 1994). Barney (1991) oteženo posnemanje utemeljuje s specifičnimi zgodovinskimi pogoji, ki jih ima točno določena organizacija. Konkurentom je namreč zelo težko posnemati način razvoja določene organizacije. Posledično je tudi težko vzpostaviti pogoje oz. specifično okolje, znotraj katerega se viri konkurenčne prednosti pojavijo. Sočasno je vzročno-posledična povezava med neotipljivimi viri, kot je na primer kultura organizacije, in konkurenčno prednostjo zamegljena oz. je tako kompleksna, da je na kratek rok njeno posnemanje nemogoče. Tretji dejavnik, ki preprečuje posnemanje, je kompleksnost družbenih pojavov, kar pomeni, da določenega družbenega konteksta ni mogoče prenesti iz ene organizacije v drugo, saj vodstva na to nimajo vedno možnosti vpliva.

4) Na dolgi rok človeškega potenciala ni možno nadomestiti z drugimi resursi. Pološki--Vokić (2003) to utemeljuje z dejstvom, da je človeško delo sicer na kratek rok zamenljivo s tehnologijo, vendar je ta dostopna vsem, ki imajo dovolj finančnih sredstev. Pri tem je treba poudariti, da v procesu alokacije kapitala slednji sledi redkemu znanju, zato se v končni fazi dve podjetji lahko razlikujeta le na podlagi znanja in veščin ljudi, ki tehnologijo uporabljajo.

Zdi se torej, da je ravno sposobnost organizacije pri spodbujanju učenja zaposlenih ključnega pomena za njeno konkurenčno prednost.

POLOŽAJ UČENJA MED ORGANIZACIJSKO STRATEGIJO IN USPEŠNOSTJO ORGANIZACIJE

V zadnjih 30 letih je bil narejen izjemen napredek v raziskovanju zveze med oblikami učenja, ki jih uporabljajo različni pristopi HRM, in organizacijsko uspešnostjo. Čeprav je v tem kontekstu nastalo več pojasnjevalnih modelov, večina avtorjev še vedno izpostavlja t. i. črno škatlo (»*black box*«), ki predstavlja prostor neznanih povezav in pravil, katerega razkrivanje bi lahko omogočilo pojasnjevanje vzročnih zvez. Becker in Gerhart (1996) sta zato v ospredje postavila pomen identifikacije neposrednih posledic učenja, ki vodijo do končne organizacijske uspešnosti. V tem kontekstu Boxall in Purcell (2000) trdita, da tudi posnemanje posameznih praks v drugem podjetju ne bo učinkovalo enako, če so v slednjem drugačne okoliščine kot v prvem. Zato je pomembno poudariti razlikovanje med ljudmi oz. človeškim kapitalom in procesi učenja v okviru dejavnosti HRM. Prvi posedujejo znanje in veščine, medtem ko izbrana oblika učenja lahko le pripomore k njihovi učinkovitejši rabi in spodbuja njihov nadaljnji razvoj. S pomočjo učenja pa se ne pridobivajo le znanje in veščine, temveč se ustvarjajo vedenjski vzorci in stališča, ki sooblikujejo pojave, kot sta kultura in klima, ki jih je praktično nemogoče posnemati. Na drugi strani učenje v okviru organizacije deluje tudi na človeški kapital, saj omogoča boljši izkoristek in pridobitev znanja, veščin ter razvoj talentov pri vseh članih organizacije, ne le tistih najbolj talentiranih. Kljub temu proučevanje vpliva učenja v organizacijskem kontekstu na uspešnost organizacije še vedno odpira številne dileme. Učinki na tej relaciji pogosto niso neposredni in so opazni šele na daljši rok. Pri tem se postavljata vprašanji, kako konkretizirati bistvo te povezave in katere druge dejavnike je treba vključiti v proučevanje.

Glede učenja v organizacijskem kontekstu HRM-literatura ponuja kar nekaj različnih pojasnjevalnih modelov. Še vedno sta najbolj znana t. i. michiganski in harvardski model. Prvi daje večji pomen notranjim dejavnikom uspešnosti, predvsem vlogi managementa. Tako na primer Likert (1967, v Pološki-Vokić, 2003) pri identifikaciji kritičnih dejavnikov učenja opredeljuje: 1) vedenje managerja, 2) organizacijsko strukturo in 3) vedenje podrejenih kolegov. Preostale dejavnike (percepcije, komuniciranje, motiviranje itd.) označuje kot posrednike oz. kot mediatorje med vzročnimi dejavniki in končnimi rezultati. Na drugi strani harvardski model upošteva širši kontekst, tudi okolje, na katerega vodstvo organizacije pogosto nima pomembnejšega vpliva. Iz tega izvira tudi razhajanje med univerzalističnim pristopom, ki domneva, da obstajajo določene »najboljše prakse«, ki jih je mogoče uporabiti v vseh organizacijah (Pfeffer, 1998), in situacijskim pristopom, ki izhaja iz domneve, da se morajo HRM-prakse in v okviru tega tudi učenje prilagajati danemu okolju (Van Waeyenberg in Decramer, 2018).

Proučevanje vzročno-posledične zveze med strategijo in uspešnostjo ter vloge, ki jo ima na tej relaciji učenje, se je poleg pojasnjevanja v okviru teorije boljšega pristopa k virom (*resource based view* – RBV) naslanjalo tudi na druge perspektive. Z vidika behavioristične teorije je naloga učenja v okviru HRM ne samo prenos znanja in pridobivanje veščin, temveč tudi uravnavanje stališč in vedenja zaposlenih, da bodo ta v skladu s strategijo in

načrtovano uspešnostjo (Schuler in Jackson, 1987). Procesi učenja imajo s te perspektive primarno nalogo oblikovati vedenjske lastnosti in vzorce zaposlenih (npr. ustvarjalnost, nagnjenost k sprejemanju večjega tveganja, povečevanje sodelovanja in prenašanja znanja itd.), medtem ko je manjši poudarek na izboljšanju njihovih veščin, povečanju znanja in sposobnosti. Behavioristični pogled predpostavlja, da vsaka strategija zahteva specifične vedenjske vzorce ter da načeloma ne obstajajo splošno bolj in splošno manj učinkovite prakse učenja v okviru celotnega spleta HRM, zato ima ta teorija svoje korenine v situacijski teoriji (Collins in Clark, 2003). Podobno kot RBV tudi ta pristop temelji na tezi, da je treba proučevati celotne sisteme in ne le posamezne prakse, pri čemer mora biti vsak sistem prilagojen potrebam posamezne organizacije. V kontekstu merjenja učinkov učenja daje ta šola večji poudarek behaviorist   čnim mediatorjem na skupinski oz. organizacijski ravni, ki naj bi imeli vlogo posrednika praks učenja v kontekstu procesov HRM h končni uspešnosti organizacije.

Institucionalni pristop, ki temelji na šoli industrijske organizacije, poudarja, da se organizacije soočajo z različnimi institucionalnimi ureditvami, ki imajo lahko zakonsko podlago ali pa jih narekujejo drugi kulturno pogojeni dejavniki. Starejši klasični institucionalni pristop izraža dvom glede možnosti vplivanja vodstva na uspešnost organizacije, medtem ko ima t. i. novi institucionalizem nekoliko manj tog pogled. Po slednjem se znotraj enega kulturnega okolja različne organizacije soočajo z izomorfičnimi silnicami, ki silijo organizacije k homogenizaciji (Dimaggio in Powell, 1983). Vodstva pri tem sprejemajo strategije in uravnavajo procese v organizaciji v skladu z zahtevami institucionalnega okolja. Do tega naj bi prihajalo tudi na področju učenja na delovnem mestu (Hasmath in Hsu, 2014). V tem kontekstu naj bi bila vloga učenja znotraj organizacije, ob upoštevanju institucionalnih silnic v obliki različnih regulativ in kulturnih značilnosti ljudi, prilagajati procese znotraj organizacije tako, da bodo na najlažji način doseženi želeni cilji. Teorija transakcijskih stroškov upošteva nekoliko drugačen vidik od institucionalnega pogleda, se pa tudi v tej učenje v okviru procesov HRM pojavlja v vlogi regulatorja. V nasprotju z institucionalnim pogledom pri teoriji transakcijskih stroškov sistem učenja zaposlenih ne skrbi za skladnost organizacijskih procesov z okoljskimi silnicami, temveč je njegova primarna naloga obvladovati konflikte v organizaciji. Procesi učenja imajo s tega vidika vlogo postavljanja nadzornih mehanizmov.

Celovit pogled na problematiko povezave med HRM in uspešnostjo sta z združevanjem RBV, institucionalnega, behaviorističnega in kibernetičnega pristopa ter teorije transakcijskih stroškov poskušala sestaviti Wright in McMahan (1992). Njun model vpliva zunanjih institucionalnih dejavnikov in organizacijske strategije na procese učenja v okviru politik in praks HRM ter posledično učinkovanje na vrednost človeškega kapitala in spremembe vedenja zaposlenih prikazuje Slika 1. Razvidno je, da sta omenjena avtorja nekoliko bolj naklonjena behaviorističnemu stališču, po katerem mora vodstvo organizacije težiti k usklajenosti med strategijo in učenjem v sklopu aktivnosti HRM.

Slika 1: Strateški kontekst učenja odraslih na delovnem mestu
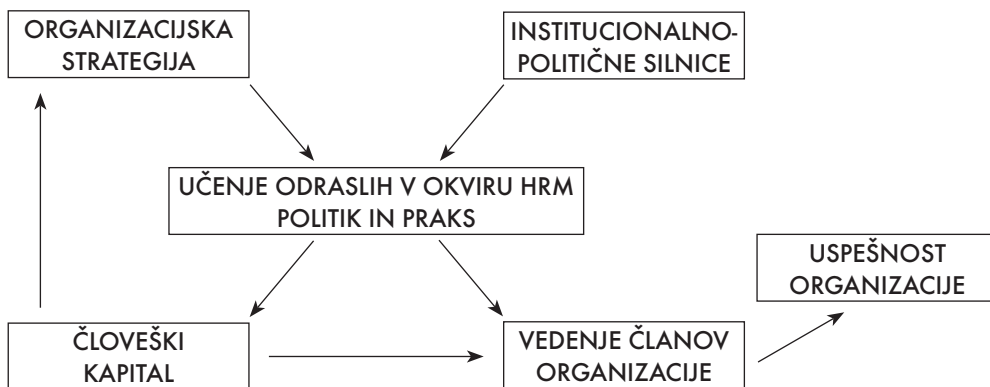
Vir: prilagojeno po Wright in McMahan, 1992, str. 299.

Paauwe in Boselie (2003) sta poskušala narediti sintezo institucionalnega in RBV-pristopa, kar sta podkrepila z empiričnimi dokazi povezanosti treh ravni organizacijskega okolja, in sicer mednarodnega, sektorskega in organizacijskega. Pri tem jima je uspelo pokazati, kako se razlike na treh ravneh organizacijskega okolja izražajo v končnem oblikovanju praks učenja. S tem sta združila *inside-out* RBV-pristop in *outside-in* institucionalni model strateškega managementa. Paauwejeva (2004) teza je, da sta možnost strateškega izbiranja s strani vodstva in posledični manevrski prostor za oblikovanje načrtov učenja v kontekstu sistemov HRM omejena s tremi kontekstualnimi sklopi. V prvi vrsti je to narava produkta oz. trga, na katerem produkt nastopa. Gre za procese, ki opredeljujejo, kako se določen proizvod ali storitev naredi, kako se pride do virov za produkcijo, in specifike, ki obstajajo pri prodaji in uporabi produkta. Drugi sklop dejavnikov se nahaja znotraj organizacije. Tradicija delovanja namreč postavlja vodstvu določene omejitve, zunaj katerih je praktično nemogoče delovati, če so ti dejavniki globoko ukoreninjeni v člane organizacije in so postali del organizacijske kulture. Tretji sklop v Paauwejevem modelu sestavljajo institucionalni mehanizmi, ki vključujejo družbeno, kulturno in pravno komponento, ki vodstvom organizacij postavljajo meje mogočega pri njihovem odločanju. Pri celovitih pristopih lahko opazimo tezo, da koncept najboljših praks in situacijski pristop nista izključujoča. Razlike v razumevanju delovanja zveze učenje na delovnem mestu–uspešnost, vsaj v kontekstu strateškega HRM, torej vendarle niso tako velike, kot se morda zdi na prvi pogled.

KAJ MERITI NA ORGANIZACIJSKI RAVNI

Konceptualne razlike pri opredeljevanju učenja odraslih pri delu in posledično tudi pri razumevanju delovanja teh sistemov ter njihovega učinkovanja na uspešnost organizacije so opazne tudi na področju metod raziskovanja oz. načinov merjenja učinkov učenja v okviru politik HRM. V literaturi lahko opazimo številne dileme, kako konkretno meriti sisteme. Najprej se seveda izpostavlja problem, kaj sploh je končni rezultat, ki naj bi ga proces učenja

dosegel, in s katerimi kazalniki lahko ta končni učinek prikažemo (Bajec, Boštjančič in Tement, 2016). Rejc (2001) poudarja, da je sicer vsak učinek mogoče meriti s stroški, časom, kakovostjo, količino in zadovoljstvom, a se pri vprašanju kazalnikov pogosto omenja razlika med tradicionalnim in sodobnim oz. finančnim in nefinančnim merjenjem uspešnosti.

Na organizacijski ravni pri profitnih organizacijah še vedno prevladuje t. i. tradicionalno merjenje uspešnosti. Slednje v ospredje postavlja finančni vidik poslovanja, pri čemer sta ključni merili uspeha dobičkonosnost kapitala (ROE) in dobičkonosnost sredstev (ROA). Prvi je predvsem pomembno merilo uspeha za lastnike, medtem ko drugi vključuje pogled na uspešnost uporabljanja vsega, kar ima organizacija na razpolago. Čater (2003) kot finančna merila uspeha navaja tista, ki so izračunana na podlagi denarno izraženih ekonomskih kategorij, predvsem tista, ki so zajeta v temeljnih računovodskih izkazih in jih lahko razdelimo v tri skupine: tradicionalni kazalniki (ROA, ROE), finančni kazalniki razvitih trgov kapitala (rast tržne vrednosti enote kapitala, razmerje med tržno in knjigovodsko vrednostjo kapitala, dobiček na delnico, cenovno-profitno razmerje, dividende, ekonomska dodana vrednost) in finančni kazalniki denarnega toka (stabilnost denarnega toka, razpoložljiv denar itd.). Med finančne kazalnike lahko prištevamo tudi nekatera druga merila, kot so rast prodaje, dodana vrednost na zaposlenega itd. Težava pri teh kazalnikih izhaja iz dejstva, da večinoma temeljijo na prilagodljivi ekonomski kategoriji »dobička«, zato pogosto prikažejo samo posledice, ne pripomorejo pa k ugotavljanju vzrokov. Obenem ne pripomorejo k spremembi managementa s ciljem odpravljanja problemov, saj sporočajo informacije s časovnim odmikom in ne omogočajo pravočasnih ukrepov (Lothian, 1987). Ravno tako ne upoštevajo, da niso vsi deležniki zainteresirani za maksimiziranje dobička.

Zaradi pomanjkljivosti tradicionalnega dojemanja se je razvilo novo pojmovanje uspešnosti, ki upošteva širši krog različnih interesov, ki naj bi jih organizacija zadovoljevala. Deležniki naj bi bili vsi tisti posamezniki in skupine, ki imajo do organizacije legitimne zahteve, ali pa so prizadeti zaradi njenega delovanja (Donaldson in Preston, 1995). Ker finančni kazalniki sami po sebi ne morejo prikazati koristi vseh udeležencev, tudi če govorimo o profitni organizaciji, se je na teoretični ravni razvila razprava o podpornih merilih uspeha, ki dopolnjujejo finančna merila in izražajo druge vidike uspešnosti (npr. rast, učinkovitost notranjih procesov in vidik kupca) (Kaplan in Norton, 1996). S pomočjo nefinančnih meril je torej mogoča globinska kvalitativna analiza posamezne organizacije in posledično lažje zasledovanje vseh namenov, ki jih opredeljuje organizacijsko poslanstvo. Nefinančni kazalniki so lahko rezultati poslovanja ali pa nefinančni kazalniki dejavnikov, ki vplivajo na končne učinke. Slednji ocenjujejo raven, na kateri se v posamezni organizaciji nahajajo ključni dejavniki uspeha, in so nekakšni znanilci prihodnje uspešnosti.

OPREDELJEVANJE PODROČJA MERJENJA

V HRM-literaturi še več dilem lahko zaznamo pri vprašanjih, kako opredeliti in spremljati dogajanja ter učinke učenja v okviru HRM na uspešnost (Bondarouk, Trullen in Valverde, 2016; Jiang, Lepak, Hu in Baer, 2012; Woodrow in Guest, 2014). Medtem ko so se

nekateri osredotočali na učinkovitost izvajanja praks učenja v kadrovskih oddelkih (Teo, 2002), so drugi več pozornosti namenjali razvoju človeškega potenciala in povečevanju vrednosti človeškega kapitala, ki so ga merili prek znanja, veščin in drugih kompetenc članov neke organizacije (Hitt idr., 2001). Do razhajanj prihaja tudi med posamezniki znotraj iste struje. Nekateri namreč menijo, da je učenje v organizacijskem kontekstu treba proučevati globinsko, in sicer prek analize posameznih praks učenja in njihovega prispevka k uspešnosti organizacije (Batt, 2002), medtem ko drugi prisegajo na proučevanje celotnih kompleksov praks učenja, saj naj bi bile te ključni elementi poslovnega procesa (Cappelli in Neumark, 2001). Danes nekoliko prevladuje slednje, saj posamezne prakse lahko ob skupnem delovanju z drugimi povzročajo pozitivne sinergijske učinke, sočasno pa lahko v primeru neusklajenosti govorimo o t. i. smrtonosnih kombinacijah, ko ena aktivnost učenja zmanjšuje vrednost drugi. Ravno zato analiza vpliva posamičnih praks na organizacijo ne more pokazati prave vrednosti skupka praks niti dati pojasnila, kako so te prakse povezane s strategijami. Številni avtorji (npr. Snell, Shadur in Wright, 2002) zato trdijo, da je logika povezovanja aktivnosti učenja veliko pomembnejša za razumevanje strategije HRM od samih aktivnosti, medtem ko je analiza posameznih praks učenja lahko le dodatno orodje pri diagnozi in odpravljanju morebitnih težav v sistemih HRM.

Do razlik ne prihaja le pri opredeljevanju predmeta merjenja, še bolj živa se zdi razprava na področju določanja učinkov, ki jih učenje povzroča na organizacijski ravni. Raziskovalci so se sprva zadovoljevali z enostavnim izračunom korelacije med določeno prakso učenja in finančno uspešnostjo podjetja. Vendar ta tehnika žal le potrdi ali ovrže obstoj zveze med uspešnostjo in konkretnim načinom učenja, ne pojasni pa, ali obstaja neposredna vzročnost v tej povezavi. Tudi ne pojasni smeri njenega delovanja. Posledično so se pojavile dileme, ali izvajanje učenja vpliva na uspešnost ali pa uspešnost organizacije v večji meri vpliva na način učenja. Tako je Kravetz (1988) trdil, da je narava procesov učenja v okviru HRM odvisna od finančne uspešnosti podjetja. Organizacije, ki imajo več finančnih presežkov, naj bi si namreč lažje privoščile večja vlaganja v zaposlene ter naj bi ravno tako lahko oblikovanju tega procesa namenile več časa in znanja specialistov. Večina sicer še vedno umešča učenje med vzroke in (ne)uspešnost organizacije opredeljuje kot posledico izvajanja učenja. Deloma je to posledica poteka samega poslovnega procesa, v katerem se najprej določi narava učenja, šele nato se spremlja učinkovitost. Vendar se del te argumentacije skriva tudi v domnevi, da uspešne organizacije ne težijo k spreminjanju dosedanjih praks. Torej naj bi morebitni neuspeh pomenil močnejšo spodbudo za spremembe poteka poslovnega procesa, med drugim tudi vrste učenja. Čeprav so določene raziskave potrdile obstoj povratne vzročnosti (npr. Locke in Latham, 2002), obstaja še vedno kar nekaj skepticizma. Nekatere aktivnosti so sicer bolj dovzetne za povečanje finančnih sredstev (npr. količina in kakovost treninga), vendar na številne dejavnike (npr. kultura in klima) ni možno enostavno vplivati s povečevanjem denarja v organizaciji (Kravetz, 1988). Pološki-Vokić (2003) zato meni, da uspešnost organizacije ne vodi nujno tudi k večjemu interesu za zaposlene s strani vodstva organizacije, enako tudi narava učenja ni izključno posledica povečanega priliva sredstev v organizacijo.

Pri proučevanju vzročne povezave med učenjem znotraj organizacije in organizacijsko uspešnostjo se pogosto postavlja vprašanje, na kateri ravni meriti učinke učenja. Dyer in Reeves (1995) sta razdelila učinke na neposredni vpliv na človeški potencial (vedenjske spremembe, kot so zadovoljstvo, predanost itd.), rezultate na ravni organizacije (produktivnost, kakovost, ekonomičnost itd.) in finančne rezultate (dobiček, tržni delež, rast prihodkov itd.). Pri tem pa se postavlja kar nekaj dodatnih vprašanj, in sicer:

1) ali naj se učinki učenja spremljajo le na ravni razvoja potenciala in posledičnega povečevanja človeškega kapitala v organizaciji (prek povečevanja znanja, veščin in preostalih kompetenc);
2) ali naj se spremljajo tudi neposredni učinki na vedenje članov organizacije;
3) ali je smiselno povezovati prakse učenja s končnimi učinki, ki jih spremljamo v zadnji fazi poslovnega procesa.

Naštete dileme prihajajo do izraza predvsem v neprofitnih organizacijah, kjer sprememba finančnega stanja ali tržne vrednosti ne more biti najpomembnejše merilo uspeha organizacije. Nadaljnja težava je odmik med načrtovanim sistemom HRM na strateški ravni, dejansko izvedbo praks učenja in zaznavo teh aktivnosti pri zaposlenih. Ta odmik lahko povzroči, da tri raziskave znotraj iste organizacije pridejo do treh povsem različnih sklepov glede učinkov učenja na organizacijsko uspešnost. Do podobnega problema prihaja tudi zaradi časovne neusklajenosti spremljanja učinkov učenja. Prakse učenja so namreč pri večini študij opazovane v istem časovnem trenutku kot učinki (Paauwe in Boselie, 2008). S tem je kršeno eno izmed temeljnih načel ugotavljanja vzročno-posledične zveze, po katerem je posledice treba proučevati s časovnim odmikom od proučevanja dejavnikov, za katere predvidevamo, da so vzroki. Prav zaradi navedenih težav obstaja tudi določen dvom o povezavi med načinom učenja in uspešnostjo organizacije, a kljub temu prevladuje prepričanje, da so učinki učenja v kontekstu procesov HRM poleg neposrednih vplivov na vedenje članov organizacije večinoma posredni in se manifestirajo na različne načine na ravni celotne organizacije ter da je zato nujno učinke učenja ocenjevati večplastno.

S ciljem razumevanja in posledično lažjega spremljanja učinkov učenja sta Wright in Nishii (2004) pojasnila sam proces strateškega HRM in psihološke posledice, ki pomenijo posredni dejavnik med učenjem v kontekstu HRM in uspešnostjo. Avtorja sta namreč jasno razlikovala nameravani in uresničeni sistem ter dodala tretji konstrukt, zaznavanje dejanskega sistema, ki nato povzroča reakcije zaposlenih, ki lahko pripomorejo k organizacijski uspešnosti. Poudarjata, da je pri spremljanju učinkov praks učenja potrebna skupinska raven analize, medtem ko je za ocenjevanje psiholoških konstruktov percepcij in reakcij nujno potrebna analiza na individualni ravni. Boselie, Dietz in Boon (2005) so prek obširnega pregleda literature ugotovili, da so obravnave zveze med HRM in uspešnostjo doslej potekale znotraj treh različnih pogledov, in sicer situacijske teorije ter pristopov RBV in AMO (*ability, motivation and opportunity to participate*). Prav tako je bilo ugotovljeno, da so zaradi različnih kontekstov in teoretičnih konceptov tudi rezultati študij, ki so proučevale neposredne posledice učenja, pogosto vodili do nasprotujočih si sklepov (Lepak, Liao, Chung in Harden, 2006). Posledično nikakor ne moremo trditi, da

obsežen nabor literature in empiričnih preverb pomeni, da raziskave na področju učinkov učenja znotraj organizacije na organizacijsko uspešnost niso več potrebne. Posebej to velja, če se zavedamo, da je bila večina teh študij izvedena v Združenih državah Amerike in Veliki Britaniji, bistveno manj pa je prispevkov iz evropskih, predvsem posttranzicijskih držav.

Ob tezi, da večja uspešnost organizacije izhaja iz usklajenosti organizacijske strategije in sistema HRM, obstajajo tudi alternativni pogledi na problematiko »črne škatle«. Den Hartog, Boselie in Paauwe (2004) menijo, da so dokazi o zvezi med poslovno strategijo in HRM na eni strani ter med strategijo HRM in praksami učenja na drugi še vedno precej šibki. Po njihovem mnenju naj bi bilo spremljanje in nagrajevanje uspešnosti večinoma v domeni srednjih oz. linijskih managerjev, zato ravno ravnanje slednjih najbolj določa zaznave zaposlenih o praksah učenja v organizaciji. Paauwe in Boselie (2008) kot razloge za to navajata togost pri opredeljevanju organizacijskih strategij, pri čemer avtorji pogosto ne upoštevajo možnosti hibridnih strategij, ki jih ni mogoče enostavno uvrstiti v delitev diferenciacija/nizki stroški/nišni fokus. Empirično preverjanje povezave med strategijo, sistemom HRM, učenjem in uspešnostjo organizacije je oteženo tudi zaradi relativno dolgega obdobja, ki je potrebno, da se sprememba na strateški ravni pozna v končni uspešnosti. Z večjo statistično veljavo je na drugi strani potrjena vzročno-posledična zveza med praksami učenja in posrednimi dejavniki uspešnosti (npr. produktivnost) (Lepak in Snell, 2002). Ravno ločevanje med neposrednimi in posrednimi posledicami, pri katerih je treba najprej identificirati posrednike učinkov, se zdi ključnega pomena za proučevanje posledic učenja. Pri tem je izrednega pomena ločevanje med merjenjem na organizacijski, skupinski in individualni ravni ter kombiniranje konstruktov, ki izhajajo s perspektive teorij, utemeljenih na znanju, in tistih nekoliko bolj tradicionalnih, ki se fokusirajo na merjenje psiholoških konstruktov.

SKLEPI

Prispevek prikazuje dileme spremljanja učinkovanja učenja na organizacijsko uspešnost in obenem opisuje glavne dileme, ki se pri tem postavljajo pred raziskovalce. Posledica kompleksnosti spremljanja seveda ne obstaja le na znanstveni ravni, ampak številne težave povzroča tudi v praksi. Stereotipi, da nekaterih procesov učenja ni možno meriti ali kvantificirati, povzročajo problem, ker si managerji ne predstavljajo, koliko koristi jim lahko prinese uvedba določene aktivnosti. Strah pred merjenjem učinkov učenja ni redek, saj vodstva podjetij težko določijo fokus spremljanja, še težje pa je v praksi ustvarjati vzdušje, ki bi bilo temu naklonjeno. Vzroki za to se pogosto skrivajo tudi v nejasnem postavljanju ciljev, kar se neredko konča z izbiro najbolj oportune poti, pri kateri se pogosto uporabljajo nezanesljivi viri in metode obdelave pridobljenih podatkov. Res je, da se v praksi lahko zgodi, da spremljanje ni mogoče zaradi pomanjkanja časa ali sredstev, vendar je to zelo pogosto tudi najbolj uporaben izgovor odgovornih za izmikanje nekoliko zahtevnejšemu delu. Na dolgi rok je spremljanje nujno, ker:

1) zaposlenim pokaže, katera so pomembna vprašanja, ki se nanašajo na njihovo delo, saj sistemi merjenja omogočajo ločevanje nalog na pomembnejše in tiste nekoliko manj pomembne;

2) pojasnjuje pričakovanja vodstva, saj je nujno postavljanje ciljev in standardov, opredeljenih s stroški, časom, kakovostjo, količino in zadovoljstvom odjemalca, tako da zaposlenim na jasen način opredeli zaželeno vedenje;

3) motivira in spodbuja kreativnost – organizacije sisteme spremljanja uvajajo ravno zaradi želje po povečanju uspešnosti, kar je posledica omogočanja povratnih informacij vsem zaposlenim, ki nato stremijo k izboljšanju svojih dosežkov;

4) olajša administracijo in preverjanje upravičenosti odločitev.

Sama utemeljitev potrebnosti spremljanja učinkov učenja še ne odpravlja številnih dilem. Slednje lahko v določeni meri zmanjšamo, če se držimo nekaterih smernic:

1) Poznati je treba kontekst organizacije, v kateri spremljamo učinke učenja. Treba je poznati cilje organizacije, da lahko (ne)uspešnost sploh izrazimo. Nato pa je potrebno tudi okvirno poznavanje produkcijskega procesa, saj je večina učinkov učenja posrednih in jih običajno lažje ocenjujemo na vmesnih točkah tega procesa.

2) Učinke učenja je treba proučevati večdimenzionalno. To implicira proučevanje učinkovanja učenja na organizacijo z več vidikov, kar zajema okoljske, organizacijske in individualne dejavnike ter posledično vključuje upoštevanje različnih teoretičnih izhodišč.

3) Učinke učenja je treba proučevati na več ravneh. To pomeni izogibanje študijam, ki upoštevajo le en vir informacij, in implicira proučevanje tako nameravanega kot uresničenega stanja po učenju. Pri tem je priporočljivo zajeti mnenja načrtovalcev, izvajalcev in tistih članov organizacije, na katere se določeni procesi učenja nanašajo.

4) Ohraniti je treba enostavnost izvedbe empiričnega preverjanja in razumljivost ugotovitev. Bistvenega pomena za vsako raziskovalno delo je njegova razumljivost, in sicer tako s procesnega kot vsebinskega vidika. Posledično je treba omejiti število dejavnikov, ki jih proučujemo, obenem pa se izogibati mešanju nezdružljivih metod.

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PRESCHOOL TEACHERS' INVOLVEMENT IN INFORMAL LEARNING AS AN IMPORTANT FACTOR OF THEIR PROFESSIONAL DEVELOPMENT

ABSTRACT

Every preschool teacher's activity results in changes in the preschool teacher as well as in the practice. In situations where we have a limited number and form of professional training offered to preschool teachers, whose attendance is not always subject to the personal plan of preschool teachers' professional development, informal learning adds great value to teacher development. This paper aims to examine the involvement of preschool teachers in certain forms of informal learning and their reflection on the impact these forms have on their professional development. The empirical part of the paper presents the results of a survey conducted among preschool teachers. 110 preschool teachers from the Republic of Croatia responded to the questionnaire and we got answers to two research questions. The results show that preschool teachers are most often involved in a form of informal learning which includes agreeing on how to work with a colleague from the group and documenting the children's activities.

Keywords: *informal learning, preschool teachers, professional development*

VKLJUČENOST VZGOJITELJEV PREDŠOLSKIH OTROK V INFORMALNO UČENJE KOT POMEMBEN DEJAVNIK NJIHOVEGA PROFESIONALNEGA RAZVOJA – POVZETEK

Vsaka aktivnost vzgojiteljev predšolskih otrok spreminja tako posameznega vzgojitelja kot prakso v vrtcu. V razmerah, ko smo omejeni tako pri številu kot obliki strokovnih usposabljanj predšolskih vzgojiteljev, katerih udeležba v njih tudi ni vedno odvisna od osebnega načrta poklicnega razvoja vzgojiteljev v vrtcu, ima informalno učenje velik pomen za razvoj vzgojiteljev. Namen prispevka je raziskati vključenost

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vzgojiteljev predšolskih otrok v nekatere oblike informalnega učenja in njihov razmislek o vplivu teh oblik na njihov profesionalni razvoj. V empiričnem delu prispevka so predstavljeni rezultati ankete med 110 vzgojitelji predšolskih otrok v Republiki Hrvaški. Na podlagi vprašalnika smo dobili odgovore na dve raziskovalni vprašanji. Rezultati kažejo, da so predšolski vzgojitelji najpogosteje vključeni v informalno učenje, ki zajema dogovor o tem, kako sodelovati s kolegom iz skupine, in dokumentiranje otrokovih dejavnosti.

Ključne besede: *informalno učenje, vzgojitelji predšolskih otrok, profesionalni razvoj*

INTRODUCTION

Today a preschool teacher faces extreme pressures from society's expectations and educational policy (Lohman, 2006). Current times and the new paradigm of early and preschool education (Broström, 2006; Slunjski, 2014) have brought changes to the role of preschool teachers as professionals, with continuous professional development and lifelong learning becoming an imperative of the educational profession. Therefore, it is important to determine the real situation in all domains of the professional development of preschool teachers. This paper is based on informal forms of learning, which are less represented in the field of research but are of great importance in the life of teachers, primarily because of the motivational aspect, accessibility, and the individual approach. The theoretical part will provide an overview of definitions, the position of informal learning in professional development, and consideration of various forms of informal learning. The empirical part, results, and discussion provide insight into the frequency and effectiveness of various forms of informal learning in the preschool teacher's life.

THE POSITION AND THE ROLE OF INFORMAL LEARNING IN THE PROFESSIONAL DEVELOPMENT OF PRESCHOOL TEACHERS

A competent modern preschool teacher is characterised by continuous work on himself/ herself in the personal and professional sense, the acquisition of new knowledge and skills needed in their work, the integration of new with already existing knowledge, and their exploration in practice, all of which is accompanied by changes in individual beliefs and, consequently, actions (Vujičić, 2011; Slunjski, 2014). Today's preschool teacher recognizes the importance of questioning his/her own beliefs, experiences, and daily actions (Muraja, 2012), which makes the teacher a researcher of his/her own practice, a theorist in action, a reflective practitioner, an initiator of change, and a professional who continuously works on his/her own personal and professional development.

Many sources (Blanuša Trošelj, 2018; Lawless & Pellegrino, 2007; Piasta et al., 2012) emphasize that the key to the development of a competent practitioner is continuous professional development. In order to constantly adapt to innovations and improve and acquire new knowledge and competencies in accordance with the needs of contemporary society and the profession, continuous professional development and lifelong

learning are an obligation, right, and responsibility of every preschool teacher. Professional development is a lifelong process and includes the development of personal, professional, and social dimensions, changes in one's attitudes and understanding, which influences changes in practice (Valenčič Zuljan, 2001). Professional development is an internal process and should be independent of constraints such as finances and time; it should be voluntary and continuous. The constant of professional development is precisely the development itself, which means that it respects, expands, and complements existing knowledge and competencies. The result of professional development is personal change, i.e., growth and development in the personal and professional sense. The responsibility of each individual for his/her own professional development, therefore, should be entirely on him/her (Horvatić, 2018). What one is made aware of and learns about his/her own actions never disappears from such actions (Sagor, 2000). For what has been learned to be applicable, development must not be reduced to the cognitive level but should also include emotional and psychomotor components (Žorga, 1999). Fortunately, today's preschool teachers increasingly recognise the multidimensionality and importance of their own professional development (Blanuša Trošelj, 2018; Valenčič Zuljan & Blanuša Trošelj, 2014) and are becoming critical in their expectations, reflections, and application of various forms of professional development. Thus, they are becoming active creators of educational policies at all levels. Interestingly, although the effectiveness of professional development is recognised in practice, its adequacy is still questioned in the context of meeting teachers' learning needs (Lawless & Pellegrino, 2007).

Professional development itself can be formal, non-formal, and informal. The paradigm according to which initial education gives knowledge to an individual for their entire career has long been abandoned (Marentič Požarnik, 1987; Valenčič Zuljan, 1999). Today initial education is seen as a formal form of development, which is only the initial, fundamental point in an individual's development. Given the rapid changes in scientific and technological fields, and the inability to anticipate all the needs of a society in the educational context of the future, initial education should focus on the development of the basic system of knowledge and values of the individual. Among them are the importance of critical thinking, resilience, and the competency to learn how to learn.

In the educational profession non-formal learning is most often incorporated into forms of professional development (professional meetings, lectures, workshops, seminars, training, conferences). This form of learning is often imposed, the topics do not necessarily follow the interest of individuals; it is limited in time, financially, and geographically, and is not available to all preschool teachers (Blanuša Trošelj, 2018). But in the event that preschool teachers are given free choice, some will often choose those forms of professional training that are associated with pleasure and entertainment, or those that do not require the questioning and changing of the ways of thinking and practice (Slunjski, 2016). However, the real situation indicates the limited number and form of professional training offered to preschool teachers, whose attendance is not subject to the personal

plan of preschool teachers' professional development but rather to spontaneous selection and compliance with legal requirements (Blanuša Trošelj, 2018). Given the description of the contemporary competent professional and the numerous new preschool teacher roles, many authors emphasize the importance of forms of professional development with transformational potential (Hawley, 2002, as cited in Fatović, 2016). These include those forms of learning that lead not only to changes in knowledge, but also to changes in the mental models of preschool teachers or their implicit pedagogies, i.e., values, beliefs, and attitudes.

In the contemporary context, an organisation that nurtures the professional development of its members is actually a learning organisation, and learning is carried out at the level of the institution, group, and individual (Marsick & Watkins, 2001; Štemberger & Vesel, 2016), not excluding any level of action and development. Yet the literature extensively explores action at the institution level, although the individual level is recognised as crucial and fundamental (Berg & Chyung, 2008). A significant part of development at the individual level is accounted for by informal learning (Krajnc, 2008), although, indirectly, both signify well-being at the organisational level.

Lohman (2006) discusses three forms of informal learning connected to the school context: knowledge sharing, experimentation, and environmental research. Some authors view informal learning from the prism of collaborative learning, while the kind of learning that does not involve sharing with colleagues is called independent, self-directed learning (Jones & Dexter, 2014).

Informal learning can also be viewed as unstructured, spontaneous learning in the workplace that does not have systemic support, and which contributes to changes in knowledge and/or behaviour (Grosemans, Boon, Verclairen, Dochy, & Kyndt, 2015). The authors divide the activities of teachers' informal learning into reflection, learning from others without direct interaction, experimentation or learning through work, and learning from others through interaction. Informal learning is sometimes viewed in the context of all those types of learning that do not take place in a structured form and classroom setting. According to OECD research (2009), it is dialogue that is in the function of the progress of educational work and the most effective method of teachers' professional development. The importance of dialogue for professional development and the resilience of the individual has been confirmed by other research (Day, Sammons, Stobart, Kington, & Gu, 2007; Valenčič Zuljan, 2008). Especially important is informal conversation between novice preschool teachers and mentors (Krajnc, 2006), who, depending on the emotional and professional engagement, often become key people in the professional development of the individual (Blanuša Trošelj, 2018; Valenčič Zuljan & Vogrinc, 2005). On the other hand, among the indirect forms, Neil and Morgan (2003) identify the importance of reading and networking in the professional development of teachers. Informal learning includes several elements of the effectiveness of professional development. Among other things, the possibility of coordination with other activities does not take additional time, i.e., it adapts to the pace of the individual

and responds to his/her needs and the organisation in which he/she operates (Jones & Dexter, 2014).

Informal learning is both the most accessible and the cheapest form of development (Neil & Morgan, 2003). Although it is a form that is the least exclusionary on the basis of geographical location, the level of professional development, size of the institution in which one works, support from a professional service, and so on, it is clear that there may be a difference in the availability of resources. On the other hand, it is important to consider the limitations of such a form since, for example, the Internet often includes questionable data and sources (O'Hara & O'Hara, 2001), and reading excludes interaction with people so that the interpretation of what has been read depends solely on one person and his/ her attitudes and knowledge (Neil & Morgan, 2003). In order for the informal learning and professional development of an individual to be effective both initial education and shaping the learning community are important.

Very little empirical research has attempted to connect individual learning to the concept of a learning organisation. Berg and Chyung (2008) investigated the factors that influence informal learning in the workplace and the types of informal learning activities people engage in at work. More specifically, the research examined the relationship between informal learning engagement and the presence of learning organisation characteristics and perceived factors that affect informal learning engagement. On a sample of 125 participants, the study did not find a significant correlation between informal learning engagement and the presence of learning organisation characteristics. While age and education level did not impact informal learning engagement, it was found that older workers tended to engage in more informal learning. The authors conclude that the tacit nature of informal learning makes it a challenging subject to study. It is often so embedded into daily activities that individuals are unable to recognise their informal learning retrospectively.

The Project LiNEA (Learning in Nursing, Engineering, and Accountancy), a longitudinal study of professional accountants, engineers, and nurses during their first three years of full-time employment, found that learning in the workplace was enhanced by improving opportunities for productive engagement in a wide range of work processes (Teaching and Learning Research Program, 2004, 2007, as cited in Vaughan, 2008). Vaughan (2008) highlights that

> [a]lthough many of the activities were tacit and difficult to explain, working in groups with people who had different kinds and levels of expertise seemed to help everyone understand the nature of that expertise and make better use of it in their own roles. Thus participants' commitment to their work, their colleagues, and their employers was affected by the quality of support and feedback they received, the appreciation of value of their work and personal sense of action and control. (p. 17)

METHOD

The paper aims to examine the involvement of preschool teachers in certain forms of informal learning and their reflection on the impact of these forms on their professional development.

Based on this, two research questions were singled out:

Q1: How often do the surveyed preschool teachers use certain forms of informal learning?

Q2: How do the surveyed preschool teachers assess the effectiveness of a particular form of informal learning in their professional development and do the surveyed preschool teachers differ in terms of some sociodemographic characteristics (work experience, level of education, involvement in learning communities)?

Data Procedures

The research was conducted in the period from June to August 2019. Data was processed using the SPSS statistical software package (version 22.0.). Measures of descriptive statistics were used to check the differences between participants' involvement in different forms of informal learning. A one-way analysis of variance and Bonferroni's post hoc test are applied to examine whether there are differences in the involvement and effectiveness of informal learning according to the level of study, and work experience, and in cases where the prerequisites are not met (Levene's test), the nonparametric tests Kruskal-Wallis and Mann-Whitney were used. To check the differences between participants according to the field of study, a t-test is applied to examine whether there are differences in the involvement and effectiveness of informal learning according to the preschool teachers' involvement in learning communities.

Sample of Participants

110 preschool teachers from the cities of Rijeka, Opatija, and Kostrena, Republic of Croatia, participated in the research. Of the total number of participants, 99.1% are female. The participants' average length of service is 13.94 years. The range of years of service is from 2 months to 43 years. Four preschool teachers have completed high school (3.6%), 47 undergraduate professional studies (42.7%), 31 undergraduate university studies (28.2%), while 28 preschool teachers have completed graduate studies (25.5%). Of the total number of participants, 60 (54.5%) are included in learning communities, while 50 of them (45.5%) are not.

Questionnaire

A questionnaire comprising of three parts was constructed based on previous research in the field of the informal professional development of preschool teachers and contemporary theoretical knowledge. The first part of the questionnaire contains socio-demographic data on the participants, preschool teachers' work experience, whether they currently work with a group of children up to 3 years or over 3 years of age, involvement in learning

communities, and the level of education. For the purposes of the analysis, the length of service reported by the preschool teachers was divided into three groups. The first group consists of preschool teachers with up to 4 years of work experience, which in principle corresponds to the categories of novice preschool teachers and the first year of a reflective preschool teacher according to the model of professional development (Blanuša Trošelj, 2018). The second category includes preschool teachers with between 5 and 15 years of work experience, i.e., the reflective preschool teacher and advanced preschool teacher, while the third category, with over 16 years of work experience, includes the routine preschool teacher, expert preschool teacher, and veteran preschool teacher, according to Blanuša Trošelj (2018).

The second part of the questionnaire comprises of a scale consisting of 18 items on which the preschool teachers assess how often they perform certain informal learning activities (Table 1). A 5-points Likert scale of frequency of use, ranging from 1 (never used) to 5 (used several times a week), was used to carry out the assessment.

The third part of the questionnaire consists of a scale with the same 18 items but in which preschool teachers assess the effectiveness of informal activities in their professional development. A 5-point Likert scale of effectiveness was used for the assessment, ranging from 1 (not at all) to 5 (greatly effective).

Based on the content and theoretical concept introduced in the theoretical part of this work, we divided the items of the effectiveness of the informal forms of activities in the professional development of preschool teachers into three groups.

The first factor includes the items concerning those forms of informal learning that are often an unconscious contribution to preschool teachers' professional development and include the exchange and sharing of experiences, opinions and materials with preschool teachers who an individual directly interacts with on a daily basis, and we called it *Direct agreement and exchange of experiences*. Cronbach Alpha is 0.830. It consists of six items: *Agreeing on how to work with a colleague from the group, Talking to colleagues about problems from practice, Joint preparation for work with a colleague from the group, Exchanging ideas with colleagues on improving the practice, Using social networks to exchange ideas from practice,* and *Sharing incentives and materials with colleagues.*

The second factor includes seven items that describe the application of reflective competencies in order to contribute to the improvement of practice and is therefore called *Reflective practice*. Cronbach's Alpha for this factor is 0.775. It consists of the following items: *Conducting reflections with colleagues on their educational work, seeking feedback, Observing colleagues and giving feedback on their educational work, Documenting children's activities, Analysing the collected documentation on children's activities, Experimenting with new work methods,* and *Self-reflection on one's own educational work*.

The factor *Learning from others* consists of five items that include different forms of informal learning in which preschool teachers develop their competencies from direct

or indirect forms of learning from others. Cronbach's Alpha for this factor is 0.703. This factor consists of the following items: *Professional visits to other preschools, Reading literature in the field of early and preschool education, Reading professional journals and articles, Reading original scientific papers in the field of early and preschool education,* and *Visiting your colleagues' groups.*

RESULTS

Involvement of Preschool Teachers in Informal Forms of Learning

Table 1: Descriptive data on the use of informal forms of learning of preschool teachers

Variable	Rank	M	Sd	Min	Max
Agreeing on how to work with a colleague from the group	1	4.76	0.703	1	5
Documenting children's activities	2	4.62	0.742	2	5
Talking to colleagues about problems from practice	3	4.48	0.832	2	5
Joint preparation for work with a colleague from the group	4	4.47	0.682	1	5
Exchanging ideas with colleagues on improving the practice	5	4.27	0.800	2	5
Sharing incentives and materials with colleagues	6	4.14	0.923	2	5
Using social networks to exchange ideas from practice	7	4.01	1.310	1	5
Self-reflection on one's own educational work	8	3.93	1.115	1	5
Visiting your colleagues' groups	9	3.94	1.152	1	5
Analysing the collected documentation on children's activities	10	3.87	1.024	1	5
Asking children for feedback on the educational practice	11	3.80	1.195	1	5
Reading literature in the field of early and preschool education	12	3.52	0.974	2	5
Reading professional journals and papers	13	3.42	1.044	1	5
Experimenting with new work methods	14	2.90	1.125	1	5
Reading original scientific papers in the field of early and preschool education	15	2.89	1.152	1	5
Conducting reflections with colleagues on their educational work, seeking feedback	16	2.83	1.203	1	5
Observing colleagues and giving feedback on their educational work	17	2.78	1.337	1	5
Professional visits to other preschools	18	1.85	0.792	1	5

The results presented in Table 1 show that preschool teachers are most often involved in those forms of informal learning that do not necessarily aim at the planned acquisition of new knowledge and awareness change, such as *Agreeing on how to work with a colleague*

from the group (M = 4.76), *Talking to colleagues about problems from practice* (M = 4.48), *Joint preparation for work with a colleague from the group* (M = 4.47), *Exchanging ideas with colleagues on improving the practice* (M = 4.27), and *Sharing incentives and materials with colleagues* (M = 4.14). Most preschool teachers engage in these activities several times a month or several times a week. Those forms of informal learning that we associate with reflective practice and which are characterised by a focus on continuous learning and research practice and changes in the knowledge and implicit pedagogies of preschool teachers show a low involvement of preschool teachers. Thus, preschool teachers are less often involved in *Conducting reflections with colleagues on their own educational work* (M = 2.83) and *Observing colleagues and giving feedback on their educational work* (M = 2.78). According to the answers of the preschool teachers, it is evident that these activities are most often practiced several times a year. The lowest involvement of preschool teachers is visible in the activity of *Professional visits to other preschools* (M = 1.85), which is expected given the different conditions and practices of educational institutions as well as the form of learning that cannot be conducted on a weekly basis. On the other hand, this valuable form of informal learning for the most part remains an activity in which they did not participate once during the course of a year or in which they participate once a year.

Further analysis examined the differences in involvement of preschool teachers in different forms of informal learning regarding their sociodemographic data.

The ANOVA parametric test was applied to examine whether there are statistically significant differences in the involvement of preschool teachers in informal forms of learning regarding the level of their education. The results showed that there are statistically significant differences in only one item, the involvement of preschool teachers in the activity of sharing incentives and materials with colleagues, with regards to the level of education (F (3,106) = 4.763, p <0.01). The Bonferroni post hoc test was conducted in order to determine between which groups there are differences, as shown in Table 2. The final result shows that the preschool teachers who have completed graduate studies (M = 3.61) are statistically significantly less often involved in the activity than the others (undergraduate university studies (M = 4.42) and undergraduate professional studies (M = 4.26)). There are no statistically significant differences between preschool teachers who completed undergraduate professional studies and undergraduate university studies.

Table 2: Bonferroni post hoc test on the variable *Sharing incentives and materials with colleagues*

Education level (i)	Education level (j)	Mean difference (i-j)	Std. Error	Sig.
Undergraduate professional studies	Undergraduate university studies	-0.164	0.203	1.000
	Graduate studies	**0.648***	0.210	**0.015**
Undergraduate university studies	Graduate studies	**0.812***	0.229	**0.004**

*The mean difference is significant at the 0.05 level

The t-test was conducted to determine the differences in frequency of involvement in different forms of informal learning regarding the preschool teachers' participation in learning communities. The results show that there are no statistically significant differences in the involvement in different informal forms of professional development between preschool teachers who participate in learning communities and those preschool teachers who do not.

The analysis of variance (ANOVA) was performed to determine whether there is a statistically significant difference in the frequency of using certain forms of informal learning with regards to the category of work experience.

The analysis of the variance showed that there is a statistically significant difference only in the variable *Professional visits to other preschool*s (F (2,107) = 6.524, p<0.01). The post hoc test showed that preschool teachers with the most years of service (M = 2.13) go on more frequent professional visits than preschool teachers with up to four years of work experience (M = 1.48) and those with between 5 and 15 years of work experience (M = 1.86).

Preschool Teachers' Assessment of the Effectiveness of Certain Forms of Informal Learning in Their Professional Development

Table 3: Descriptive data on the effectiveness of the informal forms of preschool teachers' learning in their professional development

Variables	Rank	M	Sd	Min	Max
Direct agreement and exchange of experiences	1	4.3758	.54765	2.83	5
Reflective practice	2	4.2364	.48549	2.86	5
Learning from others	3	4.0673	.61556	1.4	5

As seen in Table 3, all variables in the preschool teachers' assessment of the effectiveness are assigned high values. They assess all forms of informal learning as highly effective in their professional development.

Analysis of variance (ANOVA) was used to determine whether there is a statistically significant difference in assessing the effectiveness of certain forms of informal learning in relation to different levels of preschool teachers' education.

The analysis of homogeneity of the variable *Reflective practice* found that the variables are homogenous (Levene's test= 0.967, df=3, p > 0.05). An analysis of the variance showed there is no significant difference (F (3,517) = 2.270, p > 0.05) between preschool teachers with different levels of education in terms of the assessment of the effectiveness of using informal forms of learning that include reflective competencies in their professional development.

The analysis of the homogeneity of the variable *Learning from others* found that the variables are homogenous (Levene's test = 0.441, df = 3, p > 0.05). An analysis of the

variance showed there is no significant difference (F (3,632) = 1.701, p > 0.05) between preschool teachers with different levels of education in terms of the effectiveness of using informal forms of learning and other professionals and associates.

The analysis of homogeneity of the variable *Direct agreement and exchange of experiences* found that the variables are homogenous (Levene's test = 1.42, df = 3, p > 0.05). An analysis of the variance showed there is a significant difference (F (3,936) = 3.321, p < 0.05) between preschool teachers with different levels of education in terms of the impact direct agreement and exchange of experiences have on the professional development of the individual.

Table 4: Bonferroni post hoc test on groups with different forms of education on the variable *Exchange and agreement*

Dependent variable	(i) Education level	(j) Education level	Mean difference (i-j)	Std. Error	Sig.
Exchange and agreement	Undergraduate professional studies	Undergraduate university studies	-.26356	.12285	.205
		Graduate studies	.16540	.12675	1.000
	Undergraduate university studies	Graduate studies	.42896*	.13843	.015

*The mean difference is significant at the 0.05 level

The post hoc test shows that they differ in such a way that preschool teachers with undergraduate university studies (M = 4.61) assess the effectiveness of *Exchange and agreement* with the highest value, statistically significantly more only than preschool teachers with completed graduate studies (M = 4.18).

A t-test was conducted in order to determine if there is a statistically significant difference in assessing the impact of certain forms of informal learning on their professional development regarding preschool teachers' involvement in learning communities. The results show that there is no statistically significant difference between preschool teachers who are involved in learning communities and those who are not in the factors *Reflective practice* on professional development (t = -1.316, df = 108, p > 0.05), *Learning from others* (t = -0.237, df = 108, p > 0.05) and *Exchange and agreement* as a factor impacting preschool teachers' professional development (t = -0.714, df = 108, p > 0.05).

The Kruskal-Wallis test has shown that there is a statistically significant difference between the groups with different work experience concerning the effectiveness of *Reflective practice* (χ^2 = 8.665, df = 2, p < 0.05). The Mann-Whitney test found that the preschool teachers with up to 4 years of work experience (N = 33, MR = 46.26) differ statistically significantly in understanding the impact of reflective practice on professional development (U = 486.50, Z = -2.478, p < 0.05) when compared to the preschool teachers with

more than 15 years of work experience (N = 44, MR = 33.56). Also, preschool teachers with up to 4 years of work experience (N = 33, MR = 39.77) differ statistically significantly (U = 337.50, Z = -2.669, p <0.01) from preschool teachers with 5 to 14 years work experience (N = 33, MR = 27.23). Younger preschool teachers, therefore, place a greater value on the reflective practice in their professional development compared to preschool teachers with more years of service. There is no statistically significant difference between preschool teachers with 5 to 14 years of work experience (N = 33, MR = 38.11) and those over 15 years of work experience (N = 44, MR = 39.67).

An analysis of the variance shows there is no significant difference (F (2,107) = 1.100, p > 0.05) between the preschool teachers with different work experience in their assessment of *Direct agreement and exchange of experiences* on the professional development of the individual. Also, there is no significant difference (F (2,107) = 0.565, p > 0.05) between the preschool teachers of different work experience in terms of the assessment of the effectiveness of informal forms of *Learning from other professionals and associates*.

DISCUSSION

The preschool teachers assessed that they are most often involved in those forms of informal learning that are not necessarily aimed at acquiring new knowledge and changing awareness and that relate to everyday activities. Since the educational group is usually led by two preschool teachers, it is expected that preschool teachers will be more involved in agreeing on the way of working and joint preparation for work. High involvement is also visible in the preschool teachers' conversations about the problems in practice and its improvement, which agrees with the results of the TALIS (OECD, 2009) survey in which preschool teachers showed a high level of involvement (93%) in informal dialogues with colleagues. Although the research provides insight into the involvement of preschool teachers in these activities, it cannot provide insight into the quality of their informal dialogues and how much these activities really contribute to professional growth and development.

Extremely high involvement of preschool teachers has been shown in the use of social networks to exchange ideas from practice. Given the society in which we live today, it is not uncommon for preschool teachers to contribute to their own professional development in a variety of ways. Social networks can certainly help to connect preschool teachers from different parts of the country and the world, where preschool teachers' different experiences contribute to discussions, a wealth of feedback, and a greater exchange of ideas/ advice. The Internet makes it possible to keep up with novelties, and social networks serve as an inexhaustible source of ideas and exchange of opinions on current situations that preschool teachers find themselves in. In addition, this is an affordable and inexpensive form of learning.

Preschool teachers are also involved in reading professional literature and reading professional papers, although they rarely read original scientific papers in the field of early and

preschool education. It is expected that a higher percentage of preschool teachers will be involved in this activity on an annual basis because preschool teachers in educational institutions are more often offered books and professional journals, while original scientific articles often mean self-initiative and activity in finding them, which requires more time and knowledge as well as the availability of sources through which such literature can be obtained. The research of Blanuša Trošelj (2018) linked the number of read sources with work experience, with preschool teachers with less work experience reading more. However, in the present research, there was no statistically significant difference.

Documenting children's activities was assessed with the highest values, which agrees with the results of research carried out by Vujičić and Čamber Tambolaš (2017), showing that this activity is common in the educational practice of preschool teachers. A higher level of preschool teachers' involvement in individual forms of informal learning can be explained by preschool teachers' awareness that professional development is the responsibility of each individual and that changes in practice do not happen without active self-action in this direction. An interesting result was obtained on the item *Asking children for feedback on the educational practice*, where a large number of preschool teachers do so on a weekly or monthly basis, while research by Múñez, Bautista, Khiu, Keh, and Bull (2017) shows that the largest percentage of preschool teachers from Singapore does the same between one and three times a year. The preschool teachers from the research show an awareness of the importance of listening to children and increasing their participation. In contrast, the results showed low values in the field of reflective practice related to the social learning process, i.e., group forms of reflective practice. The lower level of the preschool teachers' involvement in these activities can be explained by the fact that they are still not sufficiently ready for group reflection or to make their practice visible to others, and thus subject to questioning. It is known that reflective practice is a social process, that learning takes place in communion with others and not only on an individual level (Šagud, 2005). A lower level of involvement in these informal learning activities can also be an indicator of unsatisfactory conditions within the institution for their realisation.

Activities in which the preschool teachers are least involved include experimenting with new methods of work and professional visits to other preschools. When it comes to experimentation, research by Múñez et al. (2017) also shows that preschool teachers experiment with new methods of work several times a year, with a small percentage of those never doing so. A low level of involvement in professional visits to other preschools is expected given that professional visits to preschools are organised less frequently and depend on different conditions within educational institutions (Krajnc Dular, 2014; Krajnc Dular & Valenčič Zuljan, 2016). Given that 32.7% of preschool teachers have not yet had the opportunity to participate in this form of informal professional development, it can be concluded that the educational institutions in which they work are less connected with others. The reason may also be that this activity was offered to preschool teachers as a choice, which is why some of them did not have the opportunity to participate or did not recognise this activity as useful for their professional development. TALIS (OECD, 2009) also

shows that professional visits to other preschools are not a common practice of preschool teachers from other countries.

The phase of the preschool teachers' professional development proved to be a key socio-demographic characteristic in this research. The results show that there are no significant differences in the use of different forms of learning, except for professional visits, in which preschool teachers with more experience are more involved. In their model Day et al. (2007) describe novice preschool teachers as learning process-oriented, which may be related to their higher level of involvement in reading original scientific papers, but also fewer visits. A higher level of involvement of expert and veteran preschool teachers agrees with the model of Shechley and Allen (1991, as cited in Valenčič Zuljan, 2018), who say that preschool teachers in higher stages of professional development more often learn as a transformative process. On the other hand, Sheckley and Allen believe that novice preschool teachers transform the learning process the least, while research results show that novice preschool teachers, along with expert preschool teachers and veterans, are more involved in (self)reflection than preschool teachers in other stages of professional development. Such results indicate the commitment of novice preschool teachers to the learning process and their focus on professional growth and development, which agrees with the model proposed by Day and associates (2007) as well as the model of Blanuša Trošelj (2018).

The preschool teachers who see the highest level of benefits in the exchange of ideas and making agreements are those with completed university undergraduate studies. This may mean that preschool teachers with the obtained graduate level have acquired such a degree of competency that they seek less support and advice from colleagues. In addition, preschool teachers who have completed their undergraduate studies are still young and have fewer years of work experience (university undergraduate studies have been conducted since the academic year 2009/2010) and need more support, which is in line with previous research and professional development models (Blanuša Trošelj, 2018; Day et al., 2007).

Interestingly, involvement in learning communities does not particularly affect the involvement of preschool teachers in informal forms of learning. Given that learning communities are focused on continuous professional growth and development and strengthening the reflective and research capacities of preschool teachers, it was expected that the preschool teachers involved in them would be more involved in informal learning. This brings into question the organisation and quality of the formed learning communities.

CONCLUSION

The establishment of the knowledge society, with its emphasis on knowledge building, determined within recent decades as a consequence of the radical redefinition of the international labour market, has contributed to learning becoming an even more strategic factor for global competitiveness.

Workplace learning is becoming increasingly important in professions. The character of work and workplace as a learning environment is changing. Therefore, it is no coincidence that interest in research has grown in recent decades. In this context, the professional development of the pedagogical staff and the creation of a learning community (the preschool as workplace) is of particular importance. In order for the pedagogical staff – preschool teachers and teachers – to be able to encourage their students and children to innovate and engage in lifelong learning, they themselves must be innovative and committed to their own learning and development throughout their careers. This research has shown that there is a need to strengthen the availability of certain forms of informal learning, such as reading original scientific papers in the field of early and preschool education and reflective practice related to the social learning process. A higher level of involvement of expert and veteran preschool teachers in professional visits have shown that preschool teachers with less experience need to be more involved in this valuable form of informal learning. Informal learning is accessible and recognisable to preschool teachers as useful in their professional development, and must become a recognised part of a quality systematic educational policy, in which the action of preschool teachers is a model for the first step in the lifelong education of children.

It would be useful to subject this topic to qualitative research in the future to achieve a deeper understanding of the results obtained. In this way, the reasons and problems that accompany the low involvement of preschool teachers in *experimenting with new work methods, reading original scientific papers in the field of early and preschool education, conducting reflections with colleagues on their educational work, seeking feedback, observing colleagues* and *giving feedback on their educational work and professional visits to other preschools* would be revealed, and targeted action could be taken towards a greater involvement of preschool teachers in these informal forms of learning.

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Marjeta Šarić

VLOGA ČUSTEV PRI UČENJU NA DELOVNEM MESTU

POVZETEK

Namen članka je prikazati pomen čustev pri učenju na delovnem mestu. Čustva so element, ki priteguje vse večjo pozornost različnih ved, med drugim so vse bolj intenzivna prizadevanja raziskovalcev, da bi razumeli vlogo čustev pri učenju. Skozi pregled literature, ki je zasnovan predvsem na psihološki in socialno psihološki teoretični perspektivi, je utemeljena glavna teza o pomembni vlogi čustev pri učenju, ki jo velja upoštevati pri spodbujanju kakovostnega učenja na delovnem mestu. Pregledu različnih opredelitev čustev sledi obravnava čustev pri učenju, nato pa so predstavljeni nekateri specifični vidiki čustev ob učenju na delovnem mestu. Pri tem je razvidno, da je to specifično področje še precej neraziskano in nima oblikovanega enotnega teoretičnega okvira. Kljub temu lahko ugotovimo, da je odnos med čustvi in učenjem na delovnem mestu kompleksen in vzajemen. Analiza obravnavane literature kaže, da ni smotrno spregledati vloge, ki jo ima čustveno doživljanje delavcev, ko se učijo na delovnem mestu.

Ključne besede: *čustva, učenje, učenje odraslih, učenje na delovnem mestu*

THE ROLE OF EMOTIONS IN WORKPLACE LEARNING – ABSTRACT

The aim of the article is to explore the importance and role of emotions in learning at the workplace. Emotions are a phenomenon that is increasingly attracting attention in the various sciences, and there is a growing concern among researchers to understand emotions in learning. The literature review, which is mainly based on psychological and social psychological theoretical perspectives, supports the argument that emotions play an important role that needs to be considered in facilitating and supporting learning at the workplace. After the definitions of emotions and their relation to learning are presented, some specific issues concerning emotions and learning at work are addressed. Despite evidence that the field is underexplored and that there is a lack of a coherent theoretical framework, the main conclusions of the discussion point to a complex and reciprocal relationship between emotions and learning at work. The analysis of the reviewed literature shows that it is not wise to ignore the role of the employees' emotional experience in workplace learning.

Keywords: *emotions, learning, adult learning, workplace learning*

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UVOD

Pri obravnavi čustev pri učenju na delovnem mestu imamo opraviti s tremi zelo pomembnimi pojmi, ki je vsak zase izjemno kompleksen in razvejen. Pojem učenja je širok in ima obsežno teoretično ter empirično podlago, zlasti na področju kognitivne, razvojne in pedagoške psihologije. Pojem učenja na delovnem mestu postavlja ta ključni proces v kontekst delovnega okolja z njegovimi značilnostmi (Noe, Clarke in Kelin, 2014; Poell in van Woerkom, 2011). Temu se pridružuje še tretji kompleksni pojem, to so čustva, ki so v zadnjih desetletjih vse bolj priznana tema tako v temeljnih vedah, to so zlasti psihologija, filozofija, sociologija, biologija, kot tudi v bolj aplikativnih vedah. V tem članku bom najprej na kratko predstavila pregled psiholoških teorij čustev, temu bo sledila obravnava vloge čustev pri učenju, nato pa bom posebej izpostavila čustva pri učenju na delovnem mestu. Osnovna teza članka je, da imajo čustva pri učenju na delovnem mestu pomembno vlogo, ki je ne velja spregledati. Pri povezovanju tako obširnih pojmov, kot so čustva in učenje, s posebnim poudarkom na učenju na delovnem mestu, pa gre za izjemno kompleksne medsebojne odnose. Pri tem naj opozorim, da gre za osnoven prikaz, ki lahko pripomore k boljšemu razumevanju učenja v delovnem okolju, s tem pa k boljšemu načrtovanju in izvedbi učenja ter k bolj konstruktivnemu soočanju z ovirami pri tem.

KRATEK PREGLED PSIHOLOŠKIH TEORIJ ČUSTEV

Pri proučevanju čustev se najprej srečamo s precejšnjo terminološko in pojmovno neenotnostjo. Osnovna ontološka razhajanja pri opredeljevanju pojma »čustvo« so precej globoka in nič ne kaže na skorajšnjo uskladitev (npr. Barrett, 2014; Izard, 2007; LeDoux, 2012; Panksepp, 2007; Russel, Rosenberg in Lewis, 2011). To, da ni enotne opredelitve čustev, je še posebej očitno pri uporabi sorodnih, a različnih pojmov, kot so afekt, občutki, razpoloženje in podobno. Ti pojmi so v literaturi občasno obravnavani kot sopomenke, drugič pa lahko opazimo uporabo enega pojma (npr. afekta) kot nadkategorije ali podkategorije; občasno jih avtorji jasno opredelijo, včasih jasne opredelitve sploh ni. Čustva nekateri raziskovalci pojmujejo kot stanje (npr. Damasio, 2008), drugi kot proces (npr. Ellsworth, 2013), nekateri bi jih raje kot v samostalniški obliki uporabljali v glagolski (Mesquita, 2010), nekateri pa ostajajo pri splošni oznaki, da je čustvo pač večkomponentni konstrukt, ki ga določajo njegovi sestavni elementi (Frenzel in Stephens, 2013). Prav sestavljenost konstrukta je tista točka, na kateri se sreča večina raziskovalcev tega kompleksnega pojava (npr. Boiger in Mesquita, 2012; Frijda, 2008; Niedenthal, Krauth-Gruber in Ric, 2006). Osnovne sestavine čustev so: subjektivna izkušnja (občutki), vedenjski (motorični) izraz, kognitivna presoja, fiziološko vzburjenje in pripravljenost za vedenjski odziv (akcijske tendence). Raziskovalci pa se razlikujejo v tem, kakšne odnose med posameznimi sestavinami predpostavljajo: ali se te sopojavljajo ali so med njimi vzročno-posledični odnosi, ali so koherentne ali ne, ali so posamezne sestavine medsebojno odvisne ali relativno neodvisne (Niedenthal idr., 2006).

Ob omenjenih pojmovnih in terminoloških težavah srečujemo poskuse, da bi uredili medsebojne odnose med različnimi teorijami in pojmovnimi okviri. Smrtnik Vitulić (2007) je opredelitev čustev organizirala okoli štirih večjih skupin teorij čustev: fiziološke/nevrološke, funkcionalne, kognitivne in socialne. Tudi Gross in Barrett (2011) sta se lotila organizacije različnih teoretičnih pogledov na čustvovanje. Razvrstila sta jih po kontinuumu, ki sta ga oblikovala glede na možnost razlikovanja med procesoma nastanka čustev in njihovega uravnavanja. Na eni strani kontinuuma gre za dva ločena procesa, na drugi strani pa o tej ločitvi obeh procesov ni možno govoriti. Po kontinuumu so teorije in modeli razvrščeni v štiri večje sklope: (1) teorije temeljnih čustev (sem spadajo predvsem fiziološke, nevrološke in funkcionalne teorije), (2) teorije presojanja in kognitivne teorije, (3) teorije psihološke konstrukcije ter (4) teorije socialne konstrukcije. V njuni razvrstitvi izstopajo teorije psihološke konstrukcije, ki so ločene od kognitivnih teorij. Niedenthal idr. (2006) so razdelili teorije čustev v tri širše sklope: evolucijske teorije, kognitivne teorije presojanja in socialne konstrukcionistične teorije. Vse tri razdelitve so si sorodne v tem, da so na neki način združile teorije čustev v sklope glede na raven proučevanja: *biološka raven* (nevrološke, fiziološke, funkcionalne in evolucijske teorije), *psihološka* (kognitivne teorije, teorije psihološke konstrukcije) in *socialna* (socialne konstrukcionistične teorije).

Za *nevrološke in fiziološke teorije* je značilno, da bistvo čustvovanja iščejo v biokemičnih procesih v človeškem organizmu. Priznavajo tudi druge vidike čustvenega doživljanja (vedenjske, fenomenološke, socialne idr.), vendar so raziskovalci usmerjeni v proučevanje značilnih vzorcev sprememb v živčnem sistemu, v katerih vidijo temelj ali celo izvor nastanka čustva. Osnovna, pogosto neizrečena predpostavka teh teorij je, da so kompleksni možganski procesi vir subjektivnega čustvenega doživljanja (Damasio, 2008; Panksepp, 2007). Veliko spoznanj z nevrofiziološkega področja je utemeljenih na raziskavah z živalmi, zlasti z manjšimi sesalci – glodavci, kot so podgane in miši, a tudi primati, kot so opice makaki (npr. LeDoux in Phelps, 2008; Panksepp, 2007). To povzroča precej težav pri utemeljevanju in razlagi čustvenih procesov, ki bi jo lahko prenesli na človeško čustveno izkušnjo.

Blizu tega sklopa teorij so še *funkcionalne* (Izard, 1991, v Smrtnik Vitulić, 2007) in *evolucijske teorije* (Tooby in Cosmides, 2008). Za funkcionalne teorije je značilno, da čustva pojmujejo kot prirojene programe, ki so se oblikovali skozi evolucijo, zanje pa so bistvene fiziološke spremembe, ki jih spremljajo značilni izrazi obraza in motorična dejavnost (Izard, 1991, v Smrtnik Vitulić, 2007). Evolucijske teorije pa izhajajo iz teze, da je za funkcionalno vedenje po evolucijskih standardih (kjer ne gre le za preživetje posameznega organizma, ampak vrste oziroma genskega zapisa) potrebno uskladiti množico specializiranih mentalnih programov in podprogramov, tako da usklajeno nastopajo pred prilagoditveno zahtevo, s katero so soočeni (Tooby in Cosmides, 2008).

Kognitivni pristopi, kamor uvrščamo zlasti *teorije presojanja* (angl. *appraisal theories*), obravnavajo čustva kot procese v večdimenzionalnem prostoru (Ellsworth, 2013), pri čemer gre za prilagoditvene odzive posameznika, ti odzivi pa so odvisni od *presoje* lastnosti okolja, ki so pomembni za posameznikovo dobrobit (Moors, Ellsworth, Scherer

in Frijda, 2013). Osrednjo vlogo pri nastanku čustev ima presoja oziroma ovrednotenje spremembe v okolju (zunanjem ali notranjem) z vidika zadovoljevanja ali blokade za posameznika pomembnih zadev, naj so to potrebe, vrednote, trenutni cilji ali prepričanja. Kriteriji presoje se med posameznimi predstavniki teorij pripisovanja med seboj nekoliko razlikujejo, po Moors idr. (2013) pa so jim skupni naslednji kriteriji: primernost in skladnost s cilji, gotovost dogodka/situacije, vir delovanja (ali se v situaciji avtonomno odločam za svoje ravnanje), zmožnost soočanja in nadzora. V nekaterih teorijah avtorji dodajajo še druge kriterije presoje, ki vplivajo na variabilnost v čustvih: novost, pričakovanje, nujnost, namera, legitimnost, usklajenost z normami (Moors idr., 2013). V procesu presoje posameznik ovrednoti eno ali več od navedenih spremenljivk. Presoja je tista, ki določa intenzivnost in kakovost akcijskih tendenc, fizioloških odzivov, vedenja in občutkov, torej vrsto in kakovost čustva. Obenem pa Moors idr. (2013) omenjajo rekurzivnost v procesu nastanka in razvoja čustva, torej da lahko tudi preostale komponente čustva povratno vplivajo na presojo. Na primer ko zaradi treme pri nastopanju v javnosti izgubimo rdečo nit, začutimo hitro bitje srca, se začnemo potiti, govor se zatika. Ko vse to opazimo, znova presodimo, da je situacija res neugodna, trema in anksioznost se povečata in pojavita se še strah in zaskrbljenost, kako se bomo iz situacije kar najbolje rešili.

Vmesni položaj med kognitivnimi in socialnimi konstrukcionističnimi teorijami zavzemajo *teorije psihološke konstrukcije* (Gross in Barrett, 2011); vodilna med njimi je teorija pojmovnega dejanja (angl. *conceptual act theory*; Barret, 2014). S teorijami presojanja si ta teorija deli načelo, da je čustvo kognitivno urejeno afektivno stanje. Po teoriji pojmovnega dejanja so ljudje v interakciji z okoljem ves čas vrednotno naravnani – nekaj je za posameznika dobro, slabo ali nevtralno. Medtem ko teorije presojanja razlagajo nastanek določenega čustva v odvisnosti od izbranega kriterija presoje, pa teorija pojmovnega dejanja nastanek čustva razlaga s pojmovnim znanjem o čustvu. In medtem ko teorije presojanja ta proces razumejo v načelu zaporedno, teorija pojmovnega dejanja čustvo dojema kot sočasno porajajoč se proces ovrednotenja in kategorizacije. Prihajajoče informacije se že ob samem začetku zaznavanja oblikujejo okoli poznanih pojmov, tako da že sam jedrni afekt nosi s seboj pojmovno informacijo. Spremembe v jedrnem afektu ljudje osmišljajo s pojmovnim znanjem, ki ga imajo, in tako nastane čustvo (Barrett, 2014).

Eno od izhodišč *teorije socialne konstrukcije in kulturne razlage čustev* je opažanje, da obstajajo velike razlike med kulturami v količini in vrsti čustvenih izrazov, pojmovanjih ter pravilih čustvenega izražanja. Kakor za druge psihološke pojme tudi za čustva velja, da socialne konstrukcionistične teorije zavračajo nativizem (biološko resničnost pojmov) in čustva pojmujejo kot socialne konstrukcije, ki služijo ciljem socialne skupine oziroma družbe kot celote (Niedenthal idr., 2006). Te teorije sicer sprejemajo kognitivno razlago, da čustva nastanejo kot rezultat presoje pomembnosti situacije za posameznika, vendar jasno opredeljujejo, da je specifična vsebina tega presojanja naučena in kulturno določena. Po razlagi *kulturne psihologije* (Shweder, Haidt, Horton in Joseph, 2008) se v kulturi oblikuje za posameznika dostopen niz pomenov, pojmovanj in razlagalnih shem, ki v

procesu inkulturacije aktivno oblikujejo psihološke procese posameznika v določeni socialni skupini, torej tudi čustva.

Boiger in Mesquita (2012) kot predstavnika *socialne konstrukcionistične* struje čustva opredeljujeta z večkomponentne perspektive, in sicer tako, da se čustva pojavijo kot rezultat vzajemnega delovanja različnih sestavin (kognitivnih, motivacijskih in fizioloških), pri čemer ima presoja osrednjo vlogo pri organiziranju preostalih sestavin čustva (tu se skladajo s kognitivnimi teorijami presoje). Avtorja k tej razlagi dodajata, da so čustva neločljivo povezana z medosebnimi odnosi – oblikovanje čustvenega odziva je dinamičen trajen proces, ki je vzpostavljen v kontekstu interakcij, odnosov in kulture (njenih pravil, norm, vrednot itn.). Kulturni modeli dajejo posamezniku védenje o osrednjih vrednotah, ciljih in skrbeh, torej priskrbijo vsebino za presojo, ki usmerja razvoj določenega čustva. Poleg tega kulturni modeli vsebujejo tudi vedenjska pravila in okoliščine, v katerih se določena presoja ali čustvo sploh lahko pojavi oziroma na kakšen način se pojavi. Denimo na žalitev je tako pri Američanih kot pri Japoncih običajen odziv »jeza«, toda način reagiranja ob doživljanju jeze bo pri Američanih bolj verjetno asertivnost ali agresivnost, pri Japoncih pa bo ta jeza večkrat brez vedenjskega odziva (Mesquita, 2010). To veliko vlogo interakcije pri nastajanju čustev je Mesquita (2010) poudarila s tem, da ne uporablja pojma čustvo v samostalniški edninski obliki, s čimer naj bi se poudarjala njegova stabilna in statična lastnost. Ker so čustva način povezave posameznika s socialnim okoljem, o čustvu v ednini v tem kontekstualiziranem pomenu težko govori, zato raje uporablja pojem čustvovanje (angl. *emoting*). Ne gre le za to, da je čustvovanje socialno določeno in umeščeno, ampak je čustvovanje samo po sebi socialno dejanje, katerega pomen izhaja iz odnosa, znotraj katerega poteka.

Po pregledu osrednjih psiholoških teorij čustev je očitno, da je ob izjemni kompleksnosti tega pojma težko prav kmalu pričakovati teorijo, ki bi v celoti zajela in izčrpno razložila čustva z vseh navedenih perspektiv; med drugim tudi zaradi tega, ker si nekatere teorije močno nasprotujejo prav v temeljnih izhodiščih v zvezi z bistvom pojava (npr. trditev »možgani proizvedejo čustva« se močno razlikuje od trditve »čustvovanje je socialno dejanje«). Mnenja so deljena, predvsem med nekaterimi predstavniki nevroloških in funkcionalnih teorij obstaja trdno prepričanje, da čustva obstajajo kot univerzalne naravne kategorije, kot so strah, veselje ipd. (npr. Panksepp, 2007; Izard, 2007). Na drugi strani teorije psihološke in socialne konstrukcije jasno izpeljujejo tezo o tem, da gre za psihološko oziroma socialno konstruirane kategorije, ki izhajajo iz procesa presojanja in osmišljevanja, ter da se razlikujejo med posamezniki in družbenimi skupinami (Barrett, 2014; Mesquita, 2010).

To, da se s temeljnimi vprašanji o tem, kaj so čustva in kako jih lahko razumemo, poleg psihologije poglobljeno ukvarjajo tudi druge vede, še dodatno zaplete zadevo, ko se raziskovalec loti proučevanja nekega bolj specifičnega področja. Čustva intenzivno proučujejo v sociologiji (npr. Denzin, 1984/2007; Hochschild, 1983; Stets in Turner, 2008), prav tako v filozofiji (npr. Solomon, 2008; Scarantino in de Sousa, 2018), pri čemer so psihološke teorije pogosto deležne stroge kritike individualizma in ozkoglednosti (npr.

Zembylas, 2007). Posebej so zahtevni in zanimivi poskusi navezovanja spoznanj in njihovega medsebojnega izgrajevanja. Tako denimo Wetherell (2015) opozarja na socialno psihološke temelje nekaterih pojmov v socialni teoriji in kulturnih študijah, Rimé (2020) pa v svojem zadnjem prispevku elegantno združuje socialno psihološka in sociološka spoznanja o skupnem, kolektivnem znanju, ki je v jedru čustvenega doživljanja in ga obenem s tem, ko delimo čustva z drugimi, obnavljamo in bogatimo.

Proučevanje čustev na delovnem mestu je še bolj razdrobljeno, in sicer znotraj bolj aplikativnih ved, ki se ukvarjajo z delovanjem organizacij, vodenjem in upravljanjem, izobraževanjem in usposabljanjem odraslih itn. Avtorji prevzemajo raznolika teoretična izhodišča temeljnih ved, pri čemer nekateri v ospredje postavljajo bolj sociološke poglede, drugi bolj psihološke. V tej raznolikosti so avtorji včasih bolj, drugič manj nazorni in eksplicitni pri tem, katera so njihova lastna teoretska izhodišča, ali pa jih nereflektirano privzemajo. To lahko daje vtis še večje razdrobljenosti in obenem otežuje medsebojno povezovanje pomembnih spoznanj.

PREPLETENOST ČUSTEV IN UČENJA

Nadalje se postavlja vprašanje, kako so čustva povezana z učenjem. Pri učenju so običajno v ospredju zaznavni in kognitivni procesi, manj pozornosti pa se posveča čustvovanju kot sestavnemu delu učenja. A vendar je tako na teoretični ravni kot na ravni empiričnega raziskovanja vse bolj uveljavljena teza o tesni medsebojni prepletenosti kognitivnih in čustvenih procesov (Frijda, 2008; Linnenbrink-Garcia in Pekrun, 2011). Pri proučevanju povezanosti čustev in učenja prevladujejo kognitivne teorije čustev (Pekrun, Frenzel, Goetz in Perry, 2007). Kot že omenjeno se v skladu s kognitivnimi teorijami čustva pojavijo kot rezultat presoje pomembnosti situacije za posameznika, ki se potem odzove v skladu s to presojo (Moors idr., 2013). Pri tem presojanju najpogosteje ne gre za zavestne in analitične kognitivne procese, ampak za avtomatske in spontane ocene situacije, na primer ali je to dobro ali slabo zame, me to privlači ali odbija. Obenem ta presoja ne poteka v izolaciji: védenje o dobrem in slabem, o sebi in svetu ljudje razvijamo v medsebojni interakciji (Rimé, 2020). Gre za dinamičen in kontinuiran proces, ki je vzpostavljen v kontekstu medosebnih interakcij, odnosov in kulture. Čeprav je neposredno doživljanje kot osebna fenomenologija čustva subjektivna in neponovljiva, to ne pomeni, da je izolirana in neodvisna od konteksta, v katerem se oblikuje. Čustva so način povezanosti posameznika s socialnim okoljem, ki določa pomene situacij in jih soustvarja, in podobno kot čustva je tudi proces učenja izrazito socialne narave v različnih razsežnostih. Naj izpostavim dve najpomembnejši. Učenje vedno poteka v nekem kontekstu, v razmerju s socialnim in kulturnim okoljem (de Corte, 2013), pa tudi samo znanje je rezultat raznolikih socialnih interakcij, ki potekajo v znanstveni skupnosti v konkretnem institucionalnem, ekonomskem in širšem družbenem kontekstu (Longino, 2019).

Odnos med čustvi in učenjem je kompleksen in večsmeren. Čustva so del učnega procesa na več ravneh (Moon, 2004):

- čustveno doživljanje kot dejavnik, ki učenje lahko spodbuja ali zavira;
- čustveno doživljanje kot vsebina učenja (denimo pri učenju komunikacijskih veščin);
- sprememba v čustvenem doživljanju kot učinek učenja (denimo zadovoljstvo in sreča, ponos, razočaranje, strah pred spremembo);
- učinek učenja je odvisen tudi od čustvene inteligentnosti oziroma zmožnosti zavedanja in uravnavanja lastnih čustvenih odzivov, kar se kaže denimo v zmožnosti dobrega sodelovanja in uravnavanja klime v učni skupini, bolj ali manj pristnih načinih odzivanja, v zmožnosti vživljanja in razumevanja čustev drugih.

Še posebej v zadnjem desetletju se na pedagoško-psihološkem področju povečuje interes za empirično proučevanje povezanosti čustev in učenja (Linnenbrink-Garcia in Pekrun, 2011; Mega, Ronconi in De Beni, 2014). Na šolskem področju so precej podrobno proučevana »storilnostna« čustva (angl. *achievement emotions*), ki so vezana na situacije, v katerih učenci izkazujejo, ali pa ne, svoje učne dosežke (Frenzel in Stephens, 2013). Tu gre zlasti za vrednotenje posameznika oziroma njegovega vedenja z vidika uspešnosti – kako učenec doživlja svoj učni uspeh glede na primerjavo z lastnimi pričakovanji ali pričakovanji drugih.

Na področju izobraževanja odraslih je celovito razumevanje učenja že bolj uveljavljeno, saj teorije učenja in izobraževanja odraslih vključujejo čustvene procese kot sestavni del učnega procesa, na primer Kolbova teorija izkustvenega učenja (2015) ali teorija transformativnega učenja (npr. Mezirow, 1997). Obe omenjeni teoriji sta bili sicer deležni kritik, da še vedno vsebujeta osnovni kartezijanski dualizem med telesom in umom (Benozzo in Colley, 2012; Korthagen in Vasalos, 2005). Dirkx (2008) posebej poudarja potrebo po integraciji čustev v proces učenja znotraj raznolikih kontekstov izobraževanja odraslih.

Prej omenjene razlage čustev pri učenju namenjajo pozornost zlasti čustvenemu doživljanju ob učenju, torej kako čustva vplivajo na kakovost učenja, ali pa čustva obravnavajo kot posledico neke učne situacije. Pri tem pa je smiselno opozoriti, da je čustveno doživljanje lahko tudi povod za učenje. Da bi bolje razumeli, kako sploh pride do sprememb v znanju, prepričanjih in stališčih, se je smiselno spomniti na socialno psihološko teorijo kognitivne disonance Leona Festingerja (1957, v Harmon-Jones, 2000). Po tej teoriji prisotnost kognitivne neskladnosti oziroma nekonsistentnosti vzbudi negativno čustveno stanje, ki motivira kognitivno delovanje, namenjeno zmanjšanju kognitivnega neskladja. Kognitivno neskladje kot spodbudo za učenje in refleksijo je v ospredje postavil že Dewey (1944 v Rodgers, 2002). Na teh predpostavkah temelji tudi teorija transformativnega učenja (Dirkx, 2008; Mezirow, 1997), ki v jedro učenja postavlja transformacijo obstoječega referenčnega okvira (celote osebnih pojmovanj, prepričanj, predpostavk o določenem pojavu ali o sebi). Dirkx (2008) poudarja, da je podpora pri osmišljanju in razumevanju čustveno obarvanih izkušenj ena od najpomembnejših in tudi najzahtevnejših nalog izobraževalca odraslih. Prav tako so po navedbah Riméja v psihologiji kognitivno delo kot posledico čustev sprva proučevali pri intenzivnih življenjskih dogodkih, kot so travme in drugi negativni dogodki, kasneje pa še pri bolj vsakdanjih čustvih (Rimé, 2020). Ljudje želimo na različne načine zmanjšati razhajanje v neskladnih informacijah, stališčih ali

razrešiti neskladje med tem, kar vemo in kako delujemo. Da bi zmanjšali kognitivno disonanco in spremljajoče neprijetno čustveno stanje, se lahko obstoječa prepričanja ali stališča okrepijo in utrdijo, lahko pa se tudi spremenijo (Harmon-Jones, 2000; Rimé, 2020). Za zmanjšanje kognitivne disonance posameznik pozabi ali celo potlači vire disonance (informacije, dejanja, spomine, trditve). Za kakovostno učenje je najugodnejši rezultat mentalnega napora za zmanjšanje kognitivne disonance kognitivno prestrukturiranje: uskladiti razlike s pomočjo načela višjega reda. Pri tem ima pomembno vlogo proces refleksije, ki omogoča, da konkretne praktične izkušnje pretvorimo v znanje (Rodgers, 2002; Schön, 1983).

Primer s področja izobraževanja odraslih je model *jedrne refleksije*, ki ga je kot model supervizije v strokovnem razvoju učiteljev razvil Korthagen s sodelavci (Korthagen in Vasalos, 2005). Osnovne predpostavke tega modela so:
- učitelji samodejno reflektirajo svoje izkušnje, vendar se sistematična refleksija pogosto razlikuje od tega, kar so učitelji vajeni početi;
- notranje vodeno učenje ob podpori/strukturi, ki jo dajejo mentor, supervizor in usposobljeni kolegi, pripomore k strokovni rasti učitelja;
- izvori vedenja učiteljev niso vedno zgolj racionalni in tehnični (v smislu nekih postopkov stroke, ki so se jih naučili pri študiju), ampak so velikokrat »obteženi« z njihovimi lastnimi bolj ali manj zavestnimi predpostavkami, osebnimi teorijami, nezavednimi prepričanji ipd. Upoštevanje teh manj racionalnih izvorov učiteljevega vedenja in optimizem, da lahko nanje vplivamo, jih imamo za učno izkušnjo in s tem povečujemo strokovno znanje učiteljev, je bistvo jedrne refleksije.

ČUSTVA IN UČENJE NA DELOVNEM MESTU

Na delovnem mestu poteka učenje v zelo raznolikih situacijah, tako v okviru formalnega izobraževanja in usposabljanja kot tudi neformalnega izobraževanja in priložnostnega učenja (npr. Hökkä, Vähäsantanen in Paloniemi, 2020; Poell in van Woerkom, 2011). V okviru začetnega izobraževanja in usposabljanja formalno učenje običajno poteka že v času študija, v obliki študijske prakse, ob nastopu dela na novem delovnem mestu, v kasnejših obdobjih so pogostejše manj formalne oblike učenja, denimo ob spodbujanju nadaljnjega strokovnega razvoja, ob spremembah v delovnih nalogah zaradi sprememb v delovni organizaciji (recimo menjava oddelka, odločitev za informatizacijo dela) ali zaradi nepredvidenih zunanjih okoliščin (npr. požar, epidemija), povsem priložnostno pa ob vsakdanjih dogodkih na delovnem mestu. Ko govorimo o učenju na delovnem mestu, pa je smiselno opozoriti tudi na to, da ne gre le za raznolike situacije, kar ga ločuje od običajnega, bolj poenotenega tipičnega »šolskega« učenja, ampak tudi za to, da poteka v različnih oblikah (organizirane oblike usposabljanj, individualno učenje, mentorstvo idr.). Tudi pojem učenja ni enostaven in enoplasten, na kar kažejo tudi raznoliki modeli učenja. Na področju učenja na delovnem mestu Tynjälä (2013) predstavlja tridelni model, prirejen po Biggsovem modelu, in sicer: 1) vstopne oziroma predhodne značilnosti učečega se in učnega konteksta ter interpretacija teh značilnosti, 2) procesi učenja, tako formalnega,

neformalnega kot priložnostnega, namernega in nenamernega, v vsakdanjih delovnih okoliščinah, v sodelovanju v timih, skozi refleksijo in ovrednotenje delovnih izkušenj, vključevanje v formalne oblike usposabljanja itn., ter 3) rezultati oziroma produkti učenja, kot so izboljšanje opravljanja delovnih nalog, reševanje problemov in odločanje, osebni razvoj, oblikovanje identitete, razvoj organizacije itn.

Ob vsej raznolikosti učenja na delovnem mestu je tudi tukaj neizogibna prepletenost učenja s čustvenim doživljanjem. Kontekst, v katerem se učenje odvija, je konkretno delovno okolje, znotraj katerega posamezniki osmišljajo sebe in svoje okolje, ob tem pa doživljajo bolj ali manj intenzivna čustva. V nadaljevanju bodo predstavljene ugotovitve nekaterih raziskav s področja učenja na delovnem mestu, ki vključujejo čustveni vidik. Teh raziskav je malo, so razpršene, zlasti pa je značilna že omenjena teoretska raznovrstnost pristopov in spoznanj, ki otežuje poenotenje razumevanja tega kompleksnega področja (Hökkä idr., 2020). Raziskovanje odnosa med čustvi in učenjem na delovnem mestu se šele postopno razvija, v raziskavah pa avtorji le redko eksplicitno navedejo opredelitev ali teoretično razumevanje pojma čustvo, kar otežuje primerjavo rezultatov teh raziskav in enoznačne sklepe. Prav tako so raziskave omejene predvsem na delovna področja poučevanja, zdravstva in socialnega dela, zelo malo pa je raziskovalnih podatkov z drugih delovnih področij, denimo proizvodnje, tehnike in tehnologije, preostalih dejavnosti zasebnega sektorja (Hökkä idr., 2020).

Bierema (2008) v pregledu raziskav navaja dva vidika povezanosti čustev in učenja na delovnem mestu: čustveno inteligentnost in čustveno delo. Na eni strani je vidik čustvene inteligentnosti po Saloveyju in Meyerju (1990, v Bierema, 2008), torej kot zmožnosti za spremljanje lastnih čustev, razlikovanje med različnimi čustvenimi stanji in ustrezne uporabe čustvenega znanja pri odločanju in ravnanju. Ta zmožnost temelji na zaznavi, razumevanju in uravnavanju lastnih čustev, gre pa tudi za zmožnost prepoznavanja čustev drugih in uravnavanja medsebojnih odnosov. Na delovnem mestu je čustvena inteligentnost pomembna v smislu ohranjanja čustvenega ravnovesja in zmanjševanja čustvene disonance, ki povečuje stres pri delu in tveganje za izgorelost, prav tako pa omogoča pripravljenost za učenje oziroma zmanjša zaviralni vpliv čustev (zlati negativnih) na motivacijo za učenje. Na drugi strani Bierema (2008) opozarja na čustveno delo, kot ga je opredelila že Hochschild (1983), in sicer kot zahtevo delovnega mesta, da zaposleni izražajo določena čustvena stanja in spodbujajo določena čustva pri drugih (zlasti strankah oziroma uporabnikih delovnih storitev), pri čemer je čustveno izražanje pojmovano kot obvezen del njihovih poklicnih nalog (denimo prijaznost in nasmeški na obrazih stevardes). Čustveno delo poveča nadzor vodilnih nad čustvenim delovanjem zaposlenih, ob tem pa se poveča možnost, da ti doživljajo čustveno neskladje, povečata se lahko nezadovoljstvo in tveganje za že omenjeno izgorelost pri delu. Bierema (2008) ne zavzame izrazito kritične drže v zvezi z vzpostavljanjem in vzdrževanjem odnosov moči skozi čustveno delo (h kritičnemu pogledu se bom kasneje še vrnila), ampak oblikuje sklep, naj se vodstveni kadri zavedajo, da ima čustveno delo neposredne učinke na delavce, zato naj jim pomagajo, da se opremijo s strategijami in viri za soočanje s čustvenim stresom.

S pojmom čustvenega dela so se nadalje ukvarjali mnogi drugi avtorji. Tako je Oplatka (2007) pri proučevanju čustev učiteljev predlagal razlikovanje dveh vrst čustvenega dela. Prva vrsta, v angleščini imenovana »*emotional labor*« (Hochschild, 1983), se nanaša na tiste poklice, pri katerih se od zaposlenih zahteva, da izražajo določena čustvena stanja, torej je čustveno izražanje pojmovano kot obvezen del njihovih poklicnih nalog (že prej omenjeni prijaznost in nasmeški na obrazih stevardes). Gre za neposreden vpliv zahtev delovnega mesta, ki so povezane z nameni in dobički delovne organizacije. Druga vrsta čustvenega dela, ki jo Oplatka (2007) v angleščini imenuje »*emotional work*«, pa označuje čustveno stanje, ki sicer izhaja iz zahtev delovnega mesta, vendar je posameznik avtonomen pri upravljanju lastnih čustvenih izrazov. Točno določeni čustveni izrazi torej niso zahtevani in ne pogojujejo delavčeve plače, dobičkov podjetja ali česa podobnega. Pri raziskovanju uravnavanja čustev učiteljev pri njihovem delu je Oplatka (2007) na podlagi poročanja učiteljev ugotovil, da je za poučevanje značilna druga, bolj avtonomna oblika uravnavanja lastnih čustvenih stanj. Neka posredna oblika zunanje kontrole je pri poučevanju vendarle prisotna, in sicer v obliki kulturnih pričakovanj, saj so učitelji pri svojem izražanju in celo doživljanju omejeni s kulturno normo, na primer s pričakovanji o skrbi za učence, o naklonjenosti učencem, empatiji, pripravljenosti pomagati in podobno. Pri socializaciji v poklic se torej na tak ali drugačen način naučimo, katera so tista čustva, ki se pri delu lahko ali celo morajo pokazati, in katera skrijemo, morda niti ne začutimo.

Pomemben del učenja v neposrednih delovnih situacijah je učenje iz napak, ki so neizogiben del človeškega delovanja (Rausch, Seifried in Harteis, 2017; Zhao, 2011). Primeri napak so denimo napačno naročilo v strežbi, napaka pri dodeljevanju zdravil v zdravstveni negi ali napačen vpis v seznam zbirke podatkov v uradništvu. Čustveni učinek napake pri delu običajno ni enoznačen, ob zavedanju, da smo naredili napako, lahko doživljamo kompleksen splet čustev (strah, krivdo, žalost) (Zhao, 2011). Prav negativno čustveno doživljanje je lahko pomembna motivacija za to, da se sproži proces učenja, vprašanje pa je, ali se delavec nauči bežati pred negativnimi čustvenimi učinki napak (denimo s prikrivanjem) ali pa ob zavedanju napake ugotovi, kako preprečiti ali zmanjšati pojavljanje napak v prihodnosti. Rausch idr. (2017) so v raziskavi zbirali dnevniške podatke neposredno od zaposlenih v nekem nemškem podjetju. Ugotovili so, da napake pri delu spremljajo negativna čustva (strah, jeza, krivda), pri čemer učinek teh čustev na učenje ni bil neposreden. Negativna čustva so bila povezana z vedenjem, ki je usmerjeno v soočanje s čustvi in samozaščitno ravnanje, ne pa k neposrednemu ukvarjanju s problemom (torej storjeno napako). Na to, da je imela napaka neki učni učinek, je vplivala zlasti poglobljena analiza napake ne glede na to, ali so jo udeleženci analizirali z namenom reševanja problema, lastne zaščite ali soočanja s čustvi. Hitro popravljanje napak ni pripomoglo k učenju. Rausch idr. (2017) predlagajo, da je neka stopnja tolerance do napak potrebna, da se delavci sploh ukvarjajo z njimi. Ob tem mora biti zagotovljena varna in sprejemajoča klima, ki omogoča poglobljeno analizo napake. Za manj učinkovite so se izkazale kratkotrajne rešitve z nereflektiranim popravljanjem napak.

Čeprav je učenje sestavni del vsakdanjega delovnega procesa, tako načrtovanega ali pa bolj spontanega in vezanega na dinamiko vsakokratne delovne situacije, pa je lahko tudi spodbujeno z nepredvidenimi zunanjimi dejavniki. Tako smo se v letošnjem letu mnogi soočili z nenadno spremembo v načinu dela zaradi ukrepov ob globalni pandemiji covida-19 in se učili novih pristopov dela na daljavo za vsaj minimalno doseganje predhodno zastavljenih delovnih ciljev. Učinke nenadne spremembe v neki avstralski delovni organizaciji zaradi obsežnega požara so proučevali Rooney, Manidi, Price in Scheeres (2018). V etnografsko zasnovani raziskavi so po požaru izvedli polstrukturirane intervjuje z zaposlenimi v prizadeti organizaciji. Sprememba je sprožila spontane in pozitivne čustvene in organizacijske učinke, ki so presegli predhodne poskuse, da bi preoblikovali in drugače zasnovali delo. Zaradi povsem materialne škode se je zgodil pomemben premik pri zaposlenih in v načinih dela v organizaciji. Zaposleni so poročali o izzivih obnove, ki je spremenila pogled na učenje pri delu, drugačen je bil zlasti čustveni vidik. Začetni šok in soočenje z izgubo sta nadalje spremljali vznemirjenje in navdušenje ob oblikovanju novih praks, ki so jih pred požarom s težavo vpeljavali zaradi »dolgočasne vsakdanjosti« (po besedah udeležencev). Rooney idr. (2018) so kot poseben prispevek raziskave navedli zlasti spoznanje, kako prepleteni so materialni vidiki dela, čustveni odzivi in učenje. Žal v tej raziskavi avtorji niso posebej jasno opredelili, kako so prišli do sklepov o t. i. afektivnih praksah (ang. *affective practices*), tako da ni povsem jasno razložen mehanizem čustvenega vidika opisane spremembe in učenja ob njej. Razvidno pa je bilo, da so bili učinki nenadnega požara močan motivacijski dejavnik za vpeljevanje spremembe in učenje novih praks na delovnem mestu.

Kot je bilo že omenjeno, so povezave med čustvi in učenjem na delovnem mestu deležne tudi kritične perspektive, ki jo predstavljata Benozzo in Colley (2012). Prva kritika se tiče privlačne ideje čustvene inteligentnosti na delovnem mestu, ki je lahko tudi nevarna, kadar obravnava učenje na ekonomsko-instrumentalen način, ki temelji na teoriji človeškega kapitala. S tem se močno povezuje drugi kritični pogled, in sicer, da se veliko literature s tega področja izogne obravnavi družbenega, kulturnega in političnega konteksta, značilnega za trenutni neoliberalni kapitalistični sistem. Ta s svojo predpostavko o skladnosti interesov med delavci in delodajalci zamegli krizo akumulacije kapitala in izkoriščanje dela, pri čemer je v delovni proces vse bolj vpeta osebnost delavcev skupaj z njihovimi čustvi (Benozzo in Colley, 2012). Avtorja čustva opredeljujeta kot diskurzivne in kulturne prakse, ki jih individualno usmerjene psihološke teorije običajno ne prevprašujejo, a so pomemben del vzpostavljanja in vzdrževanja odnosov moči. Slednji oblikujejo možnost in nabor čustvenega doživljanja – katera čustva so dovoljena in katera prepovedana.

Primer raziskovanja, ki vključuje socialni konstrukcionistični pogled na čustva in v ospredje postavlja odnose moči, je etnografska raziskava, v kateri je Sebrant (2008) ugotavljala, kakšen vpliv ima hierarhija v zdravstveni organizaciji na čustveno izražanje med zaposlenimi. Strah pred izgubo določenih nalog se je preoblikoval v jezo in nepripravljenost na spremembo v organizaciji dela. Pri tem je imelo denimo izražanje zavidanja drugačen

pomen za bolj vplivne skupine (zdravnike ali diplomirane medicinske sestre), ko je šlo za zamero do skupine, ki želi višjo stopnjo odgovornosti, medtem ko je bilo zavidanje pri manj vplivni skupini (srednja medicinska sestra ali zdravstveni tehnik) vezano na nekaj, česar nimajo in bi želeli imeti. V raziskavi se je tudi pokazalo, da so čustva v različnih situacijah na učenje delovala v dveh smereh. V nekaterih situacijah so spodbudila sodelovanje med strokovnjaki, v drugih situacijah so ovirala učenje in spremembe, še posebej če so bila spregledana, kot že omenjeno zavidanje (Sebrant, 2008).

Na podlagi jedrnatega prikaza izbranih teoretičnih in empiričnih raziskav o povezanosti čustev in učenja na delovnem mestu lahko torej ugotovimo, da različne vrste in oblike učenja na delovnem mestu neizogibno spremljajo tudi čustva, obenem pa se na delovnem mestu dogaja tudi učenje čustev skozi socializacijo. Ljudje, ki jih srečujemo in z njimi sodelujemo pri delu, tvorijo referenčno skupino, ki ima pri učenju neposredno kot tudi posredno vlogo. Neposredna vloga referenčne skupine je na primer v tem, ko se kot sodelavci vzajemno učimo drug od drugega, ko med mentorji in vajenci poteka izmenjava znanja ali ko prejmemo povratno informacijo o svojem delu od nadrejenih ali koga drugega. Posredno pa delujejo vsi udeleženi v tem procesu tudi kot socialna skupina, ki daje temeljni okvir za vzpostavljanje in ohranjanje socialne resničnosti v smislu socialne konstrukcije (Harré, 1986; Rimé, 2020).

RAZPRAVA IN SKLEP

Pregled literature je pokazal, da med čustvi in učenjem na delovnem mestu obstaja kompleksna vzajemna povezanost. Razjasnjevanje tega odnosa pa otežuje dejstvo, da so raziskave čustev pogosto razdrobljene glede na teoretsko izhodišče. Že o temeljni naravi čustev obstajajo pomembna teoretska razhajanja, še bolj pa je opazna razpršenost pristopov pri aplikativnih vedah. Raznolikost sama po sebi ni problematična, če raziskovalci eksplicitno in jasno navedejo, katero razumevanje čustev in učenja privzemajo pri svojem raziskovanju. Žal pa so opredelitve čustev in teoretične predpostavke v raziskovalnih besedilih pogosto nejasne (Hökkä idr., 2020). Kljub tej pomanjkljivosti pregled raziskav vendarle jasno kaže, da so čustva povezana z učenjem, in to velja tudi za učenje na delovnem mestu. Kompleksnost tega odnosa se razkriva skozi različne vidike. Učenje ne vključuje le kognitivnih elementov, ampak kot celovit proces povezuje raznolike razsežnosti bivanja, denimo telesne, čustvene, socialne, duhovne. Prav tako so čustva način vzpostavljanja posameznikovega odnosa s svetom, ki nima le afektivne in fiziološke komponente, ampak je izjemno povezan z našo kognitivno presojo in socialnim kontekstom. Posamezne raziskave in teoretska razmišljanja predstavljenih avtorjev kažejo na to, da so čustva pri učenju na delovnem mestu prisotna na različne načine: kot motivacijski dejavnik (npr. Rooney idr. 2018), kot dejavnik, ki spodbuja ali ovira učenje (npr. Rausch idr., 2017), pa tudi kot del oblikovanja poklicne identitete (npr. Oplatka, 2007).

Čeprav so bila čustva kot pomemben del učenja še pred kratkim pogosto spregledana ali pa ozko obravnavana kot nekaj negativnega, čemur se je pač treba izogniti, si učenja

na delovnem mestu ne moremo zamišljati brez spremljajočega čustvenega doživljanja. Čustva so po eni strani spremljajoči del učenja, lahko se razvijejo kot posledica nekega učnega procesa ali pa sprožijo kognitivno dejavnost posameznika in motivirajo za učenje v najširšem pomenu. Prav tako je smiselno poudariti, da so v kontekstu učenja na delovnem mestu čustva po eni strani obravnavana kot individualni pojav, ki spremlja učenje določenih vsebin, spretnosti, stališč. Po drugi strani pa se je treba zavedati, da je prav delovno okolje tisto, v katerem se naučimo, katera čustva bomo izražali in celo doživljali. Pričujoči pregled je pokazal tudi trenutno pomanjkanje celovitih teoretičnih modelov, ki bi jasneje razložili odnos med čustvi in učenjem na delovnem mestu. Ob vse večjem zanimanju znanstvene skupnosti za proučevanje tega področja lahko pričakujemo, da se bo v prihodnosti vendarle oblikoval bolj povezan in integriran teoretični model. Boljše razumevanje vloge čustev pri učenju na delovnem mestu lahko pripomore k boljši podpori tako izobraževalcem odraslih kot tudi drugim strokovnjakom na organizacijskem področju, s tem pa zaposlenim, da se bodo tudi sami bolj zavedali svojih čustev in njihovega vpliva v učnem in delovnem procesu.

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Barbara Samaluk

INTEGRATION AS A MULTI-WAY PROCESS: A CASE STUDY OF INNOVATIVE MIGRANT INTEGRATION PROJECTS IN SLOVENIA

ABSTRACT

This article explores innovative EU-funded migrant integration projects which emerged in Slovenia after the 2008 global economic crisis. It stems from sociological literature that conceptualises integration as a general societal phenomenon that shields against precarity. By conducting qualitative interviews with those running the studied projects and other stakeholders, this article explores the projects' drivers, tactics, and their impact on established institutions. The findings show that the projects were established by proactive activists who utilised EU funds to professionalise their activities and engage in partnerships to develop needs-based, cross-sectional and networked provision that empowers migrants and benchmarks professional norms and standards for migrant integration. Its specific contribution lies in uncovering a multi-way integration process that moves away from mainstream approaches to integration, which segregate and demand change only from migrants, and also includes public institutions and servants, professionals and host societies as a whole.

Keywords: *migration, precarity, integration, empowerment, EU projects, Slovenia*

INTEGRACIJA KOT VEČSMERNI PROCES: ŠTUDIJA PRIMERA INOVATIVNIH PROJEKTOV INTEGRACIJE PRISELJENCEV V SLOVENIJI – POVZETEK

V članku raziskujemo inovativne projekte integracije priseljencev, ki jih financira EU in so se v Sloveniji razvili po globalni ekonomski krizi leta 2008. Pri tem izhajamo iz sociološke literature, ki konceptualizira integracijo kot širši družbeni fenomen, ki varuje pred prekarnostjo. S pomočjo kvalitativnih intervjev s posamezniki, vpetimi v projekte, in drugimi deležniki raziskujemo vzvode projektov, njihove taktike in vpliv na uveljavljene institucije. Ugotovitve kažejo, da projekte s pomočjo sredstev EU razvijajo proaktivni aktivisti z namenom profesionalizacije teh aktivnosti in oblikovanja partnerstev za razvoj povezanih in medresorskih storitev, ki bi izhajale iz potreb priseljencev in bi bile namenjene njihovemu opolnomočenju, ob tem pa bi vzpostavili profesionalne norme in standarde za integracijo migrantov. Posebni prispevek članka je v razkrivanju večsmernega integracijskega procesa, ki se odmika od prevladujočih integracijskih pristopov, ki segregirajo in zahtevajo spremembe zgolj od migrantov, ter tako vključuje tudi javne institucije in uslužbence, strokovne delavce in družbo gostiteljico kot celoto.

Ključne besede: *migracije, prekarnost, integracija, oplonomočenje, projekti EU, Slovenija*

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INTRODUCTION

This article investigates innovative EU-funded migrant integration projects that emerged in Slovenia after the 2008 global economic crisis. It conceptualises integration as a link between stable work and durable social relations achieved through welfare states' compromise that shields against precarity, i.e. fundamental insecurity characterised by unstable working, employment and living conditions caused by increasing globalisation, labour market deregulation and the shrinking welfare state (Castel, 2003; Schierup & Krifors, 2015). Integration is thus understood not as an interventionist model for specific groups but as a general societal phenomenon that is no longer the norm for an increasing number of individuals (Bolzman, 2002). Although neoliberal attacks on welfare states' compromise have eroded the rights and protective mechanisms for a growing number of residents, the situation is even more precarious for migrants because it is indirectly linked to increasingly restrictive migration policies (Anderson, 2010; Bolzman, 2002) and the segregated integration models explored below.

Across the EU migrant integration is regulated upon the interaction of (supra-)national migration and welfare policies, specific labour market structures and migration histories, which determine the inclusion/exclusion of specific migrant groups and their rights, which are most often clearly separated from prior resident's rights and from general welfare provision (Carmel & Cerami, 2012; Zorn, 2008). In this regard the EU and its member states clearly distinguish between prior residence and EU-citizens on the one hand and non-EU, Third Country Nationals, on the other. The latter are subject to migration law that determines their inclusion/exclusion into the welfare state's compromise, mostly based on their economic utility and security potential, however, there is also a more genuine interest in the social integration of migrants. These rationales also shape EU and national migration policies and its funding mechanism, which can at the EU level come in the form of wider structural or specific Home Affairs funds (Hertog, 2016; Samaluk & Kall, forthcoming).

While research has already scrutinised the impact of EU financial mechanisms on national and local actors in welfare administration and provision as well as on innovative service provision (Greer, Samaluk, & Umney, 2019; Samaluk, 2017a, 2017b; Samaluk & Kall, forthcoming), we still know little about innovative EU-funded integration projects. This article explores the drivers of these projects, their tactics, and their impact on the established institutions and their integrational service provision. The article is structured as follows: first, it presents a literature review on EU and Slovenian migrant integration governance and provision, then it presents the case study selection and methods used, followed by the presentation of findings and finally the concluding section summarises the findings and presents the article's main contributions.

EU GOVERNING MECHANISMS REGULATING THE INTEGRATION OF MIGRANTS

Migrant integration across the EU is regulated upon the interaction of (supra-)national migration and welfare policies, specific labour market structures and migration histories. Migrant integration thus represents a mix of different policy domains, such as migration, education, social and labour market policies embedded within national political economy and supra-national modes of governance (Morrice, Shan, & Sprung, 2017; Papadopoulos, 2012). Both common EU and specific national governance thus determine the inclusion/ exclusion of specific migrant groups and their rights, which are most often clearly separated from prior resident's rights and from general welfare provision (Carmel & Cerami, 2012; Zorn, 2008). In this regard, EU governance has also always distinguished between intra-EU migration characterised by freedom of movement that is outside of migration law, and the migration of non-EU citizens, i.e. Third Country Nationals (TCNs). These legally defined categories are further distinguished as economic, political, and undocumented migrants, and according to these categorisations either included or excluded from the welfare state's compromise (Gregorc, Brajkovič, & Šoštarič, 2012). While the entry and rights of TCNs are mainly conditioned upon their economic utility and security potential, there is also a more genuine interest in the social integration of migrants.

Migration governance in the EU is thus an assemblage of interlinked political, institutional and discursive logic of security, utility and also (specific and limited) social integration (Carmel, 2012). Since the 2000s there have been attempts to address migrants' specific relationship to the labour market and welfare provision also by giving greater priority to migrant integration in social inclusion policies, which encompass (adult) education and learning as well (Carmel, 2012). As a consequence, the Europe 2020 strategy envisages better integration of migrants in the workforce and the development of "a new agenda for migrants' integration to enable them to take full advantage of their potential" (European Commission, 2010, p. 18). In order to implement migrant and wider social integration policies the EU also has financial mechanisms in the form of structural and specific funds. Amongst these are the European Social Fund (ESF), broadly aimed at reducing poverty and increasing the social inclusion of various vulnerable groups, and specific Home Affairs funds, more concerned with border control, shared management, resettlement and integration of TCNs (Hertog, 2016; Samaluk & Kall, forthcoming). The ESF and Home Affairs funds also fall under separated policy domains within the EU member states, the former under Social Affairs and the latter under Internal Affairs administration, funding, and provision. It is thus important to scrutinise how these funds affect national provision and implementation, especially in new EU member states, whose social, educational, employment, economic and migration policymaking has only recently become embedded into EU governing mechanisms (Carmel & Cerami, 2012).

Research has already scrutinised the impact of EU governing, including that of its financial mechanisms upon national and local actors in welfare administration and provision, which has had particular implications for the new EU member states that started

integrating since 2004 (Bonnet, 2016; Greer et al., 2019; Samaluk, 2017a). Recent EU integration characterised by institutional adjustment and the need for an increased bureaucratic apparatus was quickly met with the 2008 global economic crisis, which led to budgetary constraints. Research shows that in the post-crisis Slovenia, EU funding started acting as a stabiliser for austerity measures, thus replacing integral with temporary EU funds to finance welfare provision (Kump, 2017; Samaluk, 2017a). This stimulated a shift towards project governance, its temporary project-based work organisation with predetermined external funding, timeframes, workers' roles and tasks, broadly defined as projectification (Greer et al., 2019). This has spread the insecure project-based modes of work organisation to the public sector, which consequently became characterised by unsustainable provision and precarious project work, hindering permanent entry into welfare professions (Greer et al., 2019; Samaluk, 2017a).

Nevertheless, EU integration and its financial mechanisms also brought new opportunities and have stimulated much needed innovative responses to growing problems caused by increasing labour market interdependencies and the economic crisis (Samaluk, 2017b; Samaluk & Kall, forthcoming). For instance, in Slovenia a new generation of trade union activists started addressing the growing precarity of non-unionised precarious workers and wider social groups by utilising EU funds (Samaluk, 2017a). While these new external resources were brought to innovative trade union project-based organisations, which introduced innovative organising of precarious workers and wider social groups, including migrants, their maintenance came with high personal costs linked to uncertain funding and consequent precarity (Samaluk & Kall, forthcoming).

However, we still know little about innovative EU-funded migrant integration projects. This article explores the drivers, tactics, and impact of such projects in Slovenia by asking the following questions: 1) What drives innovative EU-funded migrant integration projects? 2) What tactics do these projects employ to address the complexity of the integration process? 3) What is their impact on the established institutions and their service provision?

SLOVENIAN MIGRANT INTEGRATION POLICIES AND PROVISION

As is the case in the rest of the EU, Slovenian migration policies are also mainly based upon security and economic utility, utilising migrant workers when shortages arise, but at the same time limiting their stay and their inclusion into social protection systems (Medica, Lukić, & Kralj, 2011). Slovenia has formally instituted a pluralistic (multicultural) model of integration, which should grant migrants equal inclusion into Slovenian society while enabling the preservation of their cultural identities; however, these principles of equality are not achieved in practice (Medica et al., 2011; Zorn, 2008), as will be shown below.

The management of migrant integration policies falls predominantly (but not exclusively) under the Ministry of Internal Affairs (MIA) that distinguishes between economic

migrants, asylum claimants, and persons with international protection; according to these categories, it provides differential inclusion through integral as well as special external funds. Between 2007 and 2013 the financial perspective integration of TCNs was managed through two separate funds, the European Fund for the Integration of non-EU immigrants (EIF) and the European Refugee Fund (ERF). Between 2014 and 2020 both fell under the Asylum and Migration Integration Fund (AMIF). The provision of integration programs for migrants is divided between state institutions and various non-governmental, non-profit, and private providers.

The main state institutions of control for TCNs are asylum and detention centres that distinguish between claimants for international protection and economic migrants; in Slovenia they were also established with EU funds (Čebron & Zorn, 2016). The system of segregated housing for asylum claimants and undocumented migrants comes also with an internal system of social and healthcare services, which results in exclusion from general welfare provision (Zorn, 2008). Welfare professionals beyond these centres thus rarely encounter complex problems that migrants face because of external and internal border regimes and only start dealing with them once migrants gain access to general welfare institutions after they are granted refugee status, permanent residence, or citizenship.

Those who have been granted international protection are in their first year placed into an Integration Home and allocated a consultant for integration to assist them in this process. The main pillars of migrant integration consist of Slovenian language learning, intercultural dialogue, the solving of life situations, and assistance with finding accommodation and employment (Ladić, Bajt, Jalušič, & Kogovšek Šalamon, 2017). There are also some special programs for the integration of particular groups of migrants, such as youngsters, women and parents that are provided by NGOs or *Ljudske univerze*, which are otherwise major providers of Slovenian language courses for migrants at the local level (Vrečer & Očkon, 2014). Despite this initial provision of services, many face difficulties in achieving social and labour market integration.

Contrary to Home Affairs management and provision, the management of general welfare provision falls under the jurisdiction of the Ministry of Labour, Family, Social Affairs and Equal Opportunities and is covered by integral funds and the European Social Fund (ESF), broadly aiming at the social inclusion of various vulnerable groups. Migrants have also been recognised as a vulnerable group within the National Social Protection Program 2013-2020 and the National Program for Adult Education 2013-2020. Nevertheless, the actual provision of social inclusion programs for migrants is still very limited. These have initially developed not as specialised programs for migrants but as a response to neoliberalisation and the increasing impoverishment of residents, such as programs for the homeless and persons without healthcare insurance (Zorn, 2008). This new service provision has also been increasingly utilised by migrants, who during the economic crisis were first targeted for dismissal and consequently deprived of their residence and social rights (Medica et al., 2011).

Poor bilateral agreements, the quota system, the temporal limitation and linkage of migrants' work permits to one employer and the lack of norms and regulations concerning the standards of living in residential facilities allowed employers to determine the circumstances under which migrants lived, worked and what access to rights they had upon dismissal (Medica et al., 2011). Most of these migrants worked in construction and were from former Yugoslav republics, mainly Bosnia and Hercegovina, who have been historically drawn to Slovenia. As a response to the economic crisis, the Government further restricted the employment of TCNs in 2009 and conditioned their entry into the labour market only if no suitable candidates could be found amongst unemployed Slovenian or other EU/European Economic Area (EEA) citizens (Pajnik & Bajt, 2011).

The discourse surrounding the economic crisis thus also problematised the category of "economic migrants", who were only admitted as long as they brought economic benefits, but were otherwise presented as a threat to the shrinking job market and the welfare state. This has further escalated during the "refugee crisis", where a discursive distinction between seemingly genuine refugees and exploitative "economic migrants" became even more pronounced. This discourse has characterised the EU's and the Slovenian government's responses towards the opening and closing of the temporary corridor that emerged on the Balkan migration route in 2015 and the admittance of only certain TCNs, who were characterised as "genuine refugees" and thus included in European asylum politics (Brumen & Meh, 2016).

Although Slovenia mainly acts as a transit country, it also has one of the lowest rates of granted protection in Europe. Between 2002 and 2018 Slovenia granted international protection to only 779 persons out of 13,599 applicants (Statistični urad RS, 2019). While in 2010 there were 73,962 valid work permits issued to non-EU/EAA nationals, in 2014 this number amounted to only 22,853, and 16,993 in 2016, but it started rising again in 2018 following increased economic growth (Zavod Republike Slovenije za zaposlovanje, 2020). Although the number of migrant workers shrank in 2014 to that of one third in 2010, construction still predominates in the employment of migrant workers, many of whom have later become posted workers in Germany or Austria (Sindikat delavcev gradbene dejavnosti Slovenije, 2015). The above-mentioned circumstances of precarious migrants would not have been detected if it were not for the proactive engagement of activists and the projects explored in this article.

CASE STUDY SELECTION AND METHODS USED

In Slovenia one can find small-scale grassroots alternative approaches to migrant integration and migrant self-organising, which have mainly developed in Ljubljana's Social Center ROG. Most notable in this regard has been the collective Invisible Workers of the World (IWW), who had started exposing the precarious conditions of migrant workers already prior to the economic crisis. ROG has also played an important role during the "refugee crisis", which brought about the establishment of the Antiracist Front Without

Borders at the end of summer 2015, whose actions have encompassed solidarity protests, activities on the borders of the Balkan route, and organising activities with asylum seekers in Slovenia (Pistotnik, Čebron, & Kozinc, 2016). While these self-organised groups played an important role in exposing violations and fostering self-organisation, they were small scale, rarely had funding supporting their activities, thus making it difficult to sustain and professionalise them. Linked to these self-organised groups were also two innovative projects that emerged after the 2008 economic crisis and seized newly available EU funds to professionalise their activity in order to address complex migrant issues in a more systemic fashion. These are the Migration Office in Ljubljana and the Urban Farrows in Maribor, which are the selected case studies explored in this article.

The article is based upon the analysis of 15 in-depth individual or group interviews with 18 participants: activists of self-organised groups, public servants/policy makers at ministries, providers of social protection programs that intersect with migrant issues, and leaders and workers on EU-funded integration projects, which include trade unions, NGOs and public bodies. The interviews lasted between one and two hours. Apart from the analysis of primary sources of data, this article also leans on secondary sources such as project reports and policy documents. Fieldwork was conducted in Slovenia between May 2014 and October 2015, with some follow-up interviews in 2018 to gather additional data. All interviews were recorded, transcribed and analysed through the process of coding later organised into themes (Strauss & Corbin, 1990). The analysis started with primary sources of data and later included a thematic analysis of secondary sources of data thus enabling triangulation amongst different data sources. The findings are presented below.

INNOVATIVE MIGRANT INTEGRATION PROJECTS IN SLOVENIA

The findings reveal that innovative migrant integration projects were driven by the proactive engagement of devoted activists and newly available EU funding streams that allowed for the professionalisation of grassroots activities and bottom-up, multi-way, complex, networked and cross-sectional approaches to migrant integration.

Drivers Enabling the Professionalisation of Grassroots Activities

The 2007-2014 EU financial perspective represented the first perspective in which Slovenia participated in full. It opened up a new funding stream for integration activities initiated by proactive activists. The studied projects emerged owing to proactive activists, who took the opportunity to utilise the newly available European Social Fund (ESF) and the European Capitals of Culture (ECOC) fund, which both allowed for bottom-up and longer-term projects.

As explained by one of the project leaders at Maribor's City of Culture's Urban Furrows (UF), this funding stream offered autonomy to frame the project in a way to encourage self-organisation and empower, educate and support specific, including migrant, groups:

> This was financed by ECOC. Urban Farrows were one of the four streams… that covered socio-ecological issues […]. I had complete autonomy when applying to tender […]. We tried to offer support to people […] and at the same time educate them about mechanisms […] we never wanted to become service providers […] but worked on establishing self-organised structures. (UF, project leader)

Urban Furrows was designed bottom-up as one of the four streams within the ECOC project, which focused on ecological and social issues and comprised of seven ecological and socially engaged interconnected projects. Amongst the latter were Etnomobil, Digitalno Nomadstvo, and Teleport, which also started engaging with precarious migrants. Their primary focus was thus on the process of community building and self-organising, which initially entailed proactive social movement and militant research tactics:

> In the first four months […] we talked to people. We went to singles' homes, integration houses, parks, construction sites. We introduced ourselves and explained what we do. Sometimes people trusted us, sometimes they didn't. This was hard work. To present our work not as a service, but as a common support […], cooperation really. (UF, project leader)

As part of their proactive tactics, activists visited sites where migrants resided or worked to learn about the issues they faced and to start building a supportive community for self-organising.

The same approach was used by another grassroots initiative that developed in the city of Ljubljana a couple of years earlier, owing to a proactive trade union activist:

> The beginning of Migration Office dates back to 2008/2009, when we started visiting singles' homes […] At that time, together with [an NGO] we started visiting these homes to assess the situation and show that these people are not only economic beings. (MO, project leader)

Although within big construction firms trade unions already represented migrant workers (Samaluk, 2017b), they lacked proactive engagement. This was then introduced by a new generation trade unionist, who started exposing, in cooperation with NGOs, broader violations against migrant workers. These tactics initially increased media exposure and public awareness of the unacceptable living and working conditions of migrants, but this alone did not help them: "When we exposed the story in 2008, there was a big media response, but what can workers do with that […]. This was the moment when we decided that we need to work in a more systemic fashion" (MO, project leader).

Trade union activist realised that exposing the problems was not enough and that a more systemic approach was needed to assist and empower migrant workers, who in the wake of the economic crisis faced dismissals and consequent further erosion of their employment

and social rights. With this goal in mind, it transformed its informal cooperation with the above-mentioned NGO into a project partnership on a newly available ESF scheme supporting bottom-up social inclusion projects for various vulnerable groups: "this is how the Integration package for unemployed migrants, refugees and asylum seekers came to be." (MO, project leader)

The utilisation of ESF resources allowed unions and NGOs to frame migrant integration within a broader social inclusion framework that allowed for more wholesome and cross-sectional addressing of complex status, housing and social problems faced by dismissed migrants.

Both ESF and ECOC also covered employment costs, which led to the professionalisation of their activities. Migration Office used this resource to employ workers with migration backgrounds, who had first-hand experience, suitable language skills and knowledge of often invisible migrant networks and whereabouts:

> The project employs migrants […]. We knew where these people reside… former refugee centres, singles' homes […]. The first month we visited those, then we heard from other migrants about other locations […]. In a couple of months, we were familiar with these locations throughout Slovenia […], then we visited meeting places, construction sites. (MO, project worker)

This approach has further strengthened MO's proactive organising efforts not only in Ljubljana but across Slovenia. They also ended up cooperating with Maribor's Urban Furrows.

When the effects of the economic crisis started kicking in, migrant workers became the first targeted for dismissal and therefore both Migration Office and Urban Farrows initially focused on advocacy work:

> When Maribor's traffic enterprise went down, we stopped about 15 deportations […]. With the help of Migration Office, we managed to postpone deportation procedures […]. At the same time the MO was pushing for the dismissed workers to gain their right to unemployment benefits. This was crucial since unemployment benefits equal a regular income, which enabled migrants to regain their right to reside in Slovenia. (UF, project leader)

Dismissed migrants thus received quick support that prevented their deportations and enabled them to re-regularise their residence status and consequently regain access to their social and employment rights. The tactics to achieve that also involved several interventions at administrative units, which initially did not take migrants seriously: "We intervened. We accompanied them to the Bureaus for Aliens because they told us that public servants don't take them seriously […] [and] we've noticed the difference… the attitude towards migrants has changed." (UF, project leader)

Direct interventions were effective and have resulted in the changed attitudes of public servants, whose administrative decisions were determining the migrants' access to their rights. The advocacy work of Migration Office has been even more systemic and entailed daily cooperation with employers, various public institutions and other organisations, particularly watchdogs and law enforcement bodies, to whom it reported 160 cases of the violation of employment, tax, criminal and other legislation in 2014-15 alone (Samaluk, 2017b). Owing to its long-term systemic advocacy work Migration Office also influenced legislative changes that led to better protection of migrant workers (Samaluk, 2017b).

Building Alliances and Partnerships to Address Emerging Needs

Through their advocacy work and cooperation with various actors Migration Office also uncovered emerging needs and forged further partnerships on a (trans)national level. These partnership projects turned Migration Office into a project-based organisation supported by a portfolio of diverse (trans)national partnership projects financed through the ESF, Fair Mobility Network, and the resources of German trade unions (Samaluk & Kall, forthcoming). This funding, combined with changing needs, also expanded their focus on various diverse migrant groups, including posted workers, undocumented migrants, migrant workers within transnational transport, female migrant workers, refugees and asylum seekers (Samaluk, 2017b).

On the national level they built fruitful cooperation with the Info Point for Foreigners, established in 2009 at the public Employment Services of Slovenia (ESS), also with the support of ESF. Their main goal was to provide information to affected migrants, who had neither the knowledge nor capacities to find their way through the whole web of various institutions to gain information about their status and rights and thus even begin resolving their complex situation. Info Point (IP) thus acted as "a sort of crossroad that covers a very wide area" (IP, project leader) and provided connections to other relevant institutions, who were important stakeholders for resolving migrants' complex issues. While as a public institution, the Info Point was obliged to provide provision within their limited jurisdiction, their project partnership with trade unions made very complex and networked provision possible, including information, counselling, advocacy and representation:

> If we provided information and counselling, trade unions were advocates, they accompanied the client […] wherever it was discovered that workers were unlawfully unregistered, or they accompanied workers to report employers to the Labour Inspectorate, they resolved residency issues. (IP, project worker)

In 2013 Migration Office was also contracted by the Info Point to provide services related to migrant empowerment and advocacy. This strategic partnership enabled the rapid resolving of the complex problems of migrants: "When they had unresolvable cases, they called us, they referred many people to us. And we also called them to inquire what is in the system, what is happening with a person's work permit." (MO, project worker)

While trade union activists did not have access to the information kept in state registers, these could be provided by the Info Point, and while it could not do advocacy work, trade unions could. This partnership thus enabled rapid reactions to the migrants' changing needs.

Close cooperation also increased professionalisation within the ESS, who initially lacked the know-how, appropriate staff, and networks:

> The beginning was very difficult […][;] first the team needed to be put together, we needed to find the right staff […] then the content needed to be developed […][;] the first project leader was not good, the second started changing things because she knew how to connect with trade unions, NGOs. And there was a whole network of public institutions involved, we had direct contacts with people regarding health insurance, pension insurance […]. A user who came to us immediately got an answer to their questions, which were often complex and sometimes also banal. (Leader of the ESS project Info Point)

Close cooperation amongst innovative projects and public institutions thus also increased institutional capacities to provide migrants with helpful information and assist them with complex issues.

Additionally, Urban Furrows worked on establishing close cooperation with various stakeholders: "We worked on a tripartite structure, on the base, meaning people, on established institutions and other actors […] and on an intermediary level […] we tried to encourage all to participate in talks, events […] to establish an alternative […][,] parallel structures." (UF, project leader)

They tried to involve all possible stakeholders in their attempt to build alternative approaches to migrant integration and through their proactive engagement also became recognised as capable actors whose services were procured for other projects. For instance, they became a subcontractor for an NGO after they exposed the problems faced by refugees relocated from Malta to crisis hit Maribor in 2010 as part of the Intra-EU Relocation of Refugees from Malta (EUREMA) project:

> We are talking about an EU project that had been approved one year before […] but it was complete chaos here… banks refused to open bank accounts for them […] [and] Social Work Centres rejected their claims for social benefits because the Ministry of Internal Affairs failed to inform these people that they have refugee status. Subcontractors were hired […][,] one NGO […] that could not cover Maribor so they hired us […] for advocacy […][.] One institute was supposed to assist them with labour market integration […] but the refugees told us that they openly told them that there is a lack of demand and that people are without jobs […] so the refugees quickly recognised that they were being manipulated so that the Ministry of Internal Affairs could brag about cooperating on an intra-European migration project. (UF, project leader)

Even though this was a coordinated project that also allocated funds for the coordination activities of various actors and providers, nothing worked and caused serious ills to incoming refugees. Urban Farrow's proactive tactics and engagement with top-down Internal Affairs projects thus also revealed the pitfalls of mainstream European approaches to migrant integration burden sharing.

Urban Farrows were thus trying to involve various public institutions dealing with these refugees and other migrant and social groups they worked with, but apart from local Employment Services of Slovenia (ESS) they encountered resistance from public institutions:

> We encountered a lot of resistance, we approached all institutions […], but apart from ESS, who were always open to talks, to make public statements and criticise the system [no one engaged] […][.] ESS helped us with EUREMA to expose the institutional dimensions […][and] they revealed […] that the ministry failed to do its job […] and that they had problems because they lacked sufficient information. (UF, project leader)

Although they approached all relevant public institutions, they cooperated closely only with the local employment services, who were critical towards poor management and systemic flaws, and open to alternative approaches. Also, these alternative approaches then made further common partnership projects possible: "They supported us at all levels, we worked hard to increase cooperation, so they can expose more alternative approaches through us and that we get further financing with their partnership." (UF, project leader)

As was the case with Migration Office, fruitful cooperation and further partnership projects with the ESS enabled the development and further financing of alternative approaches.

Focus on Empowerment and Education

Both projects also focused on the empowerment and education of migrants, activists, and institutions. As explained by an Info Point project worker, public institutions often lack the know-how to assist migrants with complex issues that fall under several policy domains:

> A big problem seems to be that administrative workers are not well informed […][.] These are complex things, and an act of deregistration can cause great harm to migrant workers. There is too little sharing of information and cooperation amongst all those who are involved in these problematic […] 7-8 institutions and their employees […][.] In my opinion it is not only a problem that migrants lack information, but that the people who are involved in this issue lack knowledge. (IP, project worker)

Due to this structural institutional incapacity to deal with the complex issues of migrants, both MO and UF also went some way to educate public servants. Urban Farrows

had already adopted a pedagogical approach at their direct interventions, educating administration clerks on what practices to adopt to actually assist migrants within the established legal framework: "We educated them on what they can and cannot do. We published an information booklet. A combination of law and their strategies. The law says this, but you do that. Therefore, we advise you to change your practice." (UF, project leader)

With that aim in mind they also published an information booklet in several languages including Slovenian. While the other languages were intended for migrants, the Slovenian version was targeted at institutions to reflect on their poor practices towards migrants with diverse statuses: "We published it in four languages […] [and the] Slovenian language was primarily for institutions, because we recognised that there are many servants who don't have a clue." (UF, project leader)

Furthermore, Migration Office organised events for institutions, trainings for activists/volunteers, workshops for migrants, and prepared various multi-lingual publications tailored to specific migrant groups, such as migrant workers, posted workers, refugees and asylum seekers (Svetovalnica za migrante, 2015). They taught migrants about their rights, work, and violations and about assistance points:

> We taught them what it means to work in Slovenia, how to go about finding employment, what violations they can face, what are the symptoms, what is permitted and what isn't, what is illegal work, what is voluntary work, and of course [we gave them] our contact information if they need anything. (MO, project worker)

They used various educational methods, such as trainings and workshops, but also less conventional ones, such as illustrations and social media, in order to make sure that the information was properly understood and reached diverse, multi-lingual migrant groups (Samaluk, 2017b). Moreover, they broadened migrants' social networks and assisted with their labour market integration: "In these years I assisted around 15 people to find work. I started […] involving people as volunteers because this is the best way to expand their network of acquaintances […] and to get the sense of environment and start integrating in it." (MO, project worker)

Urban Farrows also organised empowerment workshops to increase migrants' networks and educate them on how to use information-communication technologies to find useful information: "We introduced them to established networks, such as Invisible Workers of the World […]. We introduced them to their webpage and useful information there, which comes from workers themselves." (UF, project leader)

All in all, both projects approached integration as a multi-way process, empowered migrants through education and network building, and benchmarked professional standards for a networked, cross-sectional, and complex service provision.

Unsustainable EU Project Funds and Changing Priorities

Both integration projects were relying on unsustainable EU funds, which had limited timeframes and were linked to financial cycles with specific priorities. The ECOC funding of Urban Farrows lasted for two and a half years and later all its projects became integrated into the Centre of Alternative and Autonomous Production (CAAP), established in 2012, where the already mentioned new partnership projects with the ESS enabled the continuation of their work with specific vulnerable groups. Nevertheless, reliance on project funds also encourages internal competition, which CAAP tried to overcome, not always successfully, and that caused frustration, fluctuation and even the exits of leading activists:

> We established CAAP and there was a lot of talk… how we could fairly compete on the market […]. [The competition is] brutal. This is why I left the NGO scene […]. When new projects came, we also […] faced internal competition […]. We tried to establish a fairer system within an unfair system, but this did not always work. (UF, project leader)

Also, Migration Office's core reliance on ESF, which lasted for five continuous years, compromised its work in 2015, when the European financial cycle and its funding priorities were coming to an end. Within the new financial perspective, the integration of TCNs and asylum seekers was removed from the ESF and moved exclusively under the Home Affairs Fund AMIF: "ESF is now key for the area of training, for this type of inclusion, while AMIF is for their [TNCs] integration […]. With ESF we can do long-term stories, AMIF is more short-term" (policy maker 1).

This shift in funding priorities marks a return to the mainstream approach to migrant integration marked by short-termism and the strict divisions of tasks and financing among diverse, yet interrelated policy domains, which is further enforced through EU funding rules: "On the EU level there should be no duplication of content, there should be no double financing." (policy maker 1)

In this regard another policy maker explains that these regulations for the usage of funds are "about ticking the box" and in practice cause that several ministries "deal with migration, but no one really" (policy maker 2). While policy makers do realise that there are needs for more complex service provision, this is hindered by rigid rules as well as a lack of agency and political will to defy them.

Therefore, attempts by Migration Office and its partner Info Point for Foreigners to convince policymakers to include social integration of TCNs into the future ESF perspective as well were unsuccessful. As a result, Info Point closed down in September 2015, creating a void that can again be exploited by some employers: "Unscrupulous employers are the ones who are very happy about Info Point closing down, they now again became the only source of information for their employees." (IP, project leader)

It was not rare that migrant workers were charged by employers to sort out their documents and Info Point could intercept these criminal offences and report them to law enforcement. Moreover, the ending of the project also meant the loss of experienced staff who had already developed the know-how and established networks, which are rare within public institutions: "I simply cannot understand the rationality behind it […]. They will now start developing the network from scratch […] [and] they will have to learn everything from scratch." (MO, project leader)

Moreover, the inability of policy makers to turn these projects into more sustainable programs also forced Migration Office to stop working under the trade union umbrella and become an NGO. Until the end of that year, Migration Office was supported by the confederation, but then lost its funding and project workers. Nevertheless, its survival was ensured by its leader, who was prepared to start anew and in January 2016 turned Migration Office into an independent NGO. Under the name of Workers' Counselling Office, it has employed new workers and today successfully continues its work with a slightly broader focus on all vulnerable workers and wider social groups.

DISCUSSION AND CONCLUSION

This paper has explored innovative migrant integration projects in Slovenia that have been developing under wider EU governance and its funding mechanisms. The findings show that broader EU funding streams, which offer long-term financing and are not specifically targeted at the integration of TCNs, drew the development of innovative approaches to migrant integration initiated by proactive activists. These approaches have been characterised by fruitful partnerships, which enable needs-based, cross-sectional, and networked provision that empowers migrants and increases their rights to participate in welfare states' compromise. As a consequence, these innovative approaches also benchmarked professional norms and standards for the protection and integration of migrants, and as such also increased institutional capacities and the know-how to deal with complex and cross-sectional issues faced by various categories of migrants. This article thus contributes to critical adult education research, which understands integration as "a two-way process involving mutual accommodation and change" not only on the part of migrants but also host societies (Morrice et al., 2017, p. 130). Its added value is especially in emphasising the need for a *multi-way integration process* that includes not only migrants but the relevant institutions, public servants, professionals, and host societies as a whole. The focus on these innovative projects revealed serious institutional incapacity to address complex migrant issues and thus the need to move away from segregated mainstream approaches and to educate public servants to offer networked, cross-sectional provision that will not hinder but increase migrants' rights and capabilities for integration.

While the studied projects offered an innovative example of how this can be achieved, their core reliance on EU funding streams made them unsustainable or reliant on the work of a few devoted leading activists. This article provides new evidence to existent research

(Samaluk, 2017b; Samaluk & Kall, forthcoming), showing that EU funding fosters innovative yet unsustainable approaches to migrant integration. The limited timeframes of the EU funded projects and their changing priorities thus resulted in the loss of established networks, capacities, and know-how. In this regard the findings show that the shift in EU funding priorities was marked by a return to the mainstream approach to migrant integration. Although policy makers have recognised the needs and were in principle supportive of these innovative projects, clashes over jurisdictions and funding streams and bureaucratic rules for the usage of European funds initiated a return to mainstream approaches to migrant integration characterised by segregated funding and provision that acts more as a box ticking exercise for pre-set services than as needs-based support for migrants facing complex issues.

This article thus contributes fresh insights to existent research on EU's migrant integration policies (Carmel, 2012; Carmel & Cerami, 2012). It shows that these need to move beyond the rationale of economic utility and security, towards multi-way integration across policy domains and service provisions. This entails various categories of non-EU migrants becoming and staying included within broader social affairs policy domains supported through the ESF and other non-home affairs EU and integral funding streams. Moreover, the article demonstrates that as in the area of broader welfare provision (Greer et al., 2019; Samaluk, 2017a), the reliance on EU funding alone cannot secure the continuous provision of complex services needed for a multi-way integration process. There is thus a need to integrate these innovative approaches into regular, integrally funded provision. While this research was done some time ago and within a rapidly changing context, its findings are still relevant today as they reveal new opportunity structures and innovative tactics for a multi-way, holistic and non-essentialist integration process needed to address the issues emerging within our increasingly diverse and multicultural societies.

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PODPORA MENTORJEM PRI PRAKTIČNEM USPOSABLJANJU VAJENCEV

V Sloveniji se je leta 2017 začela poskusno uvajati vajeniška oblika izobraževanja v programih srednjega poklicnega izobraževanja. Za vajeniško obliko je značilno, da se mladi vsaj 50 % časa trajanja izobraževanja, kar nanese vsaj 55 tednov, usposabljajo v podjetjih, kjer se izvajata praktično usposabljanje in del strokovnih vsebin izobraževalnega programa. Vajeniška oblika se uvaja kot alternativa t. i. šolski obliki poklicnega izobraževanja, obe vodita k istemu cilju, ključna razlika med njima je, da vajenci več časa kot dijaki preživijo v podjetjih. Posledično vajenci v podjetjih usvajajo tako teoretična znanja kot veščine in spretnosti.

Dejstvo je, da je dinamika učenja na delovnem mestu drugačna od dinamike učenja v šoli. Kot kažejo sodobne teorije učenja v organizacijah, se učenje na delovnem mestu odvija v največjem delu kot priložnostno učenje (Ličen, 2018). Takšno učenje poteka v dinamičnem odnosu med učnimi procesi zaposlenih in skupnostjo zaposlenih, podjetjem kot tehnično-organizacijskim sistemom ter posameznikom, ki vstopa v ta sistem kot novinec in ob podpori mentorja. Vajenec s postopnim vključevanjem v delovne procese hkrati razvija poklicne veščine, se postopno uči uporabljati znanje za reševanje poklicnih izzivov in se kot osebnost transformira (Mikulec, 2018). Teoretična izhodišča potrjuje tudi evalvacija poskusnega uvajanja vajeništva, ki smo jo na Centru RS za poklicno izobraževanje (CPI) izvedli julija 2020. Vajenci so v intervjujih povedali, da so se v podjetjih največ naučili v neposrednem delovnem procesu, kjer so jih mentor in/ali preostali zaposleni pri delu spremljali, jim dajali sprotno povratno informacijo ter jih opozarjali na morebitne napake. Poleg tega je večina vajencev kot pozitivni vidik usposabljanja na delovnem mestu poudarila, da so se učili skozi delo ter da jih je kolektiv sprejel in jih jemal kot enakovredne zaposlenim (Klarič, 2020).

Potencial učenja na delovnem mestu je izjemno velik, toda ne uresniči se sam. Razviti je treba mehanizme v podporo mentorjem pri izvajanju praktičnega usposabljanja v podjetjih. V ta namen na CPI pripravljamo gradivo za mentorje, v katerem bomo predstavili načine izvajanja didaktične podpore pri učenju v neposrednem delovnem procesu.

Namen smernic je dvojen:
1. Mentorjem in drugim zaposlenim predstaviti različne metodične pristope (načine dela) k načrtovanju, izvajanju in spremljanju delovnih opravil, ki jih izvajajo vajenci v podjetjih.
2. Poudariti prepletanje osvajanja teoretičnega znanja, veščin in spretnosti pri opravljanju delovnih nalog v podjetju.

Pri pripravi smernic smo se povezali s Šolskim centrom Škofja Loka, Srednjo šolo za strojništvo in delodajalci, ki s šolo sodelujejo pri izvajanju vajeniške oblike izobraževanja. Skupaj z organizatorjem praktičnega usposabljanja z delom (organizator PUD) smo obiskali izbrane delodajalce in po vnaprej pripravljenem protokolu zapisali primere izvajanja delovnih nalog v podjetjih. Obiskali smo podjetja, ki so si različna tako po velikosti (številu zaposlenih) kot po specializiranosti znotraj področja strojništva. Na podlagi teh pogovorov smo opredelili enotno strukturo za zapise delovnih nalog na drugih strokovnih področjih, npr. lesarstvo, mehatronika, elektrotehnika, kjer nadaljujemo zbiranje opisov delovnih nalog. Zbiranje zapisov poteka tako, da učitelj strokovnega modula in/ali organizator PUD skupaj z mentorjem v podjetju opredelita konkretno delovno nalogo ali opravilo vajenca ter natančno opišeta delovni postopek, tako na ravni vsebinskega poteka kot na ravni aktivnosti, ki jih pri opravilu opravita oba, mentor in vajenec.

Rezultat zbiranja zapisov bodo s*plošne didaktične smernice za mentorje in druge zaposlene v podjetjih pri izvajanju praktičnega usposabljanja.* Dodani bodo primeri iz prakse, v katerih bodo za posamezna strokovna področja konkretni opisi izvedbe delovnih nalog opremljeni z didaktičnimi priporočili. Kot rečeno bomo pri tem v ospredje postavili vidik prepletanja teorije in prakse pri izvajanju delovnih nalog v podjetju. Sodelovanje šol in podjetij je za kakovostno izvedbo poklicnega in strokovnega izobraževanja ključnega pomena. Usposobljeni mentorji so eden od pogojev, ki vodijo h kakovostni izvedbi.

Naj javnost za konec seznanimo še s tem, da smo v okviru projekta Evropskega socialnega sklada (ESS) Prenova poklicnega izobraževanja – uvajanje vajeništva pripravili tudi predlog prenovljenega osnovnega programa za usposabljanje mentorjev. Program je ciljno opredeljen in upošteva konkretne kompetence, ki jih mentor potrebuje za izvedbo praktičnega usposabljanja v podjetjih.

Tina Klarič,
Center RS za poklicno izobraževanje

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IZOBRAŽEVANJE ODRASLIH PRAZNUJE OKROGLE JUBILEJE IN PREJEMA PRIZNANJA

V letu 2019 je *Zveza ljudskih univerz Slovenije* (ZLUS) praznovala 60-letnico svojega obstoja. Prav tako smo enako obletnico od ustanovitve slavile tudi skoraj vse ljudske univerze, ki smo vanjo vključene, dve naši članici pa bosta v kratkem praznovali že okroglih 100 let – Ljudska univerza Celje v letu 2021 in Andragoški zavod Maribor leto dni kasneje. Na *Letnem posvetu o izobraževanju odraslih* v Portorožu novembra 2019 smo predstavili zbornik *Soustvarjamo družbo znanja*, o katerem so *Andragoška spoznanja* pisala v številki 1/2020.

Predsednik ZLUS mag. Bojan Hajdinjak je v svojem uvodnem nagovoru v zborniku o delovanju in spreminjajočem se izobraževanju ljudskih univerz zapisal: »*Misliti želimo sedanjost – kritično in poglobljeno, z različnimi metodami, da bi previdno in odgovorno ustvarjali prihodnost.*« Da ljudske univerze to počnemo že v tem trenutku in da delamo korake v pravo smer, dokazuje dejstvo, da je največja ljudska univerza v Sloveniji pred kratkim prejela pomembno priznanje. Javni zavod Cene Štupar – Center za izobraževanje odraslih Ljubljana je od Mestne občine Ljubljana letos prejel *nagrado glavnega mesta Ljubljana 2020*.

V obrazložitvi nagrade je zapisano, da Javni zavod Cene Štupar – Center za izobraževanje Ljubljana že 60 let vsem generacijam omogoča, da se vključujejo v številne formalne in neformalne programe. Poudarjajo, da skrbijo za vključevanje najširšega kroga ljudi v vseživljenjsko učenje, da s pomočjo strokovnjakov v spodbudnem okolju razvijajo spretnosti za kakovostno življenje in delo. Cene Štupar – CILJ v izobraževanje vključuje tudi ranljive ciljne skupine, kot so brezposelni, priseljenci, zaporniki in osebe s posebnimi potrebami. Poleg tega intenzivno sodelujejo v mednarodnih projektih in s tovrstnimi izkušnjami razvijajo nove prakse.

V *Zvezi ljudskih univerz Slovenije* nas veseli, da so v ljubljanski skupnosti opazili pomembno delo v zavodu Cene Štupar – CILJ, njihovo zavzemanje za razvoj izobraževanja odraslih in skrb za večgeneracijsko povezovanje na številnih področjih. Za nagrado jim kolegi iskreno čestitamo.

Pomembnejši kot nagrade pa so ljudje, ki se izobražujejo. Cene Štupar – CILJ ponuja veliko možnosti za izobraževanje in vsako leto razvijejo nove. To, da peljejo programe v pravo smer, potrjujejo njihovi številni zadovoljni udeleženci, ki jih je na letni ravni okoli 10.000. V njihovih novih prostorih, kamor so se preselili preteklo leto, lahko vsakodnevno

srečujemo posameznike, ki si želijo novih znanj, ki se družijo, pridejo k njim na svetovanje glede dilem in težav, s katerimi se ubadajo v vsakdanu.

Ljudske univerze so v Sloveniji zelo pomemben del izobraževalnega sistema, a pogosto njihova vloga ostane prezrta ali je potisnjena v kot. Vseskozi se prilagajamo lokalnemu okolju, v katerem delujemo in ga najbolje poznamo, in potrebam ljudi, ljudem prisluhnemo in pomagamo priti do cilja, pri tem pa ne delamo nikakršnih izjem – skrbimo tudi za skupine, ki so sicer pozabljene ali preslišane.

V *Zvezi ljudskih univerz Slovenije* se zavedamo, da postaja izobraževanje odraslih zaradi sprememb v družbi vse pomembnejše, zato skrbimo za razvoj. Z nagradami, kakršno je dobil Cene Štupar – CILJ, dobivamo nov zagon tudi vse preostale ljudske univerze po Sloveniji, ki se trudimo za udeležbo odraslih v procesu izobraževanja, prispevamo k razvoju lokalnega okolja in pomagamo vsakemu posamezniku, da skupaj z nami doseže tisto, kar si želi. V teh negotovih časih je razvoj izobraževanja odraslih, povezan z lokalnim razvojem, sila pomembno delovanje, lahko bi zapisali tudi nujno, če želimo, da se bomo kot družba razvijali v smeri, kot to od nas zahtevajo razmere/situacije, v katerih v tem trenutku živimo.

Anja Benko,
direktorica Ljudske univerze Ravne na Koroškem

O DOKTORSKI DISERTACIJI ADRIJANE BIBE REBOLJ Z NASLOVOM »PRILAGODITVE ZA ŠTUDENTE S POSEBNIMI POTREBAMI PRI DOSEGANJU ZAHTEVANIH AKADEMSKIH STANDARDOV«

Že lanskega maja je na Oddelku za pedagogiko in andragogiko Filozofske fakultete v Ljubljani doktorirala Adrijana Biba Rebolj z disertacijo, v kateri obravnava zelo aktualno problematiko prilagajanja študijskega procesa študentom s posebnimi potrebami v okviru visokošolskega izobraževanja. Gre za področje, ki skupaj z vsemi odprtimi vprašanji in dilemami še ni dovolj raziskano niti v svetu niti v slovenskem prostoru. Iz razprav o inkluziji v vzgoji in izobraževanju je pogosto izvzeto ali videno, kot da v razprave o inkluzivnosti ne sodi, saj se visokošolsko izobraževanje precej razlikuje od nižjih stopenj izobraževanja. Glede na odpiranje univerz čedalje večjemu deležu populacije in če je eden od namenov univerz tudi zmanjševanje družbenih neenakosti, pa postaja vse bolj aktualno. Disertacija si zato vsekakor zasluži posebno pozornost, saj prinaša pomemben prispevek k razumevanju problematike vključevanja študentov s posebnimi potrebami in tudi vseh drugih, ki so kakorkoli izključeni, v visokošolsko izobraževanje.

Avtorica problematiko osvetli z različnih perspektiv in jo tudi postavi v širši družbeni in zgodovinski kontekst. Glede na to smiselno strukturira teoretični uvod in se najprej loti vprašanja sobivanja raznolikih z raziskovanjem odnosa večinske družbe do oseb s posebnimi potrebami ter oblikovanja socialne identitete oseb s posebnimi potrebami. V okviru prvega poglavja tako kritično analizira različne diskurze v zvezi s posebnimi potrebami, saj so ti podlaga za paradigmatska izhodišča, v okviru katerih so se izoblikovali tudi različni modeli ukrepov za študente s posebnimi potrebami. Ne smemo pozabiti, da ti diskurzi odsevajo odnos, ki ga imamo v določeni družbi do oseb s posebnimi potrebami, in so tudi temelj za oblikovanje tega odnosa. Ta odnos do drugačnih, nezmožnih pa se je oblikoval skozi različna zgodovinska obdobja in se ukoreninil v naš t. i. kolektivni spomin, ki vpliva na naše vsakdanje ravnanje. Odnos večinske družbe do oseb s posebnimi potrebami je bil najpogosteje zaznamovan s strahom in izogibanjem, pa tudi pomilovanjem in pokroviteljstvom, ustvarjanjem nevidnosti in zmanjševanjem pomena hendikepa. V drugi polovici 20. stoletja se je pojavila ideja integracije in nato v zadnjih desetletjih ideja inkluzije, pri čemer avtorica jasno razmejuje med tema konceptoma in utemeljuje pomen uveljavljanja koncepta inkluzije – vključevanja študentov s posebnimi potrebami v okolje, ki se je pripravljeno prilagoditi posameznikovim posebnostim in potrebam.

Avtorica nato obravnava ključne teoretične koncepte, ki so relevantni za iskanje odgovorov na vprašanje, kako naj razumemo idejo inkluzije na univerzi in kako naj študentom s posebnimi potrebami zagotovimo kakovosten študij. V zvezi s tem smiselno postavlja v ospredje pomen zahteve po opolnomočenju posameznikov, premik fokusa od posameznika in njegovega primanjkljaja k interakciji med njim in okoljem ter integrativni model pravičnosti, imenovan 4R. Poglavje zaključi s predlogom salutogene paradigme, za katero so značilni sistemski pristop in v rešitve usmerjeno razmišljanje (Bateson, 1972), zagotavljanje največjega možnega blagostanja posameznika (Seligman in Csikszentmihlyi, 2014) ter koncept opolnomočenja. Pomemben je poudarek avtorice, da je pri iskanju poti za zagotavljanje kakovostne vzgoje in izobraževanja pomembno, da strokovnjaki različnih disciplin skupaj razmišljajo tudi o stičnih točkah in ne le o tem, kar jih razdvaja.

Sledi prikaz spreminjanja vloge univerze in študentske populacije ter v okviru tega konteksta prikaz obstoječega koncepta prilagoditev študijskega procesa, ki ga osvetljuje tako z vidika študentov kot pedagoških delavcev in ohranjanja akademskih standardov. Avtorica teoretični del sklene z oblikovanjem smernic za kakovosten študij študentov s posebnimi potrebami, kar je tudi najbolj izviren del teoretične raziskave. Opredeli jih s perspektivo kompetentnega študenta, ki prevzame odgovornost za svoje življenje in študij, z zagotavljanjem kakovostnega visokošolskega izobraževanja, načrtovanjem prilagoditev na način, da so namenjene vsem in vodijo k doseganju akademskih standardov. Poudarja, da se moramo zavedati, da je prizadevanje za doseganje inkluzivne prakse nikoli dokončan proces, da zahteva stalno preizpraševanje obstoječih politik in praks, vrednot in stališč.

V empiričnem delu raziskave avtorica odgovarja na štiri sklope raziskovalnih vprašanj:
1. Kakšna so stališča in znanje pedagoških delavcev o prilagoditvah za študente s posebnimi potrebami ter kakšna je njihova pripravljenost za zagotavljanje prilagoditev?
2. Kako poteka proces načrtovanja in zagotavljanja prilagoditev študijskega procesa?
3. Kako pedagoški delavci in študenti s posebnimi potrebami razumejo koncept smiselnih prilagoditev študijskega procesa?
4. Ali prilagoditve lahko ogrožajo akademske standarde?

Pri odgovarjanju na zastavljena vprašanja se je avtorica smiselno odločila za uporabo multiple študije primera, v kateri je kombinirala tako kvantitativne kot kvalitativne raziskovalne postopke. Za sodelovanje v raziskavi je namensko izbrala dve izmed fakultet Univerze v Ljubljani – ene z družboslovno-humanističnega področja in druge z naravoslovno-tehničnega področja – na katerih je bilo evidentirano večje število študentov s posebnimi potrebami. Avtorica je za potrebe pridobitve vpogleda v stališča pedagoških delavcev na obeh izbranih članicah Univerze v Ljubljani prilagodila dve lestvici stališč do študentov s posebnimi potrebami in prilagoditev zanje avtorjev Leyser, Greenberger, Sharoni in Vogel (2011) ter Upton in Harper (2002), ki jima je glede na raziskovalna vprašanja svoje raziskave dodala še vprašanja glede pripravljenosti zagotavljanja konkretnejših vrst prilagoditev ter vprašanja o stališčih do prilagoditev v povezavi z akademskimi standardi. Posebno odliko lahko pripišemo avtoričinemu kvalitativnemu delu raziskave, katerega namen je bil nadgraditi ugotovitve kvantitativnega dela raziskave o stališčih

pedagoških delavcev do prilagoditev za študente s posebnimi potrebami. Avtorica je na podlagi utemeljenih kriterijev vključila v raziskavo šest študentov s posebnimi potrebami in šest pedagoških delavcev ter z vsakim od njih izvedla po tri poglobljene polstrukturirane intervjuje (razen z eno predstavnico pedagoških delavcev, ki ni več sodelovala v zadnji fazi pridobivanja podatkov zaradi dolgotrajne bolezni). Intervjuji so bili izvedeni v različnih fazah izobraževalnega procesa. Prvi intervjuji so bili izvedeni na začetku študijskega leta in so bili namenjeni tako pridobivanju splošnih podatkov o udeležencih kot tudi vsebinskim vprašanjem, od postopkov uveljavljanja in načrtovanja prilagoditev do razumevanja pojma »smiselne prilagoditve« in doseganja akademskih standardov. Drugi in tretji intervju, ki je bil izveden po letu dni, pa sta bila usmerjena v raziskovanje primerov dobrih in slabih praks, v raziskovanje mikro nivoja odnosa med pedagoškim delavcem in študentom s posebnimi potrebami, pri čemer je raziskovalka izhajala iz k rešitvam usmerjenega pristopa. Raziskava torej ni bila zgolj eksplorativne, temveč tudi transformativne narave. Avtorica je smiselno izvedla tudi intervju s tutorko za študente s posebnimi potrebami in strokovno delavko, ki se ukvarja s študenti s posebnimi potrebami na eni izmed vključenih članic univerze. Avtorica je tako zbrala zelo veliko ustreznega gradiva, ki ga je v nadaljevanju tudi poglobljeno analizirala v postopku večfaznega odprtega kodiranja, temu pa je sledilo odnosno kodiranje, kar jo je pripeljelo do končne teoretične formulacije. Raziskovalka je kritično osvetlila tudi svojo vlogo pri zagotavljanju kakovosti raziskave.

Kvantitativni del raziskave je pokazal, da pedagoški delavci izražajo visoko stopnjo pripravljenosti na zagotavljanje prilagoditev za študente s posebnimi potrebami in pozitivna stališča do prilagoditev študijskega procesa, ki jih ne ocenjujejo kot nepravično prednost. Pedagoški delavci se večinoma (84,3 %) ne strinjajo s trditvijo, da prilagoditve znižujejo kakovost visokošolskega izobraževanja in akademske standarde. Večina (71,5 %) pa jih dopušča možnost, da v praksi lahko nastopijo situacije, ko prilagoditve zaradi ohranjanja akademskih standardov niso možne. Pedagoški delavci so se tudi kritično ocenili, da niso dovolj usposobljeni za presojo o tem, katere prilagoditve izvesti in kako. Rezultati kvantitativnega dela so odprli tudi nekatera vprašanja, ki jih je avtorica nato obravnavala v kvalitativnem delu raziskave. Med njimi je tudi osrednje vprašanje dispozicije o tem, ali lahko prilagoditve ogrožajo doseganje akademskih standardov, kar se povezuje z razumevanjem smiselnosti prilagoditev. Zastavlja se vprašanje, katere so tiste zmožnosti, ki so pogoj za uspešen univerzitetni študij, in kje so meje prilagajanja študijskega procesa. Avtorica izpostavlja, da je ključnega pomena, da pedagoški delavci ne odstopajo od temeljnih zahtev, da pa so pripravljeni prilagajati načine za doseganje teh zahtev, o čemer se je treba dogovarjati skupaj s posameznim študentom s posebnimi potrebami. Le v dialogu bosta študent in pedagoški delavec lahko prišla do načrtovanja in izvajanja smiselnih prilagoditev – tistih, ki študentu omogočajo učinkovitejše učenje in doseganje učnih ciljev posameznega predmeta. Prvi pogoj za ohranjanje akademskih standardov pa je pri tem identifikacija temeljnih zahtev – znanj in kompetenc, ki jih študent pri določenem predmetu in nadalje tudi v okviru določenega študijskega programa mora osvojiti. Šele, ko so te temeljne zahteve definirane, so možne razprave o alternativnih načinih doseganja teh zahtev. Tu ostaja odprto vprašanje, katere so te temeljne zahteve in ali lahko

prilagajamo manj osrednje cilje predmeta. Pomembna je avtoričina ugotovitev, da kljub načelnemu stališču, da je nižanje zahtev nedopustno, to ni redek pojav (zaradi različnih pritiskov, usmiljenja ipd.). Po drugi strani empirični podatki kažejo tudi, da nekateri študenti ostajajo brez prilagoditev, ker je pedagoške delavce strah, da gre za zlorabo statusa, ker ne znajo presoditi, ali bi bila določena prilagoditev smiselna, ker imajo pomisleke, da gre za nepravično prednost, in ker niso pripravljeni prilagajati ustaljenih načinov dela. Pri pedagoških delavcih se pojavlja tudi bojazen, da študenti pod zaslombo statusa in zahtev po prilagoditvah v resnici skrivajo in skušajo upravičiti svoje neznanje ter pravzaprav nimajo zmožnosti za določen študij. Pomembno je tudi avtoričino odstiranje druge perspektive, ko študenti s posebnimi potrebami ob pozitivnih izkušnjah navajajo tudi tiste, ko niso razumljeni, sprejeti, spoštovani in se nanje že od začetka gleda kot na manj sposobne študente.

Disertacija vsekakor prinaša pomembne uvide v problematiko zagotavljanja kakovostnega študija za študente s posebnimi potrebami in vse, ki so kakorkoli drugačni in izključeni. Ostaja pa še nekaj odprtih vprašanj in dilem, pri katerih ni enoznačnih odgovorov. Avtorica pravi, da bi morali biti na fakultetah tako pedagoški in strokovni delavci kot študenti zavezani inkluzivnim vrednotam in dosledno razvijati inkluzivno kulturo. Še zlasti je pomembna pripravljenost pedagoških delavcev za kritično refleksijo lastne prakse in iskanje ustreznih prilagoditev skupaj s študenti s posebnimi potrebami, izhajajoč iz njihovih resursov. To pa seveda prav tako zahteva odgovorne in avtonomne študente, ki uravnavajo svoj študij in si prizadevajo za doseganje kakovostnega znanja in relevantnih kompetenc.

Barbara Šteh

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Maria Slowey, Hans G. Schuetze in Tanya Zubrzycki (ur.)

INEQUALITY, INNOVATION AND REFORM IN HIGHER EDUCATION: CHALLENGES OF MIGRATION AND AGEING POPULATIONS
Springer International Publishing, 2020

Demografske spremembe so eden ključnih izzivov 21. stoletja. Pomembno vplivajo na številna družbena področja: izobraževalno, socialno, gospodarsko, pokojninsko, zdravstveno. Dotikajo se partnerskih odnosov, družine, medgeneracijskega sodelovanja, vseživljenjskega učenja in kakovostnega staranja. V knjigi *Inequality, Innovation and Reform in Higher Education: Challenges of Migration and Ageing Populations*, ki je izšla v zbirki *Lifelong Learning*, avtorji prispevkov proučujejo dva sociodemografska pojava – migracije in staranje prebivalstva.

Migracije so eden najpomembnejših globalnih pojavov, saj so premiki prebivalstva obsežnejši kot kadar koli prej v človeški zgodovini. Države se soočajo z visoko stopnjo notranjih in mednarodnih selitev, ki jih spodbujajo podnebne spremembe, vojne, nasilje, revščina, razlike v socialni stabilnosti ter razvitosti juga in severa. Poleg migracij je za razvite države najbolj značilen demografski pojav podaljševanje življenjske dobe oz. dolgoživost, ki skupaj z nižanjem rodnosti vodi v staranje prebivalstva.

Staranje prebivalstva kot tudi mednarodne migracije so že dolgo predmet proučevanja številnih raziskovalcev, vendar so ti doslej le redko proučevali povezave med tema sociodemografskima procesoma. Gre za različna družbena fenomena, ki pa se med seboj pomembno prepletata. Razvitejše države so najpogostejše ciljne destinacije za priseljence, ki se iz svoje matične države selijo bodisi prisilno bodisi prostovoljno. Zaradi staranja prebivalstva v razvitejših državah migracije pomenijo ne le humanitarni izziv, temveč strategijo ukrepanja, ki bo v zahodnih družbah dolgoročno zagotovila kvalificirane delavce in ohranjanje sedanje ravni reprodukcije prebivalstva. Posledice omenjenih sociodemografskih pojavov so tudi izobraževalne, politične, organizacijske in etične.

Namen knjige je ugotoviti, kakšno vlogo pri reševanju demografskih izzivov imata družbeno angažirano visoko šolstvo in vseživljenjsko učenje. Avtorji prispevkov proučujejo vlogo visokošolskih institucij pri podpori vseživljenjskega učenja oz. ustvarjanju okolja, v katerem je nenehno pridobivanje novih znanj in veščin družbeno zaželeno in dostopno. Iščejo odgovore na vprašanje, kakšne posledice za terciarno izobraževanje in vseživljenjsko učenje imajo spremembe vsakdanjega življenja in življenjskih potekov. Kakšna

je vloga visokega šolstva v družbi? Kakšne so posledice demografskih trendov na trgu dela? Ali lahko nekateri demografski trendi vodijo v upadanje števila študentov terciarnega izobraževanja? Kakšen vpliv bo to imelo na financiranje in upravljanje visokošolskih zavodov?

Obravnavanje kompleksnih vprašanj zahteva interdisciplinarne odgovore, zato sodelujoči znanstveniki, ki prihajajo iz 12 držav – Evrope (Nemčije, Irske, Slovenije, Švedske in Velike Britanije), Amerike (Brazilije, Kanade, Mehike in ZDA), Japonske, Avstralije in Nove Zelandije, odgovore črpajo iz različnih disciplin – politike, pedagogike, sociologije, ekonomije, tehnologije, demografije, zgodovine in prava. Poleg tega, da knjiga prinaša nove konceptualne pristope k proučevanju teh pomembnih vprašanj, vključuje tudi konkretne predloge za reforme – pregled inovativnih politik, uspešnih praks in aktivnega upravljanja migracij in starajočega se prebivalstva na različnih ravneh in v različnih okoljih. Zato knjiga, ki prispeva k večjemu razumevanju sodobnih demografskih trendov, njihove večplastnosti in medsebojnih povezav, ne bo relevantna le za študente in raziskovalce, temveč tudi za odločevalce in oblikovalce politik.

Klara Kožar Rosulnik

Christoph Meinel in Larry Leifer (ur.)

DESIGN THINKING RESEARCH: INVESTIGATING DESIGN TEAM PERFORMANCE
Springer, 2020

Monografija je izšla v zbirki *Raziskovanje snovalskega razmišljanja*. Snovalsko razmišljanje razumemo kot strategijo za oblikovanje inovativnih rezultatov v različnih okoljih, izhaja pa iz strategij in načinov dela, ki so značilni za oblikovalske dejavnosti. *Design thinking* (DT) se v slovenskem okolju pojavlja v prevodu kot snovalsko mišljenje in snovalsko razmišljanje. Drugo besedno zvezo uporabljajo v psihologiji dela in je pogostejša. Pojavlja se v raziskovalnih člankih, v razvoju prakse načrtovanja[1] in menedžmenta[2] ter v različnih delavnicah za učitelje, menedžerje, študente. O snovalskem razmišljanju v visokošolskem prostoru pišeta med drugim S. Avsec in V. Šuligoj. V slovenskem okolju je snovalsko razmišljanje torej že poznano, z novejšimi raziskavami lahko to področje še obogatimo tako pri posameznikih kot pri organizacijah.

Na univerzi Stanford v Združenih državah Amerike in Inštitutu H. Plattner v Nemčiji od leta 2008 vodijo raziskovalne programe o tem, kako poteka snovalsko razmišljanje in kako zmožnosti snovalskega razmišljanja razvijati pri študentih ter v drugih okoljih, kot so podjetja, šole, društva, lokalna okolja. Raziskovalci so v več kot 115 raziskovalnih projektih razvili spoznanja, modele, priporočila, ki jih objavljajo v knjižni zbirki *Design Thinking Research*. Osrednji namen publikacij je spodbujati inovativnost pri posamezniku ter inovativne prakse skupin, ki izboljšajo življenje ljudem, zato uporabljene strategije vedno vključujejo tudi empatijo in osredotočenost na potrebe ljudi. V omenjeni knjižni zbirki so izšle monografije z različnimi naslovi. Leta 2019 je izšla monografija *Putting Design Thinking to Work*, ki opisuje različne pristope pri snovalskem razmišljanju ob razvoju inovacij v poslovnem svetu. Leta 2015 je izšel zbornik z naslovom *Building Innovators*, leta 2016 *Making Design Thinking Foundational*, leta 2017 *Design Thinking and Interdisciplinarity* …

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1   Leta 1991 je izšlo delo *Design Thinking*, v katerem je arhitekt Rowe, ki je med prvimi uporabljal poimenovanje *design thinking*, opisal sistematično uporabo procedur problemskega mišljenja v arhitekturi in urbanizmu. Tudi Nigel Cross, ki ga navajajo med prvimi misleci snovalskega razmišljanja, je izhajal iz arhitekture in industrijskega oblikovanja.

2   O design managementu glej delo *Z designom do uspešne organizacije: Izkušnje, rezultati in priporočila iz prakse slovenskega Kompetenčnega centra za design management* iz leta 2019, kjer Matevž Čelik, direktor Muzeja za arhitekturo in oblikovanje, opisuje izkušnjo z razvojem organizacije in predstavlja »design kot proces«.

Letos je izšla monografija z naslovom *Investigating Design Team Performance*. Delo je razdeljeno na štiri večje enote. V prvi avtorji opisujejo empirično raziskovanje različnih strategij za razvoj in poučevanje snovalskega razmišljanja (uporabo virtualnih metod, performativnih metod, refleksivnih orodij), v drugem delu so zbrana besedila o učinkoviti interakciji v timu (rotacije v omrežju, timi med lokalnim in globalnim, interpretacija timskega dogajanja skozi prizmo nevroznanosti), v tretjem delu so zbrani »orodja« in tehnike, ki podpirajo snovalsko razmišljanje (sodelovalno virtualno okolje, Poirot – spletni inšpektor). Četrta enota vključuje tri poglavja, ki opisujejo uporabo snovalskega razmišljanja v praksi. Prikazani so primeri razvoja raznih orodij z uporabo strategije snovalskega razmišljanja. Orodja so uporabna v podjetjih, zdravstvu (npr. Tele-Board MED, orodje za računalniško podprto timsko delo in razvoj sodelovalnega odnosa med terapevtom/zdravnikom in uporabnikom/pacientom) in izobraževanju[3] (npr. razvoj novih orodij za izobraževanje na daljavo).

Za snovalsko razmišljanje kot strategijo je značilno prepletanje med naslednjimi elementi: (a) združevanje v heterogene (interdisciplinarne, medgeneracijske) time, (b) procesnost, (c) soočanje z nejasnimi problemi in (č) inovativni prostori. Pri uporabi metod snovalskega razmišljanja so zelo pomembni prostor in postavitve v prostoru (*spatial arrangements*), kar se pri drugih strategijah ne poudarja tako eksplicitno. Prostor naj bi bil tak, da spodbuja timsko delo, bil naj bi dovolj odprt, omogočal naj bi srečevanje in spodbujal eksperimentiranje ter transformiranje (idej, stališč, predmetov, načrtov). Predmeti, materiali v prostoru (pa naj bo to papir, 3D-tiskalnik ali rdeč kavč) so dostopni, mobilni in omogočajo misliti prototipne izdelke. Proces snovalskega razmišljanja vključuje več faz, ki pa niso linearno razporejene, temveč so prepletene, se ponavljajo, izmenjujejo, sestavljajo v krožne poti. Te faze so: razumeti, opazovati, kreativno sestaviti in opredeliti zorni kot, stališče, zamišljati si inovativne odgovore, izdelati prototipe, testirati.

Snovalsko razmišljanje je strategija, ki izhaja iz predpostavke o mnogoterih možnostih, zato so timi, ki uporabljajo snovalsko razmišljanje, večinoma del kompleksnih sistemov inovacij. Usposobljenost tima je ključni dejavnik za razvoj novih rešitev, zato se razvijajo različni programi za usposabljanje. Člani tima morajo imeti razvite veščine raziskovanja (s katerimi spoznavajo problem, analizirajo) in veščine ustvarjanja novih idej/rešitev. Oboje lahko razvijejo tudi s sodelovanjem v t. i. skupnosti snovalskega razmišljanja (*DT community*). V razpravah o interakcijah v timu je zanimiva zamisel, da se v omrežjih izmenjujejo/premešajo ljudje (ne le ideje). V podjetju se organizira sistem manjših timov, v katerih člani krožijo, kar prinaša pozitivne zunanje vplive v tim. Za izvajanje tega uporabljajo sistem Hive, ki organizira time in rotacije med timi, kot v monografiji opisujeta Salehi in Bernstein (str. 79).

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3   O snovalskem razmišljanju v izobraževanju glej v Koh, L. H. J., Chai, C. S., Wong, B. in Hong, H. Y. (2015). *Design Thinking for Education: Conceptions and Applications in Teaching and Learning*. Singapore: Springer.

Zanimivo je vprašanje, ki so si ga v svoji raziskavi postavili Dobrigkeit, Pajak, de Paula in Uflacker (str. 201), kako vpeljati snovalsko razmišljanje v vsakdanje delo. Razvili so niz instrumentov (metod snovalskega razmišljanja), ki so uporabne za novince. Orodja so bila testirana in ugotovili so, da uporaba zbirke orodij z imenom DT@IT vodi v boljšo komunikacijo v timu, spodbuja razvoj veščin za reševanje problemov, povečalo se je tudi poznavanje potreb uporabnikov. S pomočjo snovalskega razmišljanja avtorji odgovarjajo tudi na nove izzive podjetij, kako načrtovati delovne prostore, kar opisujejo v zadnjem poglavju. Podjetja namreč ugotavljajo, da je treba reorganizirati delovne prostore, da bi spodbudili dobro počutje (*well-being*) in ustvarjalnost zaposlenih.

Zanimanje za snovalsko razmišljanje je v preteklem desetletju naraslo, kar ne preseneča, saj je to strategija za soočanje z nejasnimi, kompleksnimi problemi in iskanje novih poti v fluidnem okolju, kot so problemi ob klimatskih spremembah, finančnih negotovostih, problemi ob novih boleznih. Avtorji v zborniku ugotavljajo, da strategija snovalskega razmišljanja doživlja veliko novosti, ki bodo »kritično transformirale« prakso na podlagi empiričnih raziskav, ki so najobsežnejše v ZDA in Nemčiji.

Jurij Ličen

Lea Bregar, Margerita Zagmajster, Marko Radovan

E-IZOBRAŽEVANJE ZA DIGITALNO DRUŽBO
Ljubljana, Andragoški center Slovenije, 2020

Andragoški center Slovenije je z letnico 2020 izdal znanstveno monografijo *E-izobraževanje za digitalno družbo*, ki so jo napisali dr. Lea Bregar, mag. Margerita Zagmajster in dr. Marko Radovan.

Knjiga izhaja iz priročnika *Osnove e-izobraževanja*, ki so ga isti avtorji objavili leta 2010, vendar je treba takoj omeniti, da prinaša veliko več kot le nujne posodobitve omenjenega dela. Področje e-izobraževanja se je v zadnjih desetih letih tako spremenilo in toliko novosti je v tem času dozorelo za uporabo v praksi, da bi samo dodajanje novosti in opuščanje zastarelih informacij brez temeljite prenove lahko vodilo v zelo obsežno in težko pregledno gradivo. Avtorji so se tej nevarnosti uspešno izognili. Gre za koherentno delo, ob vsem upoštevanju zgodovinskega razvoja pisano s stališča sedanjega trenutka in aktualnih potreb vseh, ki jim je namenjeno.

Kakor predhodni priročnik tako tudi nova monografija poudarja celostnost e-izobraževanja. Procese obravnava v celotnem življenjskem ciklu programa e-izobraževanja, od njihovega načrtovanja do razvoja, izvedbe in evalvacije. Pri tem ob tehnoloških močno poudarja in temeljito predstavlja tudi pedagoške in poslovnoorganizacijske vidike. Kot taka bo dobrodošlo branje za vse, ki kot direktorji ustanov tovrstno izobraževanje strateško snujejo ter skrbijo za to, da bo postavljeno smiselno in učinkovito, prav tako pa za tiste, ki ga organizirajo, izvajajo oziroma se z njim kakorkoli drugače srečujejo pri svojem poklicnem delu.

Knjiga z načinom prikaza snovi, ki ne predpostavlja specifičnega predznanja, nagovarja širok krog bralcev, daje podlage za dobro utemeljeno razumevanje vseh ključnih vidikov e-izobraževanja, hkrati pa je dovolj podrobna, da omogoča in tudi spodbuja samostojno iskanje odgovorov na bolj zapletena vprašanja prek drugih virov. Pri tem so konkretno obravnavane številne tematike, povezane z učnimi pristopi in metodami, ki jih omogočajo sodobne tehnologije in ki prihajajo v ospredje v zadnjem času. Gre za vsebine, ki jih marsikdo ne glede na izkušnje z e-izobraževanjem še ne pozna podrobneje, na primer odprto izobraževanje, umetno inteligenco, mobilno učenje, mikroučenje, igrifikacijo, simulacije v izobraževanju, navidezno in nadgrajeno resničnost.

Posebno vrednost daje monografiji izjemno bogata bibliografija. V obsežnem seznamu literature, na katero se avtorji sklicujejo v besedilu, je poleg starejših temeljnih del tudi

več kot 240 referenc z datumom po letu 2010, poleg tega pa posamezna poglavja prinašajo tudi seznam priporočenih povezav, na katerih bodo bralci dobili dodatne informacije in prek njih tudi laže sledili prihodnjemu dogajanju na področju e-izobraževanja.

Tudi po jezikovni plati je delo pripravljeno zelo skrbno, kar je na področjih, ki so močno prežeta z angleščino in kjer se redno soočamo z novimi pojmi, še prav poseben izziv. Konsistentna raba terminologije prispeva k jasnosti predstavljenega gradiva ter utrjuje, ponekod pa tudi predlaga slovensko izrazje. To se bo na tako živem področju seveda zagotovo še spreminjalo, česar se zavedajo tudi avtorji, ki v predgovoru vabijo k strokovnemu dialogu tako na vsebinskem kot tudi terminološkem področju.

Ne moremo mimo dejstva, da knjiga prihaja v času, ko se za e-izobraževanje poleg krogov, ki so se z njim ukvarjali že prej, močno zanimajo tudi številni novi. Čeprav se je že pred pandemijo koronavirusa močno nakazovalo, da se bo tudi klasično izobraževanje za zadostitev želja in potreb novih generacij moralo začeti intenzivneje prepletati z elementi e-izobraževanja, je izkušnja z zaprtjem šol to zavedanje močno razširila in pospešila. Izrecno je treba izpostaviti odločitev avtorjev in Andragoškega centra Slovenije, da so delo v digitalni obliki ponudili kot odprto dostopno gradivo še pred izidom v tiskani obliki – prek digitalne bralnice na spletni strani Andragoškega centra (https://www.acs.si/digitalna-bralnica/e-izobrazevanje-za-digitalno-druzbo/). Možno ga je bilo začeti prebirati že spomladi, kar je zagotovo marsikomu pomagalo hitro in urejeno priti do prepotrebnih informacij. Ob nezgrešljivem pristopu avtorjev, da ponudijo bralcem strokovno neoporečno, a res razumljivo in lepo berljivo delo, odločitev o odprtem dostopu dodatno priča o tem, da jih je vodila predvsem želja po dviganju ravni poznavanja e-izobraževanja v Sloveniji.

Z avtorji delim željo, da se s pomočjo obravnavane knjige primerom dobre prakse, ki jih v Sloveniji seveda že imamo, pridružijo številni novi, hkrati pa naj se širi zavedanje, da se e-izobraževanja ne moremo lotevati *ad hoc* z nekaj sodobnimi tehnološkimi prijemi, temveč je za to treba znati še marsikaj drugega. Obravnavana monografija ima zagotovo vse potrebno, da pripomore k temu, zato jo toplo priporočam v branje.

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