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Developing an integrated framework for critical reflection:

from practice, to theory, towards research

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<u>ABSTRACT</u>
FACULTY OF ARTS AND SOCIAL SCIENCES
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<u>Doctor of Philosophy</u>

Thesis title: Developing an integrated framework for critical reflection: from practice, to theory, towards research

By Janis Fook

Critical reflection is increasingly regarded as a necessary requirement of professional practice. Yet there are many differing perspectives on what it is, and how it should be taught in professional education, and it is not easy to see how they all relate. This is often confusing for students and educators. This potentially leads to poor standards of reflection, and little rigorous research or development of critical reflection.

This thesis aims to address this problem by developing an integrated understanding of critical reflection. It draws together the different perspectives on critical reflection (including reflective practice, the concept of reflexivity, postmodernism and critical perspectives), and shows how these different understandings can be integrated under the rubric of learning from experience. Although the idea of learning from experience in fact underpins early understandings of critical reflection, this thesis demonstrates how later formulations add to and develop this conception. In doing this, the thesis traces the practical and theoretical development of critical reflection into a framework which might be used as a basis for researching professional practice experience.

The thesis begins with an introduction which outlines the context of my thinking about social work knowledge, in which my thinking about critical reflection is located. The body of the thesis traces how I have developed these frameworks, from a mix of practical experience, theorizing from different perspectives, and reviews of literature, into the potential for its use as a research method.

The concluding section of the thesis returns to the original outline of social work knowledge, and shows how this integrated understanding of critical reflection is also congruent with basic principles of social work. In this sense, the development of thinking about critical reflection is also a contribution to the development of social work knowledge.

CONTENTS

iii

iv

Academic Thesis: Declaration Of Authorship

I, JANIS FOOK

declare that this thesis and the work presented in it are my own and has been generated by me as the result of my own original research.

Developing an integrated framework for critical reflection: from practice, to theory, towards research

 I confirm that:

1. This work was done wholly or mainly while in candidature for a research degree at this University;

2. Where any part of this thesis has previously been submitted for a degree or any other qualification at this University or any other institution, this has been clearly stated;

3. Where I have consulted the published work of others, this is always clearly attributed;

4. Where I have quoted from the work of others, the source is always given. With the exception of such quotations, this thesis is entirely my own work;

5. I have acknowledged all main sources of help;

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List of Publications Submitted in the Thesis

- J. Fook & F. Gardner (2007) <u>Practising Critical Reflection</u>, Open University Press, Maidenhead. Ch's 2,3,6,8.

- J. Fook, S. White and F. Gardner (2006) "Critical Reflection: A Review of Contemporary Understandings", in White, S., Fook, J. & Gardner, F. (eds) <u>Critical Reflection in Health and Social Care,</u> Open University Press, Maidenhead, pp. 3-20.

- J. Fook (2008) "Developing model(s) of critical reflection to contribute to organisational learning via case reviews in children's services: a scoping review of relevant literature" , Social Care Institute for Excellence, London.

- J. Fook (2010) Beyond Reflective Practice: Reworking the 'critical' in critical reflection. In Bradbury, H., Frost, N. , Kilminster, S., & Zukas, M. (eds) <u>Beyond Reflective Practice: New Approaches to Professional Lifelong Learning</u>, Routledge, London, pp. 37-51

- J. Fook & A. Kellehear (in press) "Using Critical Reflection to Support Health Promotion Goals in Palliative Care" , <u>Journal of Palliative Care</u>

INTRODUCTION

This thesis focuses on my work in developing an integrated theoretical framework for critical reflection. It draws on work which was primarily conducted whilst I was employed at the University of Southampton during the period late 2006 - late 2009. The published work included was all published during this period. However not all my work published on critical reflection during this period is included. I have selected pieces which most closely contribute to the topic of the thesis, which is about the development of my framework for critical reflection.

In constructing this thesis, I have chosen to write in a "first person", as befits a more reflective approach. I also include some of my relevant background professional experiences to help contextualize the academic work I undertake. In some ways such an approach also models a broader reflection which I am conducting upon my own work, for the purposes of this thesis.

In the main I am arguing that the work presented constitutes a major contribution to the development of an integrated understanding of critical reflection (which I began over 15 years ago, but have consolidated in the last three) on three main fronts: initially through extensive practice of it; then by theorizing it from several perspectives to build a more complex and integrated understanding; and lastly, with my most recent work, beginning to develop its research potential on the basis of this integrated understanding. My approach is therefore about integration in two ways: an integration of theoretical perspectives on critical reflection; and an integration of practical, theoretical and research endeavours.

I use the notion of *learning from experience* as a major rubric to integrate the many differing perspectives on critical reflection. The idea of critical reflection as learning from experience of course is not at all

new (it was principally written about by John Dewey in the 1930's and picked up by subsequent adult education authors). What my work contributes however is much more theoretical substance, as provided by concepts like reflective practice and reflexivity, and theoretical perspectives like postmodernism and critical social science. Unfortunately however these differing ideas, coming from differing theoretical traditions, do not lend themselves easily towards a more complex integrated understanding of critical reflection, as it is not immediately obvious how they relate to each other. This has meant that critical reflection has developed in diverse ways, which often do not build upon, or speak to each other. I link these differing theories under the umbrella of learning from experience. This provides what I regard as both a complex yet integrated framework from which to practice, theorise and research critical reflection.

Problems with the concept of critical reflection: why the need for an integrated framework

I have found in my work as an academic (educator and researcher) that this lack of an integrated understanding (by integrated understanding here I mean the ability to theorise critical reflection from several different perspectives and to see how they relate to each other) has been a major hindrance in developing critical reflection as a legitimate entity in the academic world. This is for three main reasons.

First, if critical reflection is only understood from one theoretical perspective, this may mean it may be understood only superficially. If it is theorized from only one perspective, the richness of understandings which can result from combining different perspectives is lacking. This may mean that the learning which results from undertaking critical reflection is also limited, or may be only minimally effective. In this sense also it remains limited as a form of learning, and as a method for making changes in thinking or behaviour. If it does not readily strike at the heart of the learner's experience, then its effectiveness will be limited.

Second, quite obviously, a restricted understanding of critical reflection has major implications for the effective and fair use of critical reflection in professional education. For one thing, students may be confused by literature which is based on different theoretical traditions, and unfairly assessed on this basis. Different theoretical frameworks do also lead to different expectations regarding the outcomes of critical reflection, and the evidence of a critical reflective ability. If complex and multiple understandings of these are not used, then some students may be unfairly disadvantaged.

Lastly, I would argue that clear and complex definitions of critical reflection need to be articulated, and ably located within the broad body of thinking about critical reflection. This is crucial in furthering the development of more sophisticated approaches to critical reflection by allowing us to research it in a rigorous way.

These problems constitute the academic context of my contribution regarding critical reflection, and are the problems which I address through my endeavour to develop an integrated understanding of critical reflection.

Structure of the thesis

I have structured the thesis in three chapters: the first, which presents an intellectual background and context to the work of the thesis; the second, which is the main body of the thesis; and a final chapter which forms the conclusion. The first chapter, entitled " Making connections: developing a distinctive social work knowledge" provides context to my work on critical reflection by describing the broader academic work and the issues I have tried to address which are significant to developing social work knowledge. The second chapter, which is the main body of the thesis, provides a narrative which traces the particular contributions of specific pieces of my work in developing an integrated concept of

critical reflection. This section outlines how my work on critical reflection started primarily with a more practical focus, and drew primarily on one or two frameworks. It follows by tracing efforts to further theorise it from several vantage points, and ends with a more integrated approach under the rubric of **learning from experience**. The section ends by detailing newer attempts to develop the research aspect of critical reflection, in particular the need to research it better.

The conclusion links my foregoing work with future directions in developing critical reflection as a research method, and restates the contribution of the thesis in terms of the initial problems which have been outlined, and in terms of building knowledge of relevance to social work.

Chapter 1.

Making connections: Developing a distinctive social work knowledge

Early academic experiences

I became aware of the need to identify the basis for distinctive social work knowledge some thirty years ago. I trained as a social worker in Australia in the mid-1970's, and have worked mostly as an academic since then. The social work academy, in Australia, was then very different. Social work was a relative novice in the university system, and the cultures of the more traditional disciplines seemed to hold sway. As a young academic, I was concerned from the beginning to articulate the distinctive social work academic contribution. I felt many senior social work academics were either apologetic about or dismissive of their social work heritage, and often appeared overly enthusiastic to identify with other professions/disciplines (eg. medicine, psychology or sociology). For me then, my intellectual endeavour has also been a political one - it is also about carving out a distinctive, valued and legitimate place for social work practice, knowledge and research in the academic world.

My intellectual history is therefore characterized by the mission to develop a distinctive social work knowledge or approach, to form the basis of the intellectual tradition of social work. This distinctive approach also needed to be theoretically rigorous. For me, this approach turns on the conception of "person-in-society" (Hamilton, 1950) (which was central to my early work in developing a theory of practice for radical casework (Fook, 1993). What was crucial about the concept of "person-in-society" for me was the focus on recognizing the influence of social context, and how individual people could not be understood

independently of it. ***Social work was therefore primarily about working with the interfaces and interactions between people and contexts.*** I thus became interested in how the many diverse facets of people and life were intertwined. I became concerned at how we might be forming inaccurate views, or practising ineffectively, by fragmenting aspects of people's lives, and/or only focusing only on particular aspects. I began to form what was then a barely articulated view, that people and phenomena needed to be understood in context and in a holistic way. This was to become a fundamental idea which has informed my later work. In retrospect, I realized that contextuality and holism were not new ideas in social work. The problem however was that although social work literature espoused the ideas of "context" and "holism", when the details of theories of practice, and practice itself was examined, there was little substance to how these ideas actually contributed to distinctive social work frameworks.

What I found in those earlier years (1980 - 1990) was that much social work literature itself was quite barren in terms of providing adequate frameworks to better understand the links between "person and society". Frameworks from other disciplines needed to be used, but unfortunately in doing so, the fundamental links between individual and society were often lost (or were not able to be conceptualized as a concrete basis for practice). For instance, I argued that this was the case in the so called "radical" social work period when structuralist notions became popular, and over-socialised views of individual people resulted. (Fook, 1993) Even worse, such macro views of society allowed little room for practice by individual social workers, often making them feel disempowered, and devaluing of much of the practice they believed they were restricted to within the confines of their current job descriptions. I therefore developed a model for the practice of radical casework, based on a theoretical framework which allowed a structural analysis to be linked to an understanding of individual experience. I included a clear model for how this understanding could be translated into practice, with several case examples to illustrate the possibilities.

Looking back at this it is possible to see how I began to form a bigger view about the areas of intellectual endeavour which needed to be linked in developing a distinctive social work approach. In broad terms, I extrapolated the concept of "person-in-society", to a wider concern with the idea of "connections" between what might be traditionally viewed as disparate areas of work.

If we are to frame these concerns in more academic ways, then my contribution to knowledge, and social work knowledge in particular, has been underpinned by the attempt to develop theoretical frameworks which make connections in three distinct areas (and their implications for the field of social work):

- Between individual and society ("person-in-society") -this includes four sub-issues:
    - What is the relationship between individual and society?
    - How does society influence individuals and vice versa– (causal relationships?)
    - How much room is there for us to move – (structure and agency debate?)
    - How can power inequalities be changed? This question of course encapsulates social justice concerns

- Between theory and practice , and

- Between research and practice

In line with my conception of social work as a discipline and profession based on a concept of the "person-in-society" I have also framed social work knowledge as needing:

o   to be holistic;

o   to incorporate complexity and multiplicity of views; and

o   to be integrative and inclusive.

My work has therefore taken shape in the following ways:

a.   Developing theoretical models for social work practice (using radical, postmodern and critical perspectives) which directly link theory with practice (eg. Fook, 1993; 2002a)

b.   Developing the concept of practice research and approaches to research which directly link research and practice (eg. Fook, 1996; 1998; 2001; 2004; 2002b & c)

c.   Studying professional practice in ways which represent the complexity of how it is experienced (eg. longitudinal study of professional expertise (Fook, Ryan & Hawkins, 2000)

d.   Using critical reflection to address the perceived gap between theory and practice (eg. Fook, 1996; Napier & Fook, 2000; White, Fook & Gardner, 2006; Fook & Gardner, 2006)

The contribution I will outline in this thesis is concerned primarily with how I have developed a framework for critical reflection which also ties in these other themes.

Chapter 2

Developing an integrated framework for critical reflection:
From learning from experience to researching experience

Introduction

In this section I pull together my contribution in the area of critical reflection on three key fronts: the practice of critical reflection; the way it is theorised; and lastly the implications of these two earlier arenas for research. As with any over-arching narrative, it is not always possible to ascribe distinctive boundaries between areas of work. In particular, since my work has largely been about connecting theory, practice and research, it is not always easy to separate out contributions to specific fronts. However I believe this is a helpful enough starting point to make sense of my overall work on critical reflection. I include some further reflections here to help in making this sense of my overall interest in critical reflection.

I was early on captivated by the excitement of practising critical reflection, as opposed to theorising or researching it. This was partly because I felt myself to be "doing social work" when helping people critically reflect. I remember saying to people that I <u>finally</u> felt I was doing social work (as if in all my years as an academic I was not!). I think this was because I actually experienced people making changes in the critical reflection process, which implies that I believed that social work was ultimately about bringing about change. Indeed I found it a very powerful tool for bringing about changes in thinking (and feeling), and I

also found it very moving to hear and understand practitioners' experiences. I felt fully engaged (as a whole person - intellectually, emotionally and practically- in my role as a social worker, through my experiences of helping practitioners to critically reflect.

I also remember telling people that I had finally found work which "brought it all together" for me. By this I meant that in working with critical reflection I could see how my particular interests and talents as a whole person could come together to allow me to make a distinctive professional and academic contribution. In fact I had come to this realization in part through my own reflections from participating in critical reflection workshops, where I always modeled the process for participants. I was able to recognize how specific aspects of my own biography (raised in a rigidly religious and non-critical environment) and my own social position (from a minority background - an Australian Chinese woman) contributed to my strong desire to plant the seeds of change within individual people's own reach. For me, empowerment was not empowerment if power could not be seized and crafted by an individual person themselves. I finally felt I could make a difference as a whole person, doing the things I cared about and thought were important. Developing critical reflection has allowed me to approach my professional work with renewed vigour and sense of purpose.

a. Practising critical reflection

i.   *Critical reflection as an essential characteristic of professional expertise.*

My work on critical reflection began in the mid 1990's. My initial interest was sparked in the course of conducting my study of professional expertise (Fook et al, 2000) in which I had come to the realisation that high levels of expertise demanded creativity and an ability to think and work outside the routine. I felt that an ability to critically reflect, to be

able to create one's own practice theory from one's own experience, was vital to developing these higher levels of expertise. I believed that critical reflection therefore needed to be taught from the very beginning of professional education, both as an ability to continue to learn from professional practice, but also as an orientation to knowledge creation, placing the practitioner squarely at the centre of responsibility for interpreting and utilizing relevant knowledge. In this way the seeds for creative work, and non-routine thinking, would be planted squarely within the practitioner. Fook et al (2000, pp. 226 - 236) outlines a variety of practical strategies for teaching critical reflection which derive from a number of different frameworks. This work represents the early beginnings of my (published) work on the practice of critical reflection in educational settings.

ii. Developing the practice of critical reflection.

I therefore was keen to begin teaching the skills of critical reflection in social work courses immediately. As mentioned earlier, I developed my model of critical reflection initially more through practice than through research or theorising. I was also quite captivated by the teaching and learning experience it offered, and I felt rather more keen to "do" it rather than read about it. I began by using the critical incident technique as developed in the expertise study, coupled with the work of Schon and reflective practice (this is demonstrated in Fook, 1996). I gradually added other theoretical perspectives such as reflexivity (see Fook, 1999a), postmodernism/deconstruction (Fook 2002) and looked at the role of emotion (Fook, 1999b) and transformation (Fook, 2004). During the period 1994 - 2001 I successively developed several different types of course programs: a masters program in social work which used critical reflection as a major part of the course; a new bachelor of social work program by distance based on a reflective approach; and a final year subject in the bachelor degree program. (Fook (2002) is a documentation of this subject, and chapter 7 of this is in fact is a model for critical reflection based on critical deconstruction and reconstruction).

iii. Combining several different theories for use in practice.

In 2002 I took up a new position at La Trobe University which involved establishing a Centre for Professional Development. The main work was providing short course training in critical reflection to a range of health and welfare professionals. I was at this stage, still concerned with developing a workable model for **practising** critical reflection across different professional groups. Given however, my interest in theory, I was driven to develop theory for **use in practice**.

I therefore refined my theoretical framework for presentation in these workshops, in order to make it accessible to professionals from a range of backgrounds. As mentioned earlier, this framework consisted of four main areas:

- Reflective practice (Schon)
- Reflexivity
- Postmodernism and deconstruction
- Critical social science perspectives

I used the main concepts of these theories to provide an analytical framework for participants, so that they could see different ways in which their own backgrounds and assumptions might contribute to the way they see the world, and their ability to act within it. Although I was aware that four areas of theorizing were most likely too many for participants to absorb, I was reluctant to leave any out, as I tended to find that most participants could find something in one of the theories which helped them connect with their own experience. I put the above four perspectives into a broader framework of "person in society", using a critical social science perspective to underpin the contextual nature of individual experience, and playing up the links between an individual person and their social environment. This framework is evident in the

preliminary definition of critical reflection which is outlined in the early chapters of the book (included here). Critical reflection is badged (in chapter 2) as "unsettling individual assumptions to bring about social changes".

*INSERT CH.S 2 & 3 from J. Fook & F. Gardner (2007)

<u>Practising Critical Reflection</u>

iv. Concerns about how to further theorise and research critical refection which arose from practising it.

My experience in working with critical reflection raised challenges about how to further theorise (and research) the experience of the process. For instance, I could see that emotion played a very powerful role in the learning, but could not see how any of the four theories helped explain this. There were also so many different things happening in the critical reflection process, that it was difficult to know which to focus on for the purposes of research, as it felt like honing in on some aspects would inadvertently leave others out, and this would not do justice to the whole experience of learning involved. In addition, it might be the dynamics of the whole experience which was the key. Even deciding which aspects to document for the purposes of research was problematic, as there needed to be a prior adequate framework to help determine this. These challenges form the basis of my quest to further develop theoretical and the research aspects of critical reflection, which I discuss in the following sections respectively.

b. Theorising critical reflection

In this section I focus on the need to theorise critical reflection in a way which helps to bring together the disparate aspects of the experience in a meaningful way, and also places an understanding of critical reflection within a broader context of thinking about learning. I begin with a review of the concept of critical reflection, especially in relation to similar concepts. This was published as a book chapter in 2006.

I then move onto a review of critical reflection in the context of the organizational learning, and the learning from experience fields. This was commissioned and published by the Social Care Institute for Excellence in 2008.

I end with a book chapter (published in 2010) and an article (accepted for publication in 2009) which develop the theme of learning from experience and provide a foundation for further research activities.

i. *Reviewing the concept of critical reflection*

This review was undertaken to provide a sound intellectual basis for further development of the concept of critical reflection, and to underpin more rigorous research efforts. It outlines a broad map of the academic terrain of which critical reflection is a part. The chapter overviews the extent and type of literature involved; the concepts of reflection, reflective practice and critical reflection; differentiates popular usages; covers common themes (levels and tools of reflection); discusses related concepts (such as transformational learning) and finally criticisms of critical reflection. The chapter ends with a call for better research of critical reflection.

Its contribution is important in that it fills a much needed gap in the literature on critical reflection. A good deal of this literature is remiss in defining critical reflection in a systematic way. Often only one definition is used, without acknowledging the diverse ways in which critical reflection can be understood. Sometimes many different terms are conflated, so it is not clear to which traditions authors are referring. This review addresses this problem, and allows readers to gain a clear sense of different usages and perspectives, so that further work may be better delineated and developed.

*INSERT ch. 1 from White, S., Fook, J. & Gardner, F. (ed) (2006) <u>Critical Reflection in Health and Social Care</u>

ii.Critical reflection in the context of organizational learning and learning from experience frameworks

There was also a need to understand critical reflection from the broader context of learning theory. This review (commissioned by the Social Care Institute for Excellence) provides an overview of two aspects of this: theories of organisational learning, and the learning from experience framework. This review was partly conducted in response to a need to develop critical reflection both for workplace learning (as part of a broader SCIE project to develop a new approach to case reviews). It was also conducted in order to enable me to rework a framework for critical reflection from its foundations, so that I could possibly design an approach which would fit with organizational learning models. The learning from experience review allowed me to focus on this latter aspect.

The commission requested a coverage of the key definitions, concepts, theories/perspectives, and debates/trends in the literature in each of the three areas: organisational learning, learning from experience, and critical reflection. Whilst some focus on health and social care was requested, it was regarded as more important to cover the basic understandings from the relevant literature more broadly. The commission also requested that the literature review conclude with drawing some connections between the three areas with a view to making some broad recommendations for future models of critical reflection. However this latter aspect was to form the basis for discussion only, rather than to develop such models in detail.

The final sections of the literature review pull together the three separate strands (organisational learning, learning from experience and critical reflection) and outline their commonalities. In summary, theories of learning from experience underpin both the organisational learning and

critical reflection fields. Critical reflection is also seen as integral (in most perspectives) to learning from experience and organisational learning.

What this review allowed me to do was begin to see how learning from experience could provide a credible theoretical framework, under which other theoretical perspectives could be integrated. This in turn would allow me to develop critical reflection in different ways for use in different settings. For instance, from an organisational point of view, it could be better developed for use in the workplace, as both an individual learning process but used in organisational learning; it could better connect informal and more formalised learning within organisations, and provide a framework for activities like staff development or supervision. Better still, it potentially provides pathways by which individual learning can be integrated with organisational learning. For instance, in a process of critical reflection, individual learning can be harnessed for organisational improvement. And on the other hand, individuals can learn how to function more creatively within an organisational context. These latter issues form one of the contemporary concerns in the critical reflection field, ie. the need to develop critical reflection for organisational use (Boud, 2010; Boud et al, 2006; Reynolds & Vince, 2004).

Developing model(s) of critical reflection to contribute to organisational learning via case reviews in children's services: a scoping review of relevant concepts and frameworks

Jan Fook

Contents

Introduction

Background

In phase II of SCIE's project 2.6, Minimising mistakes in services to children and families, we are piloting two potentially useful methods of learning from experience, including mistakes – systems analysis and critical reflection.

Whilst systems analysis is important in developing a "no-blame" focus, critical reflection may be useful for its focus on the more human-originated complexities of systems. In addition, critical reflection emerges from different disciplines (particularly learning theories) and traditions, and may introduce a more integrated perspective on how individual and social factors interact in the ways systems are enacted.

This mini-commission aims to provide a basic interdisciplinary understanding of critical reflection, in order to develop a possible model of critical reflection for use a broader systemic approach to reviews in services to children and families.

Focus and remit

Whilst critical reflection originates primarily from the educational discipline, it is also being increasingly developed for use in many different professions, ranging from management, medicine, law and teaching to health and social care. The focus in this review is on the broad theoretical frameworks which underpin the thinking in all disciplines. This will provide a basis for further development in relation to health and social care.

In particular, there are two main areas which will be reviewed in order to provide these underpinnings: the organisational learning literature and the learning from experience literature. Both these areas will be reviewed in order to locate current thinking on critical reflection in relation to them. Organisational learning was chosen as an area of focus, given the need to locate the project within the broader remit of learning (as opposed solely to reviews) and of course within organisational context. Learning from experience was also selected, as this field includes many of the basic learning theories and perspectives from which theories of critical reflection are drawn, and also relates closely to much of the thinking regarding organisational learning.

From these reviews two major areas will emerge: the possibilities of using critical reflection within an organisation, and in order to affect organisational practice (as opposed to using critical reflection purely for individual learning); and possible models of critical reflection for uses in organisational reviews. The purpose of this focus is to pave the way for critical reflection to be used as part of a suite of methods broadly aimed at systemic/organisational reviews designed for learning from practice experience in inter-agency child protection and safeguarding.

Methods

1. Review of the main learning theories/perspectives underpinning critical reflection: particularly learning from experience and organisational learning (this will cover the work of the major theorists/authors across the disciplines, and a review of trends in the literature pertaining particularly to social care). Seminal texts, published reviews and selected literature were searched.

2. Outline of the main principles needed to integrate the learning from experience and organisational learning perspectives

3. Review the different usages of the concept of critical reflection and how they relate to the above perspectives. Detailed search of the literature from 2006 to update the literature identified in 2005.

4. Outline of possible models/methods for the use of critical reflection for organisational learning and review in social care

1. Review of the main learning theories/perspectives underpinning critical reflection: including learning from experience and organisational learning

This will cover the work of the major theorists/authors across the disciplines, and a review of trends in the literature pertaining particularly to health social care.

1.1 ORGANISATIONAL LEARNING

I begin with the field of organisational learning as this constitutes a far larger body of literature than that of learning from experience. I have focused on literature which attempts to conceptualise and theorise the field, as opposed to that which reports empirical research. This is in order to focus on providing an understanding of the field and how it may contribute to a theoretical underpinning for the project. Eleven major literature databases were searched using 'organisational learning' and learning organisation' (with s and z options) from 1998 or 2002, usually combined with 'review' to limit the number of hits. From more than 1400 hits, 212 were considered. Subsequent references which were repeatedly referred to in the literature, or were cited as 'classic' or formative The review of this field will be covered under the following headings: basic definitions and overview of the field; related fields and concepts; key concepts; key debates; overview of perspectives.

1.1.1 Basic definition and overview

Organisational learning as a field of study is relatively new – it burgeoned exponentially in the 1990's (Beeby and Booth 2000); (Easterby-Smith and Lyles 2003). Although the idea that organisations could learn was foreshadowed as early as 1963 in a foundational book by Cyert and March (Easterby-Smith & Lyles, 2003, p. 9), and later in a classic work by Argyris and Schon (1978), it can be argued that it did not become more popularised until 1991 (Easterby-Smith & Lyles, p. 9). Since then the amount of literature has grown rapidly. It is difficult, because of the relative newness of the field, and the relatively large amount of literature, to identify authors whose works are already seen as seminal. However authors like Senge (1990) and Argyris and Schon (1978 & 1996) would certainly be regarded as key.

Organisational learning is often discussed hand in hand with the idea of the learning organisation. The learning organisation is a slightly more recent idea, beginning towards the end of the 1980's with works from authors like Pedler et al (1988). However it is Senge's 1990 work, "The Fifth Discipline: the Art and Practice of the Learning Organisation" (Senge 1990), which is widely regarded as both the foundational work, and also responsible for widely popularising the concept (Easterby-Smith & Lyles, 2003, p. 11).

It is important at the outset to differentiate between the two concepts. In simple terms organisational learning is said to refer to the processes by which organisations learn, whereas the learning organisation refers more to an ideal type of organisation (Örtenblad 2001); (Easterby-Smith & Lyles, 2003). There appears to be no disagreement in the literature as to this basic distinction (where the distinction is articulated). In an often-cited work, Tsang (1997) differentiates organisational learning as being a more descriptive idea, whereas the learning organisation is a more prescriptive concept. The former is more the interest domain of academics and researchers, whereas the latter is primarily the interest of practitioners. Yet clearly the two are inter-related, since presumably a study of organisational learning processes should enable the ideal learning organisation to be established. And it is not quite so easy to separate the concerns of each domain when both researchers and practitioners may have multiple agendas engaged in practical research or organisational change.

However, whilst it is sometimes difficult to separate the two, for the purposes of this review, I have focussed primarily on organisational learning. This is primarily because we are concerned more with how critical reflection may be used to increase learning in organisations, and less with the broader changes which may be desirable to transform the entire organisation (since other changes will be necessary as well to bring this about). I have however included major reviews or treatments of the literature on the learning organisation where I felt it particularly useful to extend our understanding of organisational learning. I will discuss the concept of the learning organisation in a little more detail in section 1.1.2 when discussing related fields and concepts.

In defining organisational learning, it is important to note that definitions will vary depending on time and perspective, as the concept is clearly changing and developing as we speak. In some ways the idea of organisational learning may be said to have developed in answer to the question of what is the nature of an "organisation", that it can be said to "learn". Some authors are still questioning the idea that an organisation may, in fact, learn (Örtenblad 2005). Of course an understanding of how organisations learn depends on an understanding of the nature of organisations and of learning. Interestingly, the organisational learning literature seems to focus more on the nature of learning rather than the nature of organisations. It appears that the different perspectives on theories of learning are at the heart of different perspectives on organisational learning. Many of the key debates which inform these perspectives are to do with:

      i.   the individual v. the collective nature of learning (how and whether learning is primarily individual or socially influenced);

      ii.   how individual learning becomes collective (how individual learning can be translated to organisational levels); and of course,

     iii.   the different understandings of the nature of knowledge (product or process?) that these different perspectives imply.

Other debates revolve around key factors which may be left out of mainstream conceptualisations, such as the role of emotions, identity and power. I will discuss in more detail the ongoing debates and the differing perspectives inherent in these questions in section 1.1.2.

As a starting point, the definition of organisational learning put forward by Vera & Crossan (2003), p. 123) seems to capture the complexities and differences of perspective well enough.

"Organisational learning is the process of change in individual and shared thought and action which is affected by and embedded in the institutions of the organisation. When individual and group learning becomes institutionalised, organisational learning occurs and knowledge is embedded in non-human repositories, routines, systems, structures, culture and strategy".

Embedded in this definition are the following ideas which cover the cornerstones of the concepts involved in organisational learning, and which all themselves require further elaboration and discussion. First is the idea of learning as involving change in thought and action (ie. Involving both cognitive and behavioural changes). This aspect comprises issues of the nature, extent and types of changes possible and identifiable, and perspectives on learning (and the nature of knowledge involved in this learning) differ in relation to these issues.

Second is the idea of whether the change is individual or shared, and at what point it becomes organisational. In this sense learning is thought to be organisational if it is influenced by and part of the organisation, but there are differing theories on how this happens, and the extent to which learning is collectively or individually influenced and the interrelationships between the two spheres.

Thirdly, a key issue is how any change or learning becomes part of the organisation and incorporated at a level beyond the individual or group. How changes become institutionalised as organisational is the subject of much of the literature, and elaborate theories of stages and levels of learning have been developed regarding this issue.

Lastly, the issue of what an organisation is, is a more implicit consideration in the literature. In the quoted definition, an organisation is represented by artefacts (such as routines, systems,

cultures) which result from the dynamic inter-play between individuals and groups. However actually identifying these and the exact nature of the relationships between them, is much more difficult.

Each of these three issues will be discussed in more detail in section 1.1.3.

1.1.2 Related fields and concepts

In this section I will briefly review four related concepts which are also representative of separate fields of study, but which have a bearing on the field of organisational learning. For pragmatic purposes I have had to confine this review primarily to literature which is explicitly about organisational learning, but in fact there are related fields which are concerned about similar issues, may stem from similar fundamental concerns or interests, or may use similar theoretical material. I start with the concept of the learning organisation, and will then touch on the fields of knowledge management and creation, and workplace learning.

<u>The learning organisation</u>

As noted earlier, the idea of the learning organisation is seen to be more about the ideal type of organisation, one which is able to respond rapidly to a changing environment and therefore to incorporate new learning. As Easterby-Smith and Lyles (2003) note, the learning organisation literature is often written by authors who may in many cases be management consultants, with an interest in selling a vision of a learning product, and therefore in also selling the diagnostic and evaluative tools and models to achieve it. The literature is thus characterised by an action focus with an imperative to improve learning processes in the organisation.

It is not always easy to separate and differentiate the body of learning organisation literature from that on organisational learning, as clearly there will be shared concerns, and shared theoretical foundations. And of course research on organisational learning processes will inevitably lead to conclusions about preferred ways of learning and ways of developing that learning. Work on improving learning processes will necessarily unearth further information about the learning processes themselves. However, it is generally agreed that whilst once the terms might have been used interchangeably (Ortenblad, 2001, p. 125) more recently the two bodies of literature have developed on separate, if parallel, tracks (Easterby-Smith and Araujo 1999).

The development of interest in the learning organisation may be seen to stem in part from other aspects of globalisation, such as the increased competitiveness of organisations (Fenwick, 2001). Senge (1990) is generally attributed as being a key author in the development and popularisation of the idea of the learning organisation (Yeo 2005; Fenwick, 2001). Senge defined learning organisations as:

> *"organisations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are mutual, where collective aspiration is set free, and where people are continually learning how to learn together."* (1990, p. 3)

According to Senge, in order to attain this state, there are five disciplines that need to come together (1990, pp. 6-12):

i.   systems thinking;
ii.   personal mastery (being able to clarify personal vision and focus energies to attain this);
iii.   mental modes (a type of reflexivity – "turn the mirror inwards' – (p. 9) in being able to unearth and scrutinise internal "pictures of the world" (p. 9);
iv.   building a shared vision;
v.   team building.

The fifth discipline (as named by Senge) which is the focus of the book is systems thinking, epitomised in the quote below (p. 12):

"At the heart of the learning organisation is a shift of mind – from seeing ourselves as separate from the world to connected to the world, from seeing problems as caused by someone or something 'out there' to seeing how our own actions create the problems we experience. A learning organisation is a place where people are continually discovering how they create their reality. And how they can change it."

"Systems" thinking, then , in Senge's view is primarily about individual people learning to see themselves as connected with their world, particularly "connected" in the sense of having agency, or the ability to influence their "reality". In this sense, it implies a particular type of epistemology, that recognises the influence of individuals and societies in constructing their knowledge. Systems thinking, in this sense in which Senge is using it, therefore implies a type of constructivist approach to knowledge building (constructivism will be discussed later in relation to different perspectives on learning in section 1.1.6)

Whilst the learning organisation may be regarded by some as an inspirational idea it has also been criticised (Fenwick, 2001) for: conflating individual and organisational learning; not differentiating learners and assuming they are in deficit; emphasising problem-solving and instrumental knowledge; appropriating critical reflection and assuming it is a rational process; not acknowledging difficulties with open dialogue; and for the paradox it raises about how individual workers might become empowered when in fact the learning organisation has a normalising imperative.

In this sense the ideal of the learning organisation may need to be tempered by questions regarding how it is operationalised and experienced in relation to the ideals it aims for.

Knowledge management

In some ways the concern with knowledge management flows out of the perceived economic value of the organisational knowledge which results from organisational learning. Whilst organisational learning focuses on the processes by which organisations acquire knowledge through learning, the field of knowledge management focuses on managing what is learnt (Argote 2005). This field is much more recently developed, only gaining academic legitimacy on the back of Nonaka and Tackeuchi's (1995) work on the knowledge-creating company. This work helped turn the focus on how knowledge is created in organisations: the processes involved in transforming tacit to explicit knowledge; the role of national culture in the construction of knowledge; and the way policy and operational levels of knowledge inter-relate. As a developing field, Vera & Crossan (2003, p. 124) maintain that knowledge management involves explicit control of knowledge in order to achieve a company's objectives, and implies managed learning, is prescriptive, and is often linked to information technology. They argue that the two fields should be integrated, but this to some extent may depend on the perspectives taken on organisational knowledge.

This field therefore throws into focus debates about the nature of knowledge and the nature of the processes which create it, and therefore has overlaps with literature in the professional and adult education field eg. the work of Michael Eraut, (1994)**.** (I will return to the concept of knowledge and the different perspectives on it in section 1.1.3.) The knowledge management field therefore has something to contribute to the field or organisational learning, both through its concern with the management of knowledge/information through technology, but also through its more explicit discussion of what knowledge is, how it can be created and transferred in organisational learning processes.

Workplace learning

Workplace, or work-based learning, is another parallel and overlapping field with that of organisational learning. It may be defined as that literature which focuses on processes involved in learning from work (Garavan, Morley et al. 2002), p. 61), or more specifically as *"that learning which derives its purpose from the context of employment"* and learning "in and for the workplace" (Evans and Rainbird 2002), p. 8). Presumably workplace learning may be broader than organisational learning, as it may encompass all the kinds of ways individuals learn at work, and may include learning which is to some extent transcends the specific employing organisation, such as professional learning. Learning for the workplace may include both formal and informal learning, learning for employer and employee needs, and learning which is accessed through the workplace. Topics may therefore include issues to do with initial

work based learning (such as traineeships or apprenticeships), work-based degrees, non-formal work-based opportunities or opportunities accessed through the workplace. (Evans & Rainbird, 2002) Concepts such as competence and expertise are important in this field.

One of the specific contributions of the workplace learning field is the significance it accords to informal (Garrick 1998) and socially situated learning, as it throws the focus back on the everyday ways people learn within the specific situations they find themselves. Hager (Hager 2004) in fact argues that we need a view of learning as a process, in which learners construct their learning in interaction with their environments. This view is echoed in some of the organisational learning literature and is indeed at the heart of some of the major debates about the nature of organisational learning, to which we will turn in more detail in section 1.1.5. This need to understand, theorise and perhaps harness the more informal (and perhaps unintended) ways that people learn has major overlaps with the concerns of experiential and action learning which will also be covered later in section 1.2.2.

1.1.3 Key concepts

In this section I review definitions of concepts which are key in the organisational learning literature. Basic concepts which are important are clearly notions of organisations and of learning, but these also imply related concepts of knowledge and the types of knowledge involved in learning, as well as the nature of reflection in learning, and the processes or stages of learning which are involved. How these basic concepts are defined is of course not straightforward. As the field of organisational learning develops, different perspectives are becoming more clearly differentiated, and definitions will vary according to these different perspectives. I will detail these perspectives in section 1.1.5 and in this section try to confine myself to giving a basic understanding of the concepts. Overall, it is broadly accurate to characterise the differences in perspectives as moving from more individualistic and static conceptions, to more social and fluid ones.

The organisation

As noted in section 1.1.2 earlier, there seems to be little explicit treatment of the concept of the organisation the literature. Rather it seems to be assumed that readers/authors hold a common understanding. However some literature does point out that it has been erroneously assumed that organisations are simply the sum of their individual parts (Elkjaer 2004), (hence a related assumption that organisational learning is the sum of individual learnings within the organisation). Elkjaer (2004) however uses a graphic image to describe a more social view of the organisation, ie. an entity that is more than the sum of its parts. This first view is likened to the "soup in a bowl" whereby individuals in the soup are contained in the "bowl" in order to constitute the organisation. An organisation in this sense is simply a collection of individuals. Alternatively, an organisation can be likened to a rope, in that individual strands are woven together to constitute a new type of entity which can perform a different function as a result of being woven together. In this sense an organisation is more than simply a collection of individuals, but becomes something qualitatively different.

Learning

In the organisational learning literature, the concept of learning is not always isolated from the concept of organisational learning, so that theories of learning which underpin theories of organisational learning, are not always made explicit. In addition (as we will discuss in section 1.1.6 further when discussing theories of learning) learning itself is a highly contested concept (Hager, 2004). For example note the differences between the following two definitions of learning.

"..*the ability to sense disconfirming data and act on it*" (Coghlan, 1997 quoted in Beeby & Booth, 2000, p. 83) and

"*the ability to acquire and integrate knowledge*" (Beeby & Booth, 2000, p. 75).

Learning is however probably generally assumed to refer to the acquiring of knowledge in order to bring about some kind of change in individuals/organisations, but whether that change is in knowledge or actions or both; how it is achieved (individually or in communities,

formally or informally); and in what directions (positively or negatively) may vary. Huysman (1999) characterises these issues in the following questions:

- who learns? (the individual actor?)
- how do they learn (environmental adaptation?)
- when do they learn (planned or not?)
- what results from the learning (improvement?)

A fifth dimension on which the literature varies is:
- what is learnt? (eg. Rules, procedures, assumptions, behaviour change) (Prange 1999)

Although in 1999 many of the answers to these questions were not always made explicit in the literature, since then there has been a much clearer development of differing perspectives on each of these fronts, and the detail of these will be discussed in sections 1.1.4, and 1.1.6 further on. In broad terms the literature appears to have moved from a more individual and cognitive focus on learning (ie. learning as the individual person's acquisition of new mental modes), with a focus on more static products as outcomes of learning, to a more social view of learning which includes social and emotional facets learnt in a context of mixed and complex technical and cultural processes. (Gherardi, Nicolini et al. 1998); Ortenblad, 2001; (Elkjaer 1999; Elkjaer 2003). Hager likens the shift from thinking of "learning as product" to "learning as process" (Hager 2004).

Knowledge

What constitutes knowledge is also a contested question.

"Knowledge is a slippery and elusive concept, and every discipline has its own secret realization of it. Problems of interpretation haunt every attempt to use the concept effectively, such as that even basic typologies that talk about, say, formal versus tacit knowledge (Polanyi 1967) actually can be quite meaningless in certain contexts. (Alvesson 2004), p. 386)

Different views hinge around the issues of whether knowledge is acquired or created (Calhoun and Starbuck 2003) and indeed what counts as knowledge (Barnett 2000), which is of course a social and political question. Again perspectives on these issues will vary related to broader perspectives regarding the nature of learning (which will be discussed in more detail in section 1.1.6. At a really basic level, some writers contend that it is not clear whether individual knowledge is organisational knowledge, or indeed whether and how knowledge is any different from information (Tsoukas and Vladimirov 2004).

However it is sufficient to note here some of the major categories of knowledge types often referred to in the organisational learning literature.

1. Procedural and substantive knowledge. It is usual to distinguish in the first instance between procedural and substantive (or declarative or propositional) knowledge, the latter referring to more "factual" or broadly abstract theoretical knowledge, and the former to the knowledge needed to make more substantive knowledge applicable in a particular situation (Fook, Ryan et al. 2000), p. 186; (Tsoukas 2003). Both types of knowledge are of course necessary in organisational learning, and may of course change and interact with each other. They may of course be learnt through different processes and may differ as to how tacit or explicit they are.

2. Narrative knowledge. A growing body of literature places emphasis on the importance of narrative knowledge, contrasting this with more abstract substantive knowledge. A narrative framework posits the idea that knowledge is context dependent and therefore captured in rich descriptions or narratives. Because "individuals constitute much of the knowledge creation that takes place in organisations" and they have an inherent predisposition to use narratives (Bartel and Garud 2003), p. 325, narratives may be seen as a way in which individuals create knowledge in organisations. (Bartel & Garud, 2003). In this way it might be argued that a narrative approach to knowledge provides a framework for research in organisational learning and of course ties in with some models of critical reflection (to be discussed in section 2.2 further on).

3. Tacit knowledge. The notion of tacit knowledge (Polanyi, 1967) is in some ways related given that much of the knowledge communicated through narrative may be tacit, but the concept is more widely applicable, and is a major recurring idea. For example, organisational learning may need to involve the uncovering of what is implicit especially in organisational culture so that it can be scrutinised as in Argyris & Schon's model (1978) or mined and converted to organisational knowledge capital (Nonaka and Takeuchi 1995). It is useful to revisit Polanyi's concept of tacit knowledge. Polanyi posited that in the process of becoming competent at what we do, we become unaware of how we do so. In this sense *"knowing something is …always a contextual issue and fundamentally connected to action…."* (Tsoukas 2003, p. 418 quoting Polanyi). It is difficult to disentangle tacit knowledge then from the contexts in which it was learnt and enacted. Another difficulty in "mining" tacit knowledge is that

"in the social world specialist, abstract, theoretical knowledge is necessarily refracted through the 'life-world' – the taken-for-granted assumptions by means of which human beings organise their experience, knowledge, and transactions with the world" (Tsoukas, 2003, p. 418 quoting Polanyi).

The issue of tacit knowledge then is in some ways crucial to organisational learning, given that much learning in organisations, what constitutes it, and how it is transmitted and valued is an ongoing issue in organisational learning (and is of course of direct relevance to critical reflection as we will discuss in section 2.2 further on. Whether and how it is connected to and constructed by action, and exactly how (and to what extent) it can be made explicit are topics of debate (Tsoukas, 2003).

Reflection

I have included the term reflection here because although it tends to be associated more particularly with reflective perspectives on organisational or workplace learning (eg. (Marsick 1988), it is also a concept more widely used in a generic and popular sense in the literature. Of course we will deal with the concept in far more detail in a later section when discussing the idea of critical reflection and their relationship to organisational learning.

The organisational learning literature which focuses on reflection tends to make an argument for its integral use in organisational learning eg. (Høyrup 2004); (Jarvinen and Poikela 2001). They tend to make the connections between the two using the earlier experiential learning theories of Kolb (19840 (Jarvinen & Poikela, 2001), or Dewey & Boud (Hoyrup, 2004) and of course Schon (1983). Reflection in this sense is more about the processes by which individuals think about their experience and learn about this in organisational context.

The processes, stages or levels of organisational learning

One of the recurring ideas in the literature of that of developing frameworks for the different levels of organisational learning, as part of a broader attempt to identify the relationship between individual and organisational learning.

The classic concepts are those of Argyris and Schon's (1996) single and double loop learning, and these concepts form the basis of many frameworks of organisational learning eg. (Carroll, Rudolph et al. 2003). The concepts rest on the idea of there being two models of theories in use, that is theories or assumptions which underpin professional practice. Argyris & Schon's (1978) Model one theories are characterised by defensive kinds of assumptions, which function to maintain the status quo situation and therefore maintain errors which may be inherent in this. By contrast model two theory- in -use promotes more open choice, personal responsibility and originality, freeing the way to reduce defensive organisational routines (from an interview with Chris Argyris (Starkey, Tempest et al. 2004). Single loop learning is characterised by model one type thinking, and tends to be confined to a more instrumental level and incorporates learning about errors within existing goals or structures. It is more incremental and focuses on specific routines or techniques. By contrast double loop learning, based on model two type thinking, involves the questioning and changing of more fundamental frameworks (such as theories in use, assumptions or organisational norms), and so may lead to more radical or transformational change. At a simple level, organisational learning may be seen as double loop learning, in that it addresses organisational level change (Lundberg 1995).

The concepts of single and double loop learning are clearly relevant to the idea of critical reflection, since reflection may be seen as a process for encouraging double loop learning through the unearthing of theories in use or taken-for-granted assumptions. Such a framework of course provides a cornerstone for much of Schon's work in professional learning. In relation to organisational learning however there is not a necessary connection between reflection and double loop learning, as double loop learning may be achieved in a variety of ways (and indeed not all reflection might lead to double loop learning).

One of the factors which is seen as important in organisational learning is dialogue (Beeby & Booth, 2000,p. 81). Dialogue is *"a sustained collective inquiry into the processes, assumptions, and certainties that compose everyday experience"* (Isaacs, 1993, quoted in Beeby & Booth, 2000 p. 81) which incorporates new thinking and to develop collaborative action. According to Beeby and Booth, Schein's (1993) idea of dialogue *"involves learning how to learn from one's own experiences and learning how to learn from the experience of others…"* (p. 82). We will of course return to this theme of learning from experience in section1.2.

Commonly learning is identified as taking place on a number of levels in the organisation. The literature identifies either three (individual, group/team and organisational) eg.(Crossan, Lane et al. 1999) Crossnan et al, 1999) or four (individual, team, inter-departmental group and organisational) (Beeby & Booth, 2000) levels. Knowledge is converted from individual level learning to organisational levels through a set of processes. For Nonaka and Takeuichi (1995), there are four main processes of knowledge conversion: i. socialisation – tacit - knowledge shared between individuals formally or informally; ii. Externalisation – tacit knowledge becomes explicit through codification or formalisation; iii. Combination- explicit information is spread to other levels of the organisation; and iv. Internalisation – explicit knowledge is routinised back into tacit levels at individual or team level.

Crossan et al's (1999) framework is often quoted. They posit four processes of organisational learning: intuiting, interpreting, integrating and institutionalising. Intuiting involves the recognition (pre-conscious) of patterns inherent in personal experience, and interpreting is the communication (through words or actions) of this to oneself and others. Integration refers to the process of developing shared understanding and co-ordinated action, and institutionalisation is the process of ensuring that routinised actions occur.

1.1.4 Key debates

Key debates in the literature revolve mostly around issues of how to understand and theorise the connection between individual and organisational learning (Kim 2004), and successive attempts to include new factors influencing learning. Taken from this perspective, developments in organisational learning theory and the new perspectives which have arisen may be understood as a movement from using more individual or psychologically based theories, to different types of social theories. At the same time new concepts, particularly those of identity, emotion and power (and of course different ways of understanding these) have been added for consideration in filling out our understanding of organisational learning.

The tension between more individually- oriented ways of approaching organisational learning and more socially-oriented approaches is encapsulated by Ortenblad (2001) who argues that in fact it is possible to distinguish between what he terms "old" (more individual in focus with knowledge seen as a product from outside individuals) and "new" (a collective social process of learning with knowledge seen as a process of knowing) approaches. Of course there are many different ways within these broad categories to resolve the tensions, and there has been much attempt to do so (Kim, 2004).

Huysman (1999) argues that most literature ignores an understanding of structural (as opposed to individual) aspects of the organisation. Some of the key issues in the debate are:
i. what is the unit of learning (and that this is still seen as the individual or group within the organisation, p. 63);
ii. The organisation is seen simply as the site for individual learning and not necessarily independent of the individuals within it (p. 64);
iii. And the structure/agency debate – whether systemic properties derive from individual actions or vice versa, and the degree of determinism/voluntarism involved in this (p. 65).

Various social approaches have been proposed in addressing these sorts of issues which include: systems approaches (Huysman, 1999, argues that most organisational learning theories are based on these); socio-cognitive (Akgün, Lynn et al. 2003), social constructionist approaches (eg. Huysman, 1999) situated learning and communities of practice (Wenger, 1998; Lave & Wenger (1991); Gherardi et al (1998); semantic (Corley and Gioia 2003); activity theory (Argote, 2005, Engestrom, 1997); and emancipatory/critical perspectives (Prange 1999; Örtenblad 2002; Bokeno 2003). I will discuss these in more detail in section 1.5 on perspectives in learning theory.

Whilst the move seems to be away from understanding organisational learning in individual terms only, it is worthwhile noting that some writers still draw attention to the role of individual in organisational learning. For instance Friedman (2001) reminds us that specific individuals can act as agents for organisational learning. Berson et al (2006)argue that leaders in particular can play a crucial role in organisational learning and that there need to be better links made between leadership and learning.

The role of identity in organisational learning has more recently been noted. Interestingly, the way this is understood also reflects the differences between more individual or more social perspectives. For example, Brown & Starkey (2004) note that individual identity change is critical to learning and therefore organisational identity is also important. They try to understand the making of identity from a psychodynamic perspective, arguing that individuals and organisations tend to try to protect identity, and that therefore learning can be anxiety provoking if it questions identity. Different social identities (eg. gendered, ethnic) can also explain differences in organisational learning (Child and Rodrigues 2003). In many ways the understanding of social identities and their social functions can also be crucial to organisational learning (Child & Rodrigues, 2003), and also to organisational management and control (Alvesson, 2004). The importance of identity construction in learning is further theorised through the application of the "communities of practice" idea (Lave & Wenger, 1991, and Wenger, 1998) which will be discussed further in section 1.1.6 under theories of learning.

Likewise the role of emotions in organisations, and therefore organisational learning, has become much more recently recognised and is seen by some to be at the core of learning (eg. Vince, 2001;(Gabriel and Griffiths 2002; Fineman 2003a; Fineman 2003b); Gould et al, 2004; Obholzer & Roberts, 2004). Again perspectives range from the more individual (biological, psychoanalytic, cognitive) to the more social (influence of culture, social role expectations, and language) (Fineman 2003b).

Emotions may be seen to be important in several different ways:
  i.   needing to deal with emotions in order to restore or preserve rationality (Fineman, 2003a, p. 559-6);
  ii. As a way of analysing aspects of work eg. Emotional labour (Hochschild 1979) and learning zones (as a way of differentiating between what is socially constructed as public or private zones) (Fineman, 2003a, p. 563); and
  iii. The emotions of sharing and trust are seen as crucial to knowledge sharing and learning for mutual benefit (Fineman, 2003a, p. 566). This theme is relevant in relation to the idea of psychological safety: *the perception that one's work environment is safe for interpersonal risk taking, such that others will not reject or embarrass those who make mistakes or speak up about difficult issues"* (Edmonson and Woolley 2003), p. 189).

  In addition the idea of emotional intelligence (Goleman 1997) which has been popularised recently is acknowledged, but seen as more of a way of prescribing an ideal type of worker, who is able to effectively undertake tasks because of being able to incorporate an adequate level of social skills.

Power is an issue which is raised often in critiques of organisational learning theories, as an aspect ignored in how organisational learning operates. It is also often coupled with other "missing" concepts such as emotions (eg. Vince, 2000) and also identity (Willmott 1997). Of course it is often associated with the more critical perspectives (eg. Fenwick, 2001). The main argument probably relates more to a critique of the idea of the learning organisation eg. (Owenby 2002) but is still applicable to organisational learning in that because power interests are often masked in the push to create the learning organisation, power interests are also

masked in understandings of how people learn (or don't) in organisations. Critics argue that the learning agenda is usually that of managers, and that the idea of the learning organisation can be used as an instrument of control or technology of power (Owenby, 2002) over workers. In this way it is self-deceptive and may gloss over the fact that many workers do not have a democratic experience or find meaning in their work lives (Fenwick 2001).

The work of Coopey and Burgoyne (2000) and Coopey (2004) is most quoted regarding the politics of organisational learning. The broad approach here is to theorise the concept of power so that organisational dynamics can be better understood and therefore organisational learning can be better facilitated. Coopey (2004) utilises Gidden's concept of power, as being expressed in interactions involving people getting others to comply:

"Power in this relational sense, 'concerns the capability of actors to secure outcomes where the realization of those outcomes depends on the agency of others'. Its use in interaction 'can be understood in terms of the facilities that participants bring to and mobilise as elements in the production of that interaction' (Giddens, 1979, p. 93) (Coopey, 2004, p. 528)

Such an understanding of power allows organisational learning to be understood within a framework of power mirrored in broader society. Coopey and Burgoyne (2000) argue that one of the implications of this is that there needs to be spaces created to nurture and develop learning in organisations. This resonates with the point above about the need for psychological safety for risk taking in learning, and of course has direct implications for the use and practice of critical reflection in organisational environments. This point will be developed further in section 2.4.

1.1.5 Key perspectives on organisational learning

Although most of the literature on organisational learning is relatively recent, there have been quite a few attempts to review and categorise its different perspectives. Given the newness of the literature, there are as expected, quite a plethora of different ways of doing this.

It is sometimes difficult to separate perspectives on organisational learning from perspectives on the learning organisation, and it is probably true to say of the literature that attempts such reviews, that it feels quite premature to be making clear distinctions regarding patterns (both for this review and for the literature which reviews organisational learning). Nevertheless there appear to be four main ways of categorising perspectives in organisational learning. These relate to:

   i.   the nature of learning in learning organisations;
   ii.   two broad perspectives on organisational learning (technical or social);
   iii. categorisation according to the types of learning theory which underpins it.

I will discuss the first two categories in this section, and the last category, perspectives according to learning theories, will form the basis of the following section 1.1.6).

   i.   The nature of learning in learning organisations. DiBella and Nevis (1999) categorise three different approaches to learning in learning organisations, based on different sets of assumptions. The first, the *normative* perspective is that learning can only take place under a particular set of internal conditions. These conditions represent some ideal view, are normally planned, and assumed to increase the organisation's chance of success. They place writers such as Senge (1990), Pedler, Burgoyne & Boydell (1991) and Watkins & Marsick (1993??(1992)) in this category.

         The second perspective, the *developmental*, holds that the learning organisation represents a late stage of a process of organisational development in adapting to its environment (rather than necessarily deliberately planned). They place authors such as Argyris and Schon (1978) in this category.

         The third category, the *capability* perspective, is based on an assumption that learning is innate to all organisations. There is not therefore one best way for organisations to

learn, but that it is simply useful to understand how they do. They place authors such as Wenger in this category.

ii.   Two broad perspectives. These perspectives to some extent mirror some of the earlier distinctions made between "old" and "new" approaches (Örtenblad 2002) as discussed earlier (section 1.1.2), and/or the distinctions between more individually and more socially-oriented understandings of organisations and their learning. In some ways they are earlier and perhaps less sophisticated ways of categorising the field. Easterby Smith & Araujo (1999) speak of the *technical* and *social* perspectives on organisational learning. Technical perspectives focus on the processing of information, and use of tools to promote the quality of learning. Social perspectives include a focus on how people make sense of experiences at work, and take into account the social construction of learning, the role of politics and a view of learning as a cultural artefact.

1.1.6 Key theories on learning

As stated several times earlier one of the key trends in organisational learning has been the search for more complex ways to understand the dynamics of learning in organisations and at organisational levels. This has tended to reflect a move from more individually-oriented theories to more social ones, but to categorise it solely in these terms is to vastly oversimplify. In addition it is not possible to categorise all literature in these terms as much of the organisational learning literature is not necessarily based on explicit learning theories, and in fact uses more explicit economic or social theories (de Fillippi and Ornstein 2003), p. 32). In this section I will try to flesh out the main features of different theories and perspectives on learning used in the organisational learning literature. This section then will serve as an excellent bridge into the next section on learning from experience.

The search for better ways to understand the complexity of organisational learning has branched out in several ways: there has been an attempt to develop understanding of the individual through established psychological perspectives; and an attempt to theorise the social influences on learning. There is a small extent to which they are integrated, but on the whole the literature appears to take one or other main pathway.

Psychological perspectives.

De Fillippi and Ornstein (2003) claim that there are five major psychological perspectives which underlie theories of organisational learning. These are differentiated by debates about the nature of human beings regarding:

     a.   the conscious and the unconscious
     b.   environment or heredity
     c.   whether personality is fixed or malleable
     d.   how observable or inferable interpretation is
     e.   an absolutist or relativist view of the role of the individual in society

The five main perspectives they identify are:

i   Biological – seeks to explain human behaviour in terms of physiology/anatomy; in terms of genetics (bio-chemistry or genetics of the brain) or neurophysiology (the brain and the nervous system)

ii   Learning – sees human behaviour as a result of learning. Two perspectives are behaviourism (behaviour is shaped by the observable consequences of foregoing behaviour eg. Skinner) or social learning theories (the individual does not necessarily need to experience the consequences of their own behaviour but can learn from others, and includes the importance of perception, interpretation and beliefs in learning eg. Bandura)

iiii   Cognitive – includes the importance of thinking, reasoning and memory (eg. Piaget). This aspect is relevant for work such as King & Kitchener's (1994) on cognitive development and reflective judgement as it relates to the development of critical reflective abilities.

iv   Socio-cultural – this emphasises the role of the social and cultural environment and its relationship with the individual and includes role theory, group dynamics. We will elaborate this perspective further when examining the social perspectives in more detail in section 1.1.5. This category here is conceptualised more in social psychological, rather than sociological terms.

v   Psychodynamic – focuses on unconscious intrapsychic dynamics, fixed developmental stages, symbolic reality, subjective observations, and the influence of past unresolved experience.

Since psychodynamic and psychoanalytic perspectives are mentioned explicitly by several authors, I will detail these a little more. Vince (2001)uses psychodynamic perspectives to theorise the role of emotions in organisations. He posits two aspects of psychodynamic theory which are important: first that learning and change are inevitably linked with anxiety and the second is that people are inevitably linked in a mutual process of becoming which involves rational and irrational, aspects, conscious and unconscious levels. Emotion in organisations then, is unavoidably political.

Brown and Starkey (2004) use psychodynamic theory to understand how learning may involve an anxiety-provoking identity change, so that information which threatens identity (both personal and organisational) is defended against. In this sense understanding organisational learning involves understanding how organisations protect their identities by insulating themselves *"from aspects of their internal and external environments and of those mechanisms through which organisational learning is made possible. " (*Brown & Starkey, 2004, pp. 572-3). It might be said that such a perspective involves generalising essentially intra-psychic processes to social dynamics within organisations. They discuss specific psychodynamic defenses (eg. denial, rationalisation, idealisation, fantasy, symbolisation) and more particularly important for this project, the need for critical self-reflexivity.

One of the more well-known bodies of work using a psychoanalytic perspective re organisational learning is that which comes from the Tavistock Institute (Obholzer and Roberts 1994). This book showcases the work of Tavistock consultants in working with specific organisations to address key organisational problems. The volume is an edited one, written by different authors, each detailing a specific project which uses basic psychoanalytic concepts to theorise the organisational dynamics and form a basis for working with the organisation to address perceived problems. Examples include: "the dangers of contagion" (Moylan 1994) which develops the idea of projective identification (ie. the feelings of the consultant as a symbol of the emotional dynamics in the organisation); "containing anxiety" (Mawson 1994) which examines how professionals transfer anger and guilt onto colleagues. The discussion on professional idealism, group identity and meaning (Dartington 1994) may provide a useful framework for understanding the construction of superior professional (and inter-professional) identities from a psychoanalytic view point and may also therefore have useful implications for the use of critical reflection.

Social approaches to organisational learning theory.

Differentiating social perspectives.

The main trend in social approaches to organisational learning theory has been the ongoing development of more and different ways to theorise social ways of learning. This has been complicated by the fact that there has been a need to develop a broader understanding of a framework for social learning theory vis a vis individual learning theory (Elkjaer, 2003) whilst at the same time developing more specific social theories. Elkjaer (2003) characterises individual learning theory as focusing on internal mental processes (the mind) for acquiring and processes information and knowledge, and neglecting the context in which they come to know and be who they are as members of the organisation. In this sense it is a narrow focus. By contrast, social learning theory encompasses ways of understanding which emanate from the experience of everyday life, ie. as learning through participation in social processes, which necessarily includes learning about both knowing (epistemology) and being (ontology). He argues that the dual focus is necessary in understanding organisational learning. Another issue worth noting is that most organisational learning and learning organisation theories have been

based on individual learning theory (Elkjaer, 2003, p. 39), so the work of developing social approaches needs much further development.

It is also necessary to note that in outlining different social perspectives on learning, the differing approaches are not necessarily mutually exclusive, and some are much more specific than others. The work of Elkjaer illustrates this nicely, in that earlier writings (Elkjaer, 1999) are much less developed than later writings (Elkjaer, 2003). In the 1999 article Elkjaer equates social learning with the idea of communities of practice (Wenger 1998), whereas in 2003 he has developed a broader framework which, because it potentially encompasses both epistemological and ontological aspects, potentially includes a whole range of social approaches to learning (eg. situated learning, practice-based learning, and learning as cultural process, pp. 38-9). The ontological aspect means that social learning is about identity development, that is, it is a relational activity (p. 43) involving being socialised into a sense of ones' place and who one is professionally and as a worker, an employee and member of an organisation. The epistemological element involves developing the knowledge that is commensurate with this. Thus "knowledge becomes the active process of knowing…the way to participate and act in organisations" (p. 44). Social learning theory emphasises "informality, improvisation, collective action, conversation and sensemaking, and learning is of a distributed and provisional nature" (p. 44). We see here that Eljkaer's conception of social learning theory implicitly links the approach with ideas regarding learning form experience, and thus of course with reflection and critical reflection. (More on this in sections 1.2.1 and 2.1.)

Another broad way of understanding the two differing perspectives on learning is that proposed by Hager (2004) in his critique of conceptions of learning which underpin understandings of learning at work. He argues that this is characterised by an understanding of learning as formal education, that learning is seen as a product, knowledge is commodified, and seen as the equivalent of information. In such a view, there is a failure to account for practice, that formal "front-end" education (theory preceding vocational education) is valued over implicit learning, and that lifelong learning is somehow seen as odd.

By contrast he proposes that learning be viewed as "process", a process which is holistic, incorporating the social, moral and political aspects of the contexts of learning (p. 11). In this view, when learning occurs as a process, it changes both the learner and the environment. The following 5 aspects are important:

- contextuality (the influence of cultural and social factors)
- holistic – learning involves the whole person
- learning is a normal and desirable activity
- lifelong learning is inevitable, and informal learning is part of this
- the importance of tacit knowledge.

These two perspectives, social learning theory and the idea of learning as process, articulate the broad differences between more individually or psychologically oriented approaches to learning, and those which are more socially based.

Specific social approaches

I have chosen to outline what I see as being the major perspectives referred to in the literature, recognising that some overlap, and do not necessarily refer to, or take into account, other perspectives which may be similar.

The following perspectives fall roughly into the category of social approaches.

a. socio-cultural perspectives
b. socio-cognitive (Akgun)
c. situated (Contu, Gherardi, Wenger, Lave & Wenger, Plaskoff
d. semantic (Corley & Goia; Weick
e. activity (Engestrom, Fuller & Unwin)
f. emancipatory/critical (Bokeno, Prange, Ortenblad)

a. Socio-cultural perspectives

Whilst this is one of the more broadly conceptualised social approaches, I have included it as a more specific approach as it is often used in the literature as a specific label. For example, Boreham & Morgan (2004) see the socio-cultural perspective as one in which learning is embedded in social and cultural contexts, and therefore is "best understood as a form of participation in these contexts. This implies the "simultaneous transformation of social practices and the individuals who participate in them…thus the social and individual dimensions of learning are mutually constitutive"(p. 308). From this perspective organisational learning is learning which is:

"undertaken by members of an organisation to achieve organisational purposes, takes place in teams or other small groups, is distributed widely throughout the organisation and embeds its outcomes in the organisation's system, structures and culture" (p. 308)

Organisational culture is seen as:
"a pattern of shared basic assumptions that the group learned as it solved its problems of external adaptation and internal integration, and which has worked well enough to be taught to new members as the correct way to perceive, think and feel in relation to these problems" (Boreham & Morgan 2004, p. 309 quoting Schein, 1992)

Boreham and Morgan claim that Argyris and Schon's 1996 approach is an example of a broad sociocultural approach in that they recognised that members of an organisation collaborate in organisational enquiries to discover hidden assumptions, and that change of these constitutes cultural change. Boreham and Morgan also link this type of theory with that of Vygotsky (Vygotskiĭ and Cole 1978)and Leont'ev (Leont'ev and Hall 1978), Russian sociocultural learning theorists. In brief their theory entails a view that elementary psychological functions evolve into higher order functions through sociocultural practices, using social tools such as language, cultural artefacts and social practices. This has been more recently developed by Engestrom (1987; 2001) as activity theory, which we will discuss in more detail under 'e' below.

The concept of dialogue is also important in this approach. Dialogue is the "structured exchange of messages, both verbal and non-verbal" (Boreham and Morgan 2004), p. 314. Dialogue is seen as fundamental to the process by which organisations learn, and to the adoption of relational practices to create a structure to sustain such learning. The relational practices that are needed are (p. 315):
- opening spaces for the creation of shared meaning
- reconstituting power relations
- providing cultural tools to mediate learning

 Note that these practices have much in common with the principles of critical reflection, which we will develop in section 2.2 further on.

Other exponents of a socio-cultural perspective include Popper & Lipshitz (1998). Because this article was written earlier than that of Boreham and Morgan, the perspective is less well-developed. However it is useful to note that they base their approach loosely on the work of Kolb and Argyris and Schon. This provides useful links to the learning from experience and the critical reflection literature. In addition, some of the earlier organisational learning authors such as Cook & Yanow (1993) and Weick (1995) are referred to, and may be seen as forerunners of this perspective in the organisational learning literature. For instance, Cook & Yanow's definition of learning as " the acquiring, sustaining, and challenging, through collective actions, of the meanings embedded in the organisation's artefacts" (1993, p. 384) illustrates the broad cultural perspective.

b. Socio-cognitive perspectives.

This arises out of the recognition that in understanding organisational learning, it is neither the whole organisation which learns, nor is learning merely done by disparate individuals. There is something to be gained by understanding how integrating our appreciation of individual cognition within social context. Social cognition thus:
> *investigates both conscious and unconscious human information processing, what they influence, and what they are influenced by in complex social and structural interactions"* (Arkun et al, 2003, p. 841)

It includes both interpersonal and reflective aspects of cognition and how people interpret their social environment. Akgün et al (2003) argue that social cognition as an approach transcends both a purely cognitive approach (focusing just on individual mental processes) or a purely structural approach (focusing on organisational routines or cultures), because it amalgamates different views on learning. It also helps draw together relatively fragmented components of learning and provides a better explanation of the learning process. A socio-cognitive approach adds complexity to our understanding of organisational learning because it:

1. Shows how social interactions can be mediated by cognitive processes, and
2. Highlights specific learning steps based on: social domains (prior attitudes, expectations, goals, emotions); output variables (judgements, behavioural decisions); and mental activities (perceiving, encoding, interpreting) (Akgün et al, 2003, p. 844).

A description of the ten components of social cognition in the organisational learning process illustrates the potentially fragmented aspects that are brought together. These are:

1. information acquisition;
2. information implementation;
3. information dissemination;
4. unlearning;
5. thinking (memory manipulation) ;
6. intelligence (ability to process information);
7. improvisation or autonomous behaviour (learning with actions or reflection);
8. sensemaking (giving meaning to information);
9. emotions; and
10. memory (storing information). (Akgün et al, 2003, p. 844)

c. Situated learning

This perspective originates from the work of Lave and Wenger (1991) and Wenger (1998), and is based on the idea that individuals learn within communities of practice. Fundamentally, the theory incorporates both cognitive and social elements (Gherardi, Nicolini et al. 1998), and is useful in providing a bridge between individual and more social views of learning (Plaskoff 2003).

From this perspective, learning is "situated" within everyday practices which happen within a community of practice. Learning occurs as people become members of communities in which they are acculturated. Learning is thus a "pervasive, embodied activity involving the acquisition, maintenance and transformation of knowledge through processes of social interaction" (Contu & Wilmott, 2003, p. 285). Learning happens when individuals engage in a shared enterprise involving cultural artefacts, behaviour and language. (Plaskoff, 2003, p. 163). In this sense, learning is about learning how to act as a culturally competent member of a specific community. Learning is therefore less about learning the required skills, and more about constructing the right identity (and therefore having the ability to act in ways which are recognised and valued by other members of the community). (Contu and Willmott 2003), p. 285)
Much of the knowledge needed to construct the appropriate identity will of course be tacit in nature, so this perspective is helpful in understanding the processes by which tacit knowledge is transferred, and knowledge-in-action occurs (Gherardi et al, 1998, p. 277).

Central to the theory is also the idea of learning as practice. Learning involves participation in social practices, and these social practices mirror a wider social, political and economic structure. Here the issue of power becomes important to the theory. The operation of power (as in access to resources) can either assist or impede access to membership of communities of practice. Clearly new entrants to a community must be accorded a degree of legitimacy in order to participate in learning processes, but to some extent full membership and mastery must always be denied to some in order to maintain the privilege of the few who control the community. "*Legitimate peripheral participation*" is the term for this process, the process by which new members are controlled, and existing positions of power are maintained. (Contu & Wilmott, 2003, pp. 285-6) Whilst it is argued that notions of power are relatively under-developed in situated learning theory (Contu & Wilmott, 2003), it is important to note that this may be one direction in which organisational learning theory can better develop. In addition the communities of practice idea is relevant to critical reflection, particularly for its explanatory

value regarding the transferral of tacit knowledge, and the idea of learning embedded in practice.

d. Sensemaking and semantic approaches

Sensemaking (Weick, 1995) and semantic approaches (Corley & Gioia, 2003) are related in that both focus on the making of meaning in organisations. Sensemaking literally means "making sense".....

"Active agents construct sensible, sensable events. They 'structure the unknown'. (Weick, 1995, p. 4)

It involves putting particular stimuli into frameworks or frames of reference which enables them to "comprehend, understand, explain, attribute, extrapolate and predict" (Weick, 1995, p. 4). The act of sensemaking is usually triggered by some kind of surprise or discrepancy.

"Sensemaking can be viewed as a recurring cycle comprised of a sequence of events occurring over time. The cycle begins as individuals form unconscious and conscious anticipations and assumptions, which serve as predictions about future events. Subsequently individuals experience events that may be discrepant from predictions. Discrepant events, or surprises, trigger a need for explanation, or post-diction, and, correspondingly, for a process through which interpretations of discrepancies are developed. Interpretation, or meaning, is attributed to surprises...It is crucial to note that meaning is assigned to surprise as an output of the sensemaking process, rather than arising concurrently with the perception or detection of differences" (Louis, 1980, quoted in Weick, 1995, pp. 4-5).

Sensemaking is therefore a retrospective process of assigning a meaningful framework to an unexpected or discrepant experience, presumably one for which present frameworks seem inadequate to explain. Weick (2003) argues that the strong ambiguity felt within organisational life means that it is as much about interpretation and fitting our history into an understanding of life, as it is about making decisions and coping with the environment (p. 8). He argues however that it is more than interpretation. Sensemaking is about the ways people generate what they interpret, it is more about a process of creating the frames for interpretation. It stems from a directly sensed experience. It implies more involvement of the actor (sensemaker), more reflexivity, and is also more important than mere interpretation because it is ultimately about the nature of self and the world. Weick, 1995, pp. 12-16. From a sensemaking perspective....

"Individuals are not seen as living in, and acting out their lives in relation <u>to</u> a wider reality, so much as creating and sustaining images of a wider reality, in part to rationalise what they are doing. They realise their reality by 'reading into' their situation, patterns of significant meaning." (Morgan et al, 1983, p. 24, quoted in Weick, 1995, p. 14)

Weick (1995, p. 170) summarises the seven properties of sensemaking:
1 grounded in identity construction;
2 retrospective;
3 enactive of sensible environments;
4 social;
5 ongoing;
6 focused on and by extracted cues; and
7 driven by plausibility rather than accuracy.
This is clearly relevant to the process of critical reflection and also theories of learning from experience. For instance some theories of reflection argue that it must be triggered by a discrepant experience (Dewey, 1933).

Semantic learning is a term coined by Corley & Gioia (2003) to denote learning based on meanings, and appears to be based on some of the earlier writings of Weick (1991). Meaning here refers not just to the meaning of words, but also symbols and actions. Semantic learning then

"involves changes to the intersubjective meanings underlying the labels and actions constituting the core of a collective's understanding of themselves. "(Corley & Gioia, 2003, p. 627)

34

Organisational learning thus involves not only changes in knowledge and behaviour, but also meanings which are created intersubjectively. In this sense, such a theory helps account for the more subtle and covert changes which may take place without an explicit articulation, and which may remain at the tacit level (Corley & Gioia, 2003, p. 627). From this perspective it may be that these sorts of changes are also the norm in organisations.

There is also a need to differentiate between the concepts of meaning and knowledge. Knowledge (in this sense, substantive knowledge, as discussed earlier in section 1.1.3) must have meaning attached for it to be useful, and so meaning construction involves the interpretation of knowledge. Learning therefore involves interpretations of knowledge, Semantic learning is therefore learning about the meanings underlying knowledge, and this involves a shared sense of what knowledge means, and the meanings underlying who we are as a collective. (Corely & Gioia, 2003, pp. 628-9) With this understanding, the theory of semantic learning can be used to link learning and identity.

Again there are clear links with critical reflection, in that the construction of identity, and the meanings associated with this, are often key assumptions which influence the way work roles are constructed and enacted.

e. Activity theory

I include activity theory as a separate perspective, as although it is not referred to in detail, it is referred to often enough and appears to be a theory which may grow in potential use in organisational learning. According to Boreham & Morgan (2004) activity theory is developed by Engestrom (1987, 2001) out of the work of Leont'ev (Leont'ev and Hall 1978). Leont'ev proposed that there was a higher collective dimension to psychological functions. Engestrom developed the idea of the 'activity system' to refer to a group of people whose collective activity is mediated by structures, rules and cultural artefacts. These enable people to work together, and the activity system can thus learn as a whole by sharing experiences across the boundaries imposed. *Expansive learning* can occur when there is a perceived failure of the activity system.

"Expansive learning occurs when the group constructs new working practices by reflecting collectively on the historically-determined contradictions in the activity system that led to the failure, and by expanding its collective understanding of both the object of its activity and the means of attaining it." (Boreham & Morgan, 2003, p. 310)

Activity theory on one level might be taken as a variant of a socio-cultural perspective, which includes also structural and practical aspects (Fuller and Unwin 2002).

f. Emancipatory and critical perspectives

Interestingly there has been little work done in terms of defining and using an explicit critical theory of learning in the field of organisational learning. Critical theory in this sense refers to perspectives which draw on a theory of how unequal power relations are maintained through both material and ideological operations. Nevertheless there has been some work done in critiquing organisational learning form a critical perspective (Fenwick, 2001) and trying to define what such a perspective might look like, and to make links between a critical perspective and the fundamental assumptions upon which much organisational learning theory is based (eg. Bokeno, 2003). I have included this work here again more for its potential in developing links with critical reflection.

As covered earlier n section 1.1.4, the some critiques of organisational learning note the lack of power analysis, and the implicit assumption that much of the material is written from the perspective of the manager rather than the front-line worker. There has also been some work done in playing up and introducing the concept of power in organisational learning literature eg. Wilmott 1997; Alvesson & Wilmott, 1992 & 1996; (Coopey and Burgoyne 2000); Vince, 2001; Contu & Wilmott, 2003). However more explicit critical frameworks tend to be missing, or exist more at the level of introducing a framework rather than actually using it (eg. (Carr 2000).

One article which takes a different tack is that of Bokeno, who focuses on drawing out the similarities between critical organisation studies and organisational learning. These exist more at

the level of intent and aspiration, but nevertheless commonalities can be traced. Bokeno notes several:

1 some implicit ideology critique in orientations to organisational analysis, particularly in questioning managerialist imperatives. He argues that there is some notion of emancipatory learning, especially in the centrality of critical reflection (p. 608).

2 There is a critique of the dominance of technical rationality in the work of people like Argyris and Schon & Senge (Bokeno 2003) p 614); and

3 the idea of communicative action is present in much of the literature which advocates the importance of dialogue and participatory action (p. 614).

1.1.7 Organisational learning in health and social care

Only a small amount of literature was located which directly addressed organisational learning in the health and social care field. There may well be other literature which does address the topic, but if this is not evident from the title or abstract, then it was not able to be identified. In order to be able to make a more substantial comment on the literature in this area, material which also dealt with the learning organisation in health and social care was also included. This material was located through the same search processes as for the material on organisational learning.

On the whole this body of literature tended not to constitute a major contribution to developing the concepts of organisational learning or the learning organisation more broadly, and so for the purposes of this review, has limited significance. Nevertheless it is useful to trace the trends in this literature in order to locate the directions in which the ideas need to be developed for applicability in the health and social care field, particularly how these trends might contribute to further thinking in developing critical reflection for use at organisational levels of learning. The broad trends relate to the following and will be discussed in this order:

1. Applications of concepts of organisational learning to the field
2. Arguments for the desirability of an organisational learning perspective in the field
3. Theoretical contributions
4. Links between individual and organisational levels of learning
5. Research studies which do some of the above
6. Critique

1. Applications of concepts of organisational learning in health/social care

Some literature focused on how specific ideas (most commonly the ideas of single and double loop learning, see section 1.1.3) might be applied in particular settings. For example Redmond (2004) develops how a reflective teaching model in a social work program is used to explore individual and organisational learning. Cherin et al (2001) shows how double loop learning is facilitated in a palliative care service, and argues for its importance.

2. Arguments for the desirability of an organisational learning perspective in the field

Some literature confines itself to arguing for the importance of a learning organisation perspective per se in the health or social care arena. For example, Dowd (2000) argues that learning needs to be an intrinsic part of the health care organisation. Chan (2001) argues for an integrated approach to organisational learning (one which combines cultural, interpersonal and systemic perspectives) for health care administrators. Nutley and Davies (2001), like Cherin et al (2001) support the need for double loop learning in defining organisational goals. They also conclude that there is a corresponding need to pay attention to the cultural and value systems and structures which facilitate organisational learning.

3. Theoretical contributions

As stated above, most of this literature did not attempt to make a contribution to theorising the concepts of organisational learning, or indeed the learning organisation. Indeed Taylor (2004) p. 75, says:

"The learning organisation in the public service sector is itself undertheorised and underresearched."

However there were several useful pieces which did attempt to develop theoretical frameworks for understanding organisational learning or the learning organisation in respect to particular areas of work. For instance Taylor (2004) notes four themes with regard to the learning organisation which are relevant in application to multi-professional work in the mental health arena:
- the learning organisation is responsive to change
- learning is continuous rather than a one off event
- learning is collective
- the importance of a work-life balance in learning

Similarly Shaw (2004) attempts to draw up a framework for evaluations in a learning organisation. This includes: an evaluation culture; and organisational focus; evaluation capacity building; and learning-based practice.

In a substantial article based on three in-depth case studies of community organisations, Perkins et al (2007) develop a framework for thinking about organisational learning in terms of first (incremental) and second (transformative)-order change, at individual, organisational and community levels. They also note a link between individual and organisational learning, which is a clear theme to emerge from the literature.

4. Links between individual and organisational levels of learning

Some of the literature draws attention to the problem of connecting individual and organisational learning (eg. Taylor, 2004), and attempts to shed more light on what the links might be.

For instance, Perkins et al (2007) analyse three cases of non-profit community organisations and conclude that those organisations which empower individual learning are better able to learn organisationally, and that such learning must involve a critical analysis of:

- Organisational goals/values
- Power relationships and how these are embodied in decision-making processes
- The interdependent role of stakeholders, the organisation and the community
- How to work together for transformative change

Chan (2003) surveyed 189 respondents in an Australian hospital in order to examine the relationship between individual, team and organisational learning. Interestingly he found that individual and organisational level learning was not linked, but that individual and teams levels were linked, and that team and organisational levels were linked.

An interesting study by Edmonson (1996), whilst not specifically about organisational learning, discusses learning from mistakes in organisational context. She studies the detection of error in administering drugs, and concludes that members' willingness to discuss mistakes openly Is an important factor in detecting error rates (p. 24). Therefore:

"….an important management issue this becomes the design and nurturance of work environments in which it is possible to learn from mistakes and collectively to avoid making the same ones in the future." (p. 25)

5. Some research studies

Case study design appears popular in explicating and exploring organisational learning in the health/social care field. Several studies used this method eg. (Gould 2000; Fook 2004; Perkins,

Bess et al. 2007). This perhaps reflects the nature of the field and the state of play of research in the area as well. As mentioned earlier, since it is a relatively under-researched and under-theorised area, case studies which attempt to draw out issues from in-depth experience are perhaps relevant in order to provide a basis for further, more specific studies. For example, Berta et al (2005) use an analysis of their experience in knowledge transfer in long term care, to develop a framework for organisational learning involving the adoption of innovations (such as clinical practice guidelines). They draw up a framework of 15 propositions which constitute contingencies in adopting innovations, but which also illustrate the complexity of oragnisational learning in a health care organisation.

There are also examples of other types of studies which made a useful contribution. For instance, Birleson & Brann (2006) compare service performance in one child and adolescent mental health service (which had applied Senge's learning organisation model five years previously) with another which hadn't. They found higher levels in evaluation activity, and quality, efficiency and efficacy of services in the former.

6. Critique

Only one article was found which was critical of the idea of the learning organisation (Reich 2002). Based on a study of child protection agencies in New South Wales, Australia, the paper argues that the idea of the "learning organisation" has been used to implement neo-liberal reforms, and that therefore in fact "technologies of training" can also function as technologies of power.

Overall it appears difficult to generalise about the trends in organisational learning in health and social care from this brief review of the literature. What does appear clear from this review is that there is not as yet a clear understanding of what organisational learning in health and social care settings is, and how indeed more generalised concepts might need to be modified in relation to these contexts. There is clearly a need to undertake more systematic research which tests and develops the applicability of concepts of organisational learning in health and social care settings, and which also identifies how it happens, and what makes it successful.

1.2 Learning from experience

1.2.1 Basic definition and overview

Literature was sought in books and periodicals across seven major literature databases using 'learning by experience' or 'experiential learning' from 2000 to 2007. From over 750 hits, 66 were considered. In addition, where multiple references were made to earlier "classic" works or authors, these were followed up and included.

Differentiating learning from experience and experiential learning

The phrases "learning from experience" and experiential learning" are often used interchangeably. For instance, perhaps the most famous exponent of experiential learning, David Kolb, defines it as "the process whereby knowledge is converted through the transformation of experience" (1984), p. 41. This definition does not distinguish between experiential learning that happens inside or outside a classroom. Presumably it can utilise many types of experiences (those which happen as part of everyday life, and those which might be constructed as part of a formal learning process).

Yet most writers do make a distinction between the more and less formal types of learning from experience. In some ways, learning from experience may be seen as a broader term, encompassing processes which may take place outside of formal educational programs, whereas experiential learning may refer to a particular more formalised educational approach which purposely utilises experience as a source of learning. For the purposes of this review I have focused on learning from experience more broadly, and included literature on experiential learning where relevant.

Learning from experience is something which is regarded as happening as part of everyday life, whereas experiential learning, given its association with more formalised learning contexts, carries with it a distinct political discourse (Usher 1993) and therefore is subject to different interpretations and constructions. Learning form experience in the broader sense tends to encompass theories and philosophies about how individual people make meaning of their life experiences. It is often closely associated with the idea of reflection. (We will discuss this in more detail in section 2.1further on. Dewey (1933; 1938) and Boud et al (1985; 1993) would be seen as major exponents of the idea of reflection. Experiential learning on the other hand tends to have more specific usages associated with how educators may use educational technologies to foster learning. For instance Fenwick (2000) seeks to distance the idea of experiential learning form being too closely associated with the idea of reflection. She sees experiential learning as clearly involving cognition, and the presence of an educator. And she also argues that there are many different perspectives, other than the reflective stance, which are involved in experiential learning.

Let us look more closely at learning from experience first. The central tenet is that human beings try to make meaning of experience, therefore central to the idea of learning is the idea of making meaning. This means that there are at least two major aspects of experience: the "subjective" (sensation) aspect and the "objective" (use of a framework to make meaning of the sensation). Experience in this sense is both personally experienced, and socially influenced (Usher, 1993). The idea of what constitutes experience is therefore of course integral to our understanding (this will be discussed in more detail in section 1.2.3 further on. Given that experience also involves the making of meaning of an original sensation it can be multi-faceted and complex , and of course much more indirect than we might imagine (Boud et al 1993). Boud et al (1993, pp. 6-7) posit five propositions on which learning from experience is based:

- experience is the foundation of, and stimulus for, learning
- learners actively construct their own experience
- learning is a holistic experience
- learning is socially and culturally constructed
- learning is influenced by the socio-emotional environment

They see reflection as integral to this process of learning:
"Reflection consists of those processes in which learners engage to recapture, notice and re-evaluate their experience, to work with their experiences to turn it into learning". (Boud et al, 1993, p. 9)

This central notion, that reflection is integral to the idea of learning from experience, is often illuminated using the work of Dewey, the eminent educational philosopher. Dewey was prolific, and his work has been used in various ways and to varying degrees of depth. Indeed some writers are critical of the ways in which it has (or hasn't) been used in current work (eg. Garrison, 1995). In particular, there is some criticism of Kolb's work for using Dewey in a superficial way (Miettinen 2000). Part of Dewey's thinking about learning from experience rests on the idea of reflection as arising from experiences which raise doubt or uncertainty. Most experiences however are non-reflective (habitual), so reflection arises out of the need to resolve problems raised by "out of the ordinary" experience. (Miettinen, pp. 61-2) We will discuss in more detail Dewey's notion of reflection in section 1.2.3 further on.

Elsewhere Dewey elaborates (1938) on the idea of experience, and what that entails in relation to education. He argues that the "correct" idea of experience is needed in order to develop the relationship between experience and education. Exactly what is involved in this idea of "correct" experience will be discussed in section 1.2.3 further on.

Boud and Miller (1996) identify two main traditions in learning from experience: human relations training and critical social theory. These may account for major differences in perspectives whereby some perspectives may be seen to focus only on individual learning in groups, rather than group learning as a whole. They may vaguely equate with the differences between more individually-oriented psychological perspectives and those with a more social focus. Boud and Miller argue that more of the latter is needed. We will pursue the differing perspectives in more detail in section1.2.3.

There are different ways of categorising experiential learning which are not based on differences in theoretical perspectives necessarily. One way focuses on different types of experiential learning. Criticos (1993) distinguishes three kinds: practical training; experience-based learning; and reflective experiential learning.

Another way of categorising experiential learning is based on the arenas in which it has become important. These include: the accrediting of life experience; experiential learning in the post-school curricula; experiential learning as a basis for consciousness-raising/social change; and personal development (Weil and McGill 1989). It is possible from this list to see how each arena may of course overlap, and how of course experiential learning has come to be associated with other fields like adult education and community development. We will discuss these in the next section (1.2.2).

What is interesting about both these systems of categorisation is that they are based on more practical, rather than theoretical distinctions. We will detail the different theoretical perspectives (section 1.2.3) further on.

1.2.2 Related fields and concepts

Let us take a step back now and gain an overview of the other fields and concepts to which learning from experience/experiential learning are closely related.

The whole area is a little complicated as the same group of theorists may be seen to have inspired several different offshoots of fields. For example the work of theorists like Dewey, Lewin, Piaget, Freire is used in different ways and in different combinations by different authors. The field of experiential learning itself may be seen as quite eclectic (Miettinen, 2000). Malinen (2000), in her extensive review of the theories which underpin adult experiential learning, notes five theorists: Knowles (adult education); Kolb (experiential learning); Mezirow (transformational learning); Revans (action learning) and Schon (reflection in action), which she regards as landmark contributors to our theorising of experiential learning.

These four areas: adult education; transformational learning; action learning; and reflection, are certainly major related fields. They are also used in other related fields, most notably organisational learning and management. And a relevant concept which is increasingly mentioned (not always theorised adequately) is that of the emotions.

I will discuss each of the above in turn.

Adult education
Adult education, or the andralogical approach as it is sometimes termed, is commonly attributed to Knowles (1980; 1985; 1989; Knowles, Holton et al. 1998) and is based on the notion that mature learners learn best when their learning is self-directed; tailored towards individual needs, interests and learning styles; takes place collaboratively and with a facilitative approach; and uses experiences relevant to context. Learning from experience is thus both effective and appropriate as it is potentially immediately relevant to the adult learner. Clearly the approaches of adult education and experiential learning are closely related (Jones and Hendry 1994).

Transformational learning
Transformative or transformational learning was developed by Jack Mezirow in numerous books and articles (1990; 1991; 1994; 1997; 2000). His work has also been used extensively by Marsick (1987; Marsick and Watkins 1999) in developing approaches to workplace learning, and by writers such as Cranton (1996) in professional development. Mezirow primarily uses Habermas' (1984) distinction between three types of knowledge (technical – developed through empirical analyses; practical – developed through language and interpretation; and emancipatory – developed through reflection based on critical theory) to focus on how thinking can be radically changed through reflecting on, and transforming, fundamental meanings (Mezirow, 1991).

"Transformative learning results in new or transformed meaning schemes or, when reflection focuses on premises, transformed meaning perspectives" (p. 6).

<u>Action learning</u>
Action learning was developed by Revans "as an empirical approach to the treatment of problems and opportunities offered in conditions of change" (1982), pp. 710-11**.** It is a:

 "*means of development, intellectual, emotional or physical, that requires its subject, through responsible involvement in some real, complex and stressful problem, to achieve intended change sufficient to improve his observable behaviour henceforth in the problem field* (Revans, 1982, pp. 626-7).

There is a plethora of writing on action learning. Examples of more recent authors are McGill & Beaty (1992). The approach uses small groups of colleagues who assist each other to work on, reflect on and learn from real experiences/problems. They literally learn through taking action, that is they learn to change rather than repeat old habits through the supportive reflection of colleagues. (McGill & Beaty, 1992, p. 12).

Action learning is also closely associated with the fields of action research (Dick 2004). Major exponents are Reason & Bradbury (2001) and Bradbury and Reason (2003). They define action research as:

"*a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory worldview. It seeks to reconnect action and reflection, theory and practice in participation with others, in the pursuit of practical solutions to issues of pressing concern to people. More generally it grows out of a concern for the flourishing of individual persons and their communities.*" (2001, p. 1).

<u>Reflection</u>
Since we will deal with the idea of reflection in a major way in this whole review, I include only a brief account here. Reflection, and its different permutations of reflective practice and critical reflection, are clearly integral as concepts to the whole field of learning from experience. Indeed they are intertwined. The idea of reflection may range from as simple an idea as the sorts of thinking involved in making meaning from experience (Dewey, 1933; Boud et al 1985), or it may involve more elaborate theories about the sorts of cognitive changes necessary for fundamental changes (Mezirow, 1981), or the emancipatory possibilities eg. (Brookfield 1995).

Schon's (1983) theory of reflective practice is of course only one way of understanding reflection. His approach is based loosely on the idea that there are discrepancies involved between the ways we think and the ways we act, and that much of our thinking is implicitly embedded in our actions. Reflection (on basic assumptions) is needed to expose these discrepancies, and so allow thinking and actions to be better aligned. This relatively simple framework forms the basis for many models for professional learning, both in the classroom and workplace, and lends itself well as a model for learning from work experiences or professional practice.

All of the above approaches have been taken up in the fields of organisational learning and management (as discussed in section 1. of the review). What complicates the field is that not all literature in these fields necessarily spells out or directly develops the specific theories of experiential learning they are using. Indeed quite often "learning from experience" is simply referred to as something which is done, and little attempt is made to connect this with systematic writing in the area or theorise it in any detail (for example some of the chapters in Gould and Baldwin's 2004 edited book do not attempt to detail specific theories of experiential learning on which they are based). Schulz (2002) provides a good example of this in noting that "a primary source of learning is experience" (p. 431) without going any further into what this might involve. As mentioned earlier, the work of Marsick (1987; Marsick & Watkins 1999) stands out in the field of workplace learning for its extensive use of Mezirow's model.

1.2.3 Key concepts

It is difficult to separate the understandings of the key concepts from the theory or framework in which they are developed. For instance, in order to understand learning it is crucial first to

understand the nature of experience. And the nature of reflection on that experience is crucial to understand the nature of learning. All are intertwined so it is difficult to know how and where to start. In this section I will try to confine the review to descriptions of the basic concepts. These will then be further elaborated when I discuss the actual theories of learning under 'b' below.

a. Experience

In basic terms, all writers agree that experience is fundamental to learning. However, as mentioned earlier, the concept of experience itself is not uncontested, although it is surprising how many authors do not specifically discuss their understanding of experience. Yet it would seem that a clear understanding of experience is needed in order to develop a clear understanding of learning from experience. One of the complicating issues is that the idea of experience can embrace so many different dimensions:

"Experience embraces reflective as well as kinesthetic activity, conscious and unconscious dynamics, and all manner of interactions among subjects, texts, and contexts. Experience flows across arbitrary denominations of formal and informal education, private and public sites of learning, and compliant and resistant meaning formation." (Fenwick, 2000, pp. 244-5)

Of those who do discuss experience, most writers seem to concur, as mentioned earlier, on the basic idea that experience has dual elements. First, it is both personal and non-personal (Usher, 1993) or 'subjective" and "objective" (Kolb, 1984). In other words, experience is both individual, yet occurs in a social environment. On another level, this means that experience involves both sensation, and the meaning made of that sensation. The former may initially be felt personally or individually, but the latter occurs using frameworks which are socially conditioned. As Usher, (1993, p. 174) states "*.....experience is the site where the personal and the social intersect and intertwine and through which each gives a constantly changing meaning to the other.*"

This distinction appears crucial to developing a theory of how people learn from experience. For example Usher (1993, p. 177) states "*.....learning from experience is conditional upon counterposing experience to something that is not experience. Understanding experience requires a point outside experience, a confrontation with experience's other*".

Second, experience is both something which is passive and active (Boud et al, 1993, pp. 6-7) that is, people can both make experiences, or have experiences enacted upon them. The 'doing' element of experience is important to writers like Schon and Revans (Malinen, 2000, p. 56).

Dewey (1938) develops what sort of notion of experience is needed in order for it to be educative – not all experiences are equally educative (p. 13).

"There needs to be a coherent theory of experience in order to give direction to how to select and organise educational methods" (p. 21).

The first principle is that of continuity – the experience must be able to link past and future experiences, which implies a potential for growth, or moving forward (p. 24). Dewey also notes the "interplay of objective and internal conditions" (p. 39) which is part of experience. Therefore both continuity and interaction are integrated as part of experience and:

"*a fully integrated personality ....exists only when successive experiences are integrated with one another*" (p. 43).
"*...experiences...in order to be educative must lead out into an expanding world of subject matter...this condition is satisfied only as the educator views teaching and learning as a continuous process of reconstruction of experience*" (p. 111).

Dewey goes onto state that for education to achieve both individual and social purposes, it must be based on the actual life experience of some individual (p. 113)

Anthropological literature confirms the dual nature of experience (Throop 2003). There is a dichotomy of perspectives between experience as "narrated" or "lived". Narrated experiences tend to be given coherence (presumably by the narrator in making personal and social meaning of the experience) or remain "granular" or "fragmented" as more directly lived sets of sensations. Throop argues that such a dichotomy is too simplistic, and poses that there are also temporal and reflective elements, that is that there are often intermediate

experiences, which change over time, and which may not always be accessible to change through active reflection. Such a view has major implications for both research and learning. In research, it may be important to capture both reflective and pre-reflective experiences (Throop, 2003, p. 235. For learning, it may be important to focus on the experiences which are less easily accessible to active reflection.

Malinen (2000, p. 58) quoting Knowles, notes an additional element of experience, important in adult education, that is, the idea that for adults "their experience is who they are". Adults define who they are in terms of their unique sets of experiences. She differentiates what she terms "first order experiences" from "second order experiences". First order experiences are the "adults' unique autobiographical history" (p. 61). Second order experiences are those which seem to embody some problematic element which brings a need to re-examine the experience. In order to learn, there needs to be some interplay between first and second order experiences (p. 62). First order experiences: include past/loved experiences; are tacit/implicit; true/authentic/worthwhile for the individual; raw or limited, yet with a holistic unity. Second order experiences: suggest some doubt of first-order experiences; may generate negative feelings or confusion; has some continuity with the totality of first-order experiences (pp. 63-4). This distinction is crucial to building up a theory of learning (which we will elaborate in 'b' below. Additionally, she adds a third category of experiences, perceptual experiences, this includes the initial and immediate perceptions or sensations of an experience.

b. <u>Learning</u>
It is sometimes difficult to separate the idea of learning from the idea of reflection, and indeed for most major writers they are intertwined. Obviously, exactly how learning is defined and the exact understanding of reflection and its role in learning will depend to some extent on the theoretical perspective taken (these will be discussed in section 2.2). Having said that, let us look firstly at how learning is described and the different categories of learning which are identified. Fenwick argues that learning, in her idea of experiential learning, is a means of human cognition (2000, p. 244). Kolb identifies learning as *"the process whereby knowledge is converted through the transformation of experience"* (1984, p. 41). According to Mezirow: *"learning is defined as the social process of construing and appropriating a new or revised interpretation of the meaning of one's experience as a guide to action"* (1994, p. 222). Here we can see on a very preliminary level different ways of describing learning, as involving knowledge (Knowles) or interpretation/meaning (Mezirow).

Mezirow (1991) elaborates on his theory of learning, which he sees essentially as interpretation or meaning making. In this view the learning process involves the learner in the following phases:
- Schematise (make an association within a frame of reference)
- Appropriate (accept an interpretation as our own)
- Remember (call upon an earlier interpretation)
- Validate (establish the truth of the interpretation)
- Act upon the interpretation

Malinen (2000, p. 75) argues that what is common to most understandings is that experiential learning involves *relearning*, that is, the modification of earlier constructions. The terms used vary from re-organisation, reconstruction, re-defining, re-thinking, re-shaping, re-interpreting and re-formulating. What is renewed varies from knowledge/self-knowledge, experience, meaning and action. The process of learning is characterised as: retrospective, critical, analytic, rational, personal and internal.

On a more superficial level, learning may be categorised according to the mode of learning (emotional, imaginal, conceptual and action, Heron, cited in Postle, (1993) or the domain of learning (instrumental, dialogic and self-reflective, Mezirow, cited in Marsick, 1987, pp. 16-17). In later writings Mezirow distinguishes between instrumental and communicative learning (1996, p. 165), defining the latter as including how one makes meaning of what is communicated. He defines reflective learning and its connection with transformative learning s follows:

"Reflective learning involves assessment or reassessment of assumptions. Reflective learning becomes transformative whenever assumptions or premises are found to be distorting, inauthentic or otherwise invalid. Transformative learning results in new or transformed meaning schemes or, when reflection focuses on premises, transformed meaning perspectives.

Boud et al (1993) are an example of writers whose theory of learning from experience is integrally bound with the idea of reflection:

"Reflection consists of those processes in which learners engage to recapture, notice or re-evaluate their experience, to work with their experience to turn it into learning." (1993, p. 9) We will describe the concept of reflection in more detail in the next section, but it is important to note at this point that reflective learning is certainly seen as one of the major, if not dominant, types of learning from experience. Learning then, as a concept, is integrally linked with reflection as a concept.

Such an idea is reinforced by Malinen, whose review of five seminal authors notes that a key to adult experiential learning is the *reflection* prompted by the discrepancies between first and second-order experiences (2000, p. 68). This echoes clear messages from Dewey, as discussed earlier (section 1.2.1), that reflection (and learning) emanate from experiences which arise from doubt or uncertainty. Dewey also makes a distinction between primary and secondary experiences, and that the reflection is associated with the secondary experience, in grappling with the uncertainty raised by the secondary experience (Miettinen, 2000, p. 65). This is indeed an ongoing theme in much of the learning from experience literature. Learning is not prompted by the existence of experience per se, but by the disquiet or discomfort that some experiences entail. And reflection is the key element in response to this disquiet.

c. Reflection
The foregoing discussion has given some idea of how reflection and learning are intertwined in much of the learning from experience literature. In this section I will cover a little more detail about what is entailed in the idea of reflection itself.

Dewey's early writings about reflection have inspired much contemporary thinking. In *How We Think: A Restatement of the Relation of Reflective Thinking to the Educative Process* (1933), Dewey outlines the basis of his thought regarding reflection. First, he differentiates reflective thinking from other forms of thinking – it is more ordered, aims at conclusions and impels inquiry (pp. 4-8). Reflection is defined as the:

"..active, persistent and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and the further conclusions to which it tends.." (p. 9).

It involves both a state of doubt, and an act of inquiring to resolve the doubt (p. 12). There are five phases involved in reflective thought which is put in train in response to this doubt (p. 107):
- Suggestions (possible solutions)
- Intellectualisation of the difficulty or perplexity that has been experienced into a problem to be solved
- Use of suggestions as hypotheses to guide observation/data collection
- Mental elaboration of idea as supposition
- Testing of hypotheses by overt or imaginative action

Miettinen (2000, p. 63) also notes how Dewey's notion of reflection is linked with culture. One of the purposes of reflection is to become conscious of the layers of cultures which are woven into observations. Such cultural layers can be obstacles in present time (since they can carry prejudices or learning from past experiences). But *"once made visible and critically transformed by reflection they can turn into means of enriching thought and action"*. In Dewey's view then:

"learning…can be regarded as a relationship between culturally appropriated conceptions, ways of action and hypotheses, and empirically new ways, deviating from previous and problematic elements in practical activity". (p. 63)

In this way there is an empirical or action element, as well as a theoretical aspect, to Dewey's reflection.

Boud et al's (1985) idea of reflection is similar to Dewey's:

"…reflection in the context of learning is a generic term for those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to new understandings and appreciations" (p. 19).

They place more emphasis on the affective dimension than does Dewey. According to them the process of reflection entails three stages:

- Returning to experience
- Attending to feelings
- Re-evaluating experience
    - Association
    - Integration
    - Validation
    - Appropriation
    - Outcome and action

Clearly there are different perspectives on reflection, associated in part with different perspectives on learning. Schon's approach derives form his concern with professional learning, and the discrepancies between knowing and action. Such discrepancies can be a starting point for professional learning, using reflection. Reflection for him involves a conscious process of both reflecting at the time of action (reflection in action), and also reflecting afterwards (reflection on action). Reflection on action enables surfacing of embedded thinking (cultural assumptions or prejudices, or past learnt thinking) implicit in actions, and a reworking of present and future action in ways which may be more relevant to the current context. Schon's view is not inconsistent with either Dewey's or Boud et al's, but is perhaps more explicit in what it focuses on (ie. the assumptions implicit in actions).

Hoyrup & Elkjaer (2006) note other perspectives on reflection: the critical perspective; social relations; and the organisational perspective. The critical perspective is similar to that which will be discussed in 2.3 where critical reflection is defined. In brief it refers to more in-depth reflection, and reflection which focuses on assumptions regarding power (pp. 35-6). The social relations perspective is a more collective perspective which sees reflection as an individual activity, but also needing to happen in relation to others, in which case there is also an action dimension (pp. 36-38). By contract the organisational perspective is more collective, and the purpose of reflection is to perform organisational functions (pp. 38-40).

1.2.4 Key perspectives/theorists

Again, to complicate matters, there are various ways of categorising the different perspectives on experiential learning.

Mezirow (1996) refers to three broad paradigms which underpin learning generally:
- The objectivist
- The interpretivist
- The emancipatory

He argues that the objectivist paradigm, based on western rationalist ways of thinking, assumes that "reality" exists independently of interpretation or representation. Knoweldge in this sense is "objective". An interpretivist paradigm recognises the role of the individual in constructing their environment through cognitive frameworks. Learning, in this paradigm, becomes intertwined with understanding how cultural frameworks bound and underpin behaviour.

He proposes that an emancipatory paradigm synthesises both the objectivist and interpretivist paradigms, recognising an interplay of individual interpretation of material reality within a cultural framework.

Fenwick (2000) gives a more detailed review of the different perspectives in experiential learning, partially motivated by a desire to distinguish conceptions of experiential learning which are not necessarily integrally linked with reflection. She lists five main perspectives:
1. Reflection (constructivist)
2. Interference (psychoanalytic)
3. Participation (situated cognition)
4. Resistance (critical cultural)
5. Co-emergence (enactivist, systems)

1. Reflection

Fenwick sees the reflective/constructivist perspective as being prevalent. It casts "the individual as central actor in a drama of personal meaning making" (p. 248). By reflecting on lived experience, the learner first interprets the experience and then generalises from it to form mental structures (knowledge) which can be transferred. Fenwick classes some key writers of this perspective in experiential learning as Boud & Miller (1996), Kolb (1984), Mezirow (1990) and Schon (1993). She also notes the writings of Vygotsky (1978) and Piaget as being influential in terms of constructivist notions of learning. The central premise here is that " a learner is perceived to construct, through reflection, a personal understanding of relevant structures of meaning derived from his or her action in the world." (p. 248)

2. Interference

The interference or psychoanalytic perspective helps disrupt the certainty of knowledge and the centrality of the individual learning. In particular it introduces the concept of the unconscious, which helps explain phenomena like resistance to knowledge, the desire for mastery or closure. Learning, in this sense is "interference of conscious thought by the unconscious and the uncanny psychic conflicts that result" (p. 251, noting Britzman's view). Desires and resistances (often experienced as strong emotions such as love or hate) in fact act to attach our internal worlds with our external social worlds. Unfortunately these often occur at very subtle levels, so we need a variety of strategies to address them, and often we enter into profound conflict in doing so. This is learning. *"The general learning process is crafting the self through everyday strategies of coping with and coming to understand what is suggested in these conflicts."* (Fenwick, 2000, p. 251) *"Experiential learning is thus coming to tolerate one's own conflicting desires while recovering the selves that are repressed from our terror of full self-knowledge"* (p. 252). However, from an educational point of view, such learning may take time, and there may not be a certain outcome. Education therefore should focus on creating conditions which promote interference, interruptions, anxiety.

Exponents of the psychoanalytic approach in experiential learning in organisations are Gould et al (2004), who promote the Tavistock Group Relations Training approach (sometimes equated with the "Leicester" model (Miller 2004). This is based on both psychoanalysis and systems theory, using the work of Bion & Klein (Gould, 2004, p. 40). In his model learning from experience happens in groups, and learning about one's relatedness from "the inside out" (Stapley 2004), p. 3). The following quote illustrates the differences between the pyschoanalytic view and the reflective perspective outlined above.

"It is not that a persona makes meaning, as much as the activity of being a person is the activity of meaning-making. There is thus no feeling, no experience, no thought, no perception, independent of a meaning-making context in which it becomes a feeling, an experience, a thought, a perception, because we are the meaning –making context….it is not about the doing which a human being does; it is about the doing which a human being is".
Stapley, 2004, pp. 3-4 quoting Kegan, (1982).

This focus on being and becoming autonomous individuals means that learning from experience, from this perspective, is "a process of adaptation, a differentiation from what was our existing subjective organisation….we are 'hatched out'….over and over again". (Stapley, 2004, p. 4)

3. Participation

The participation or situative perspective is represented by writers such as Lave and Wenger (1991) and Wenger (1998). From this perspective learning is clearly part and parcel of the situation in which a learner participates. *"Knowing and learning are defined as engaging in changing processes of human activity in a particular community"* (Fenwick, 2000, p. 253). Individuals learn by participating or interacting in a community, so that knowledge is seen as "contextually situated, and is fundamentally influenced by the activity, context and culture in which it is used" (McLellan 1996), p. 6). Knowledge, because it is formed in action, may not always be conscious. "Adults do not learn from experience, they learn in it" (Fenwick, 2000, p. 254 citing Wilson, 1992).

In this perspective transfer of knowledge from one context to another is problematic, since understandings are often worked out only in interaction with specific people in specific contexts. In this sense, what is meaningful knowledge must be negotiated within context. This

also involves negotiating between the individual's desire/need for acceptance in the community, and the community's requirements on individuals for participation. Individual experiential learning, from this perspective, is part of the process of negotiating one's place in a community, and acquiring the relevant knowledge and skills associated with negotiating that space.

4. Resistance
These critical cultural perspectives see power as a core issue. This is based on a view that any systems are comprised of competing cultures, so that in order to understand human thinking, we need to be able to understand how some cultures become more dominant than others. "…when these mechanisms of cultural power are named, ways and means to resist them appear" (Fenwick, 2000, p. 257). Power of course may be a complex phenomenon, and may work in many different ways, such as through discourses, or processes of colonisation. Brookfield (2006) is a major exponent of the use of critical theory in adult and experiential education.

From a critical perspective, experiential learning involves a process of tracing the political influences of the contexts of experience. "People learn how what they may experience as personal yearnings, despair, conflict, and identity struggles are shaped partly by historical cultural dynamics and ideologies of particular communities" (Fenwick, 2000, p. 258). This process can be triggered by questioning socially accepted ways of seeing. "When we undermine their 'naturalness' and challenge the assumptions on which they're based, we can see the possibility for difference…transformation becomes urgent, difficult, possible" (Foucault cited in Kritzman, 1988, p. 154, cited by Fenwick, 2000, p. 259).

5. Co-emergence
This is a more recent perspective. Authors include Varela et al (1991) and Davis and Sumara (1997). Learning, from this perspective, is embodied, and occurs in biological, psychological and cultural context. Experiences involve bodies with sensorimotor capacities which interact with this environment. Enactivism explores how the learner and setting co-emerge in interaction. It is systemic in understanding, and includes human beings as part of this system, so that in interaction the system is constantly being changed. (Fenwick, 2000, p. 261). Understanding is therefore embedded in conduct, and the focus of enactivism is not on the separate components of experience (such as the person or experience), but on "the relationships binding them together in complex systems" (Fenwick, 2000, p. 262).

Learning in this sense is a continuous process of relating between consciousness, identity, action and interaction, and objects and structural dynamics of complex systems (Fenwick, 2000, p. 262). Learning therefore cannot be understood "except in terms of co-emergence: each participant's understandings are intertwined with the others' and individual knowledge co-emerges with collective knowledge" (Fenwick, 2000, p. 263)

2.0 Critical reflection

2.1 Overview of field and concepts- Differentiating main terms (reflection, reflective practice and critical reflection)

The literature was searched across ten major databases using 'critical reflection' *and* 'social care' or 'social work' from 2006- 2007, to update a detailed review conducted in 2005 (Fook, et al. 2006). From over 500 hits, 58 were considered. In addition, the literature of major authors already known to the author was considered and included.

In this section I have tried to review literature (from all disciplines) which claims to be focused more on the concepts of reflection, reflective practice and critical reflection, as opposed to literature on organisational learning, or learning from experience/experiential learning, as

covered in the earlier sections. Obviously however, as we have seen from the foregoing discussions, making a clear differentiation between these types of literature is not easy, and there is much overlap in the content of discussions. In addition, it may not always be useful to make clear distinctions between the types of literature, since usages and meanings overlap to a large extent. A further complicating factor is that the literature spans many different disciplines and fields, and only some is deliberately inter-disciplinary in focus. The main fields/disciplines are: management and organisational/workplace learning; education and adult education; community work/action-based learning; the professions (law, management, health (medicine, nursing, other allied health) and social care/social work. (Fook et al, 2006)

However I think it is relatively accurate to say that the literature which claims to be about reflection, reflective practice, or critical reflection does vary in the extent to which it draws on broader theoretical literature related to learning, and may in some senses be more eclectic, and less substantive or coherent theoretically than the bodies of literature on learning from experience. Like organisational learning, critical reflection tends more to have been a concept which in some ways derives from the practice of it. Its theorisation, and hence academic coherence, is something which has to be largely constructed and reconstructed from the body of literature which purports to be written on it.

For our purposes here I have chosen the three main terms – reflection, reflective practice and critical reflection to focus on, as they seem to be either associated or conflated in the literature. The concept of reflexivity is another term which is also associated, although to a slightly lesser extent. Each term arises from different bodies of literature (and disciplines) to some extent.

The concept of *reflection* has already been outlined in section 1.2.4. In basic terms, the idea of reflection seems most closely associated with learning from experience (and tends therefore to derive more from the field of adult education) and refers broadly to the intellectual (and emotional) processes by which individuals change their thinking in order to make meaning of, and thus learn from, experience (Dewey 1933, Boud et al 1985, (Boyd and Fales 1983). This may of course involve many different activities and processes, and many different changes in different types of knowledge. Reflection, therefore, can take many different forms, and be enacted in many different ways. It is important to note that although reflection involves thinking processes, not all thinking is necessarily reflection. Reflection involves thinking to make meaning of experience.

The idea of *reflective practice* is however a much more specific concept, developed particularly from the work of Argyris and Schon (1978, 1996) and later Schon (1983) from a focus on professional learning. It thus contributes to, and draws from, literature on organisational learning and the adult education field, but has more applied and specific applications. It rests more specifically on the notion of the discrepancies between professional practice as espoused and enacted, and the need to expose the tacit assumptions inherent in enacted practice in order to resolve the discrepancies. Reflective practice therefore involves the unearthing of implicit assumptions by professionals in their own work.

Critical reflection as a concept derives both from critical social science perspectives, as well as educational literature. Major exponents are Stephen Brookfield and Jack Mezirow. However, because there is an identifiable critical perspective within the organisational learning/management field, as well as a substantial interest in reflection, critical reflection is a major topic of interest in some management circles eg. (Reynolds 1998). There is therefore a body of literature which clearly draws from and contributes to both adult education and organisational learning, through an integrated interest in critical reflection and its usage in professional practice and learning in organisations eg. (Gould and Baldwin 2004; Reynolds and Vince 2004).

There are of course various ways of defining critical reflection, but in simple terms it refers to the ability to reflect on experience in order to make fundamental changes in thinking and practice. The nature of these fundamental changes depends on the understanding of what is critical – for some this simply refers to significant changes in meaning perspective (Mezirow 1998), for others it refers to developing an awareness of the ways the social status quo is maintained and therefore the ways in which power operates socially (eg. Brookfield, Fook). Critical reflection is potentially a more complex concept than either reflection or reflective practice, since it potentially draws on both concepts, as well as critical perspectives, to

develop a theory base. In addition, some conceptions of critical reflection also draw on notions of reflexivity eg Fook & Gardner (2007).

However, one of the main difficulties in coming to understand the whole field, is the extent to which major terms have been conflated, and various theories, used to various degrees, in developing the concepts. Indeed, it is widely agreed that definitions of reflection and critical reflection share little consensus, and that the literature is not always rigorous in defining them (Fook et al, 2006). Given also that the literature on critical reflection spans many different disciplines and professions (eg. sociology, philosophy, medicine, law, social work, management) which draw on and contribute to organisational learning literature and educational literature in varying ways, any overview is at risk of over-simplifying and also over-complicating the understanding of how it is used. Much of the literature attempts to speak within disciplines or professions, and so tends to refer mostly to literature in specific areas. Developing therefore an interprofessional understanding of the field is difficult (Fook et al, 2006)

In terms of a basic comparison, it is perhaps helpful to understand *reflection* as referring to the broad ways in which we change our thinking in order to make meaning of experience. *Critical reflection* refers to the more fundamental types of reflection. *Reflective practice* is perhaps best understood as the processes of reflection which allow meaning to be made of professional practice experience in order for future practice to be improved.

Associated terms

Reflexivity as a concept probably derives more from the sociological field eg. (Giddens 1991; Giddens 1992) and the field of social science research. It refers in simple terms to the ability to trace the influence of self in social contexts, and therefore also an understanding of how social, cultural and structural dimensions are played out in individual experience (Fook, 1999). In research the concept of reflexivity is particularly important as it points up the influence of the researcher's own social positioning on the research act and process, and therefore on the types of data found and its interpretation (Fook, 1999). It is a useful adjunct in the process of critical reflection/reflective practice since it provides a clear framework for understanding the influence of social positioning (and associated language use and narrative construction) on professional practice. (eg. (Taylor and White 2000); Fook & Gardner, 2007).

It is important to include the term *criticality* here, as it is sometimes assumed that the purpose of critical reflection is to teach/learn to be critical. Being critical can however be defined in various ways, sometimes referring more specifically to particular intellectual skills, and in other cases referring to an awareness of the operation of power, and a freeing from any associated restrictive beliefs. The latter perspective is associated with the emancipatory educationalists such as Freire. In a later section (2.2.3) I outline Brookfield's understanding of criticality.

2.2 Key perspectives/theories

As mentioned earlier, critical reflection broadly understood refers to the processes whereby more fundamental changes are made in thinking in order to make meaning from experience. Yet there are different ways of theorising what these processes and more fundamental changes might be. In this section I outline the major perspectives on this. These include:

1. transformative learning;
2. postmodern and poststructural thinking (including narrative, language, discourse and deconstructive) approaches;
3. critical perspectives and other emerging perspectives.

However, one of the clear characteristics of the critical reflection field is that there do not appear to be major divergences in perspectives. Although different theories may be used to provide substance to different understandings, in many ways the differing perspectives are not necessarily mutually exclusive, and in some cases may complement each other. May conceptions indeed will use a range of theories to explicated their understanding of critical reflection. Fook's work is an example of the latter, drawing on reflection, reflective practice and using concepts of postmodern thinking and reflexivity within a broadly critical framework.

However it is useful to understand the basic tenets of the major theories which are used to flesh out critical reflection. I outline each below.

2.2.1. Transformative or transformational learning

The major exponent of this approach is Jack Mezirow, the influential adult educationalist. The transformative learning theory developed by Mezirow (1990, 1991, 1994, 1997, 2000) has spawned a great deal of other developments (eg. Cranton, 1994 & 1996 and Marsick, 1987) in the management, workplace learning, and adult education fields. .
Although Mezirow has developed the broad transformational learning approach, he sees critical reflection as integral to this form of learning.

"*Transformative learning refers to the process by which we transform our taken-for-granted frames of reference.....to make them more inclusive........,and reflective so that they may generate beliefs and opinions that will prove more true or justified to take action*" (Mezirow, 2000, pp. 7-8).

Mezirow places much emphasis on differentiating the different levels of cognitive frames (meaning perspectives, habits of mind, mind sets), and posits that reflection is only critical if it involves reflection on premises and achieves perspective transformation (1991). In addition, he differentiates many kinds of critical reflection, which may involve either objective or subjective reframing, and many different types of assumptions which may be unearthed (1998). He links critical reflection and transformative learning in the following way:

"*Transformative learning refers to effecting transformations in frames of reference within the scope of one's awareness through critical reflection on assumptions (CRA)". (*Mezirow, 1998, p. 190)

Critical reflection in assumptions involves the active construction of knowledge.

2.2.2 Postmodern and poststructural approaches (includes language, discourse, narrative and deconstruction).

Whilst many usages of critical reflection may rely implicitly on postmodern, poststructural and or feminist understandings, very few make these understandings explicit. However, where there are attempts to theorise the concept of critical/reflection in a more substantial way, there is some reference to these perspectives eg. (Grace 1997; Bleakley 1999; Fook 2002; Johns 2005) (Rolfe, Freshwater et al. 2001; Freshwater 2002; Fook and Gardner 2007).

Briefly, such approaches emphasise the role of "linear" and "unified" thinking in modernist approaches (Parton 1994)and the postmodern attempt to move beyond the limits of such thinking. This opens the way to include many different types of knowledge or perspectives, and for that knowledge to be developed using many different processes. This points up the connection between knowledge and power, showing how some perspectives are dominant and others dismissed. One way in which this happens is through the operation of language, and in its broadest sense, discourses, or ways of communicating about phenomena, which actually shape and construct our knowledge of these, and support the dominant perspectives on them.

Some writers of critical reflection literature tend to use Foucauldian conceptions of power (eg. Brookfield, (2005); Fook & Gardner, 2007) but it is difficult to attribute this perspective to any one author, as so much has been written about postmodernism or poststructuralism. Some writers (Fook & Gardner, 2007) also include the influence of binary thinking as an essential concept in understanding how we construct oppositional categories. This is also instrumental in the creation of difference. Such understandings are all useful in providing a framework for deconstructing how power operates in the narratives of individuals. Postmodern and poststructural thinking therefore provides a broad base for analysing how individuals participate in power through the types of language and discourse they use in constructing their narratives about their experiences. The idea of discourse analysis and deconstruction as

similar to critical reflection has been developed by several authors eg. Ellerman, (1998); Rossiter, (2005).

The narrative approach itself seems to be widely popular in providing a framework for reflection, reflective practice and critical reflection (although it might be argued that reflection based on a purely narrative approach does not necessarily flesh out how reflection is critical). Examples of authors include: Gherardi & Poggio (2006); (Taylor 2003; Taylor 2006); (Frost 2006)and (Lehmann 2006). The use of narratives as an approach seems to fit easily with the ways in which individuals tend to speak about their experiences in everyday life, and so provides a good raw material for further reflection. Narrative analysis and inquiry are related movements which are gaining popularity in many of the professions, and may also be seen as a way of enacting critical reflection. Johns (2002), p. 202 in speaking of nursing practice, argues that: *"The narrative is a structured critical reflection that integrates assessment, evaluation, planning and intervention within an unfolding clinical situation."*

2.2.3. Critical perspectives

In simple terms, critical perspectives maintain a focus on power, and how domination is socially maintained. Reflection is therefore critical when it allows people to understand how their own experiences shape, and are shaped by, social conditions which are intertwined with the operation of power. Critical reflectors are able to see how they themselves participate in creating and maintaining power structures and relations. This perspective obviously draws heavily on the writings of various critical theorists such as Habermas, (Redmond, 2004) and Foucault (Lovelock and Powell 2004). An understanding of critical reflection from a critical perspective therefore relies heavily on the specific theorist which is being used. Since there is so much written on critical theory, Fook (2002) tends to conflate the basic approach into 5 core themes: first, the recognition that power is both personal and structural; second, that individuals can participate in their own domination; third, social change is both personal and collective; fourth, knowledge is both empirical and constructed; and last, the importance of communication and dialogue.

Perhaps the best known critical reflection writer from the critical perspective is Stephen Brookfield (1995). Brookfield has written extensively on adult education and critical theory (2005) but also more specifically on the concept of critical reflection eg. (1990; 1991; 1994; 1995; 1998; 2000a; 2000b; 2001a; 2001b). For him, critical reflection is primarily about "hunting assumptions" (1995, pp. 2-3) and what makes it critical is the focus on assumptions that are to do with power. The model uses four lenses through which to reflect on these assumptions: autobiography (which includes the importance of one's own experience and the emotional aspect of this); the learner's eyes; colleagues experiences; and theoretical literature. These provide useful frames for providing different perspectives, and by looking through these different frames, the perspectives and assumptions of the learner are thrown into clearer relief.

In other work, Brookfield takes care to differentiate critical reflection from the broader concept of transformative learning: he argues that critical reflection is more particularly about ideology critique (2000 & 2001a). In this respect, his work is more explicitly based on critical theory perspectives than Mezirow's, although the latter claims this to be the case. Brookfield, in yet other work, has developed understandings of critical theory for its use in adult education (2005) as discussed in section 2.1. In this work he identifies four traditions of criticality (2005, pp. 12-18) which have implications for the way critical reflection is theorised: ideology critique (the awareness of how socially dominant and potentially self-defeating beliefs may be internalised and maintained by individuals); a psychoanalytic/psychotherapeutic tradition (emphasises the role of adult inhibitions acquired as a result of childhood traumas); analytic philosophy (emphasises abilities to become more skilful in argument analysis such as logic, weighing evidence, forms of reasoning and judgement making); and pragmatic constructivism (which involves focusing on the way people learn to construct and deconstruct their own experiences). In some work he sees these four traditions as defining four perspectives on critical reflection (Brookfield, forthcoming).

Fook & Gardner (2007) also argue that critical reflection has an important values dimension: an overarching purpose of critical reflection is to both create a socially just environment which is both equitable and democratic. By making connections between the personal and structural,

and emphasising the importance of communication, critical social theory points to how a critical reflection process might help us forge bridges between our own experience and that of others to bring about desired social changes. As Mezirow points out:

"precipitating and fostering critically self-reflective learning means a deliberate effort to foster resistance to ....technicist assumptions, to thoughtlessness, to conformity, to impermeable meaning perspectives, to fear of change, to ethnocentric and class bias, and to egocentric values" (1991, p. 360).

2.2.4. Other emerging perspectives.

Contrary to what might be expected, there is little explicit mention of feminist perspectives on critical reflection. Issit (2000) and Gherardi & Poggio (2006) are two examples. Perhaps it is assumed that feminist perspectives are so compatible with the concept of critical reflection that there is no need to make the perspective explicit.

As the concepts of reflection and critical reflection are further developed, there are attempts to further theorise them using different theoretical bases. Some of the newer ones include spirituality (Dawson 2003; Ghaye 2004), Buddhist and Native American lore (Johns 2005). These moves are perhaps also in line with corresponding increasing interest in such bodies of thinking in the professions, and even broader society more generally.

Some of the newer attempts to theorise critical reflection include a focus on embodiment, including more artistic aspects eg. (Froggett 2006) and a recognition of the role of emotion and better attempts to theorise what it is and its role in reflective learning eg. (Bilson 2006).

2.3 Key debates

There are surprisingly few major differences of perspective in the critical reflection field, which in some ways means there are few glaring debates arising from differences in perspective. In some ways, given the relative lack of clarity about the term critical reflection, and the less than rigorous way it has sometimes been written about, it is difficult to identify major disparities.

There are of course criticisms relating to some approaches. For instance there has been some longstanding criticism of Schon's approach as being apolitical (Smyth 1988). The lack of empirical research has also been noted (Fook et al, 2006, p. 18). There is some debate also about how critical it is possible to enable learners to be (Fook et al 2006, p. 19), and some recognition that there may be major barriers to reflection, and indeed a "dark side' (Brookfield, 1994 & 1995). In addition, many writers note the down side of a concept which is loosely defined – it is open to co-option by many different interests (eg. Issit, 2000).

One of the major trends now emerging in the literature is a criticism of the predominant focus on the individual in much of the critical reflection literature. There are increasing calls to develop and research critical reflection in organisational context (eg. Boud et al, 2006; Reynolds & Vince, 2004; Gould & Baldwin, 2004), and there are beginning attempts to develop a theoretical framework for how this might be done in these works and others (Ghaye 2005). Whilst there is reasonable argument to support the view that much of the writing on reflection makes assumptions that focus on individual learning however (Boud 2006), there is not much work which attempts to theorise the connection between individual and organisational reflection. As well, there do seem to be assumptions that individual reflection is necessarily different, or separate from, organisational or more collective reflection. This appears to be one of the areas in which much further work is needed. Fook & Gardner (2007) for instance, base their approach to critical reflection on an explicit concept of ideology: that individuals internalise and maintain aspects of their social contexts, so that there is an integral link between individual thinking and social behaviour. A focus therefore on the thinking of individuals does not therefore mean that collective aspects are being ignored, as individual thinking may embody social ideas which are needed to reinforce collective behaviour.

2.3.1 Critical reflection in health and social care

Above I have focussed in the main on reviewing the major trends in all literature written on critical reflection. In this section I will confine myself more particularly to literature written from the health and social care field. Again this is not as clear cut as it may seem, as not all authors are clear about their disciplinary background or audience.

In the field of health and social care, the writing comes predominantly from the nursing profession, although medicine and allied health appear to be increasing their input. Key nursing authors are: Johns (2000; 2002); Freshwater (2002); Johns & Freshwater (1998); and Taylor (2000). In the health professions more broadly, Kember (2001) and Ghaye (2005) and Ghaye and Lilyman (2000a; 2000b; 2000c) are major authors. Ghaye currently edits the newish journal *Reflective Practice* which appears inter-disciplinary in focus.

In social care, the main authors/editors of books are Gould & Taylor (1996); Gould & Baldwin (2004); (Fook 1996); (Napier and Fook 2000); Taylor & White (2000); Redmond (2004); Fook & Gardner (2007); and (White, Fook et al. 2006). Ruch's work (2002; 2005a; 2005b; 2007) taking a predominantly psychodynamic or relationship based focus, is beginning to become influential. Morley (2004; 2008) takes a postmodern and critical perspective and is also becoming influential.

Again, given the breadth of the area, I will discuss mainly broad trends. (See Fook et al (2006) for a more detailed discussion). The literature in health and social care, tends to focus more on what critical reflection is, and how it should and can be used in both the education and practice of professionals, rather than reporting on empirical research. The perspectives taken on it vary, and do tend to reflect the main perspectives used in the broader fields. For instance Johns, Freshwater and Ghaye tend to take a broadly critical (as in critical social theory) perspective. Kember is less explicit. Taylor uses Habermas. Gould is less explicit regarding theoretical perspective, whereas Taylor and White clearly come from a more linguistic tradition, and Taylor (2006) tends to make use of narrative approaches. Whilst Fook's earlier writing (1996) was more clearly based on the work of Argyris and Schon, later work is more explicitly critical, but also incorporates other traditions (Fook & Gardner, 2007) Redmond's (2004) work is also more eclectic in theoretical base. Ruch (2002, 2005a,b,c) is interested particularly in child care, and in the ways which reflection can be used to support workers and to address the emotional aspects of practice. She tends to write from a psychodynamic and relationship-based perspective. By putting the "self" at the centre, rational, intellectual and emotional awareness can be integrated (2002).

It appears that the earlier influences in social work was the work of Argyris and Schon, referred to in an oft-quoted article by Papell & Skolnik (1992): "The reflective practitioner: a contemporary paradigm's relevance for social work education". Whilst much of social work writing on critical reflection may be seen as a further development of this framework (eg. Fook 1996 for applications to practice research, and Napier and Fook (2000) for applications using critical incident analysis), there have been later calls to introduce a more explicit interest power and empowerment, anti-oppressive perspectives eg.(Issitt 1999) and deconstructive analyses (eg. Ellerman, 1998).

Gould & Taylor's (1996) and later Gould & Baldwin's (2004) work to some extent reflects the trends in critical reflection more broadly – a shift from an emphasis on the learning/education of the individual learner, to an interest in more organisational issues related to learning. Both edited volumes include chapters from a variety of authors on a variety of topics which seem to share little intellectual or theoretical structure, presumably reflecting the state of the field more generally. Taylor (1996) summarises the main themes which arise from Gould and Taylor's 1996 edited collection. These are perhaps a precursor to the sorts of themes taken up in further work: the need for students to learn how to use knowledge in practice, and the potential for creativity and agency involved in this; the need for organisational and learning structures/discourses to support such reflective practices; the use of specific tools such as imagery; the difficulties of designing assessment tools which promote reflection; and lastly the contribution of critical reflection in supporting diversity within a postmodern context.

These sorts of themes are taken up in various ways in the health and social care literature. Many book chapters and articles, if they are not providing an argument for the importance of

critical reflection either for the education or practice of professionals, tend to be an outline or discussion or evaluation of the design and implementation of a particular unit in a higher education institution eg. (Duke and Appleton 2000) or a discussion of a number of tools which can be used for reflection eg. (Hughes and Heycox 2005). Others discuss the use of reflection in specific programs, such as in developing participation eg. (Cameron, Hayes et al. 2000). Very little literature attempts to develop more sophisticated theoretical frameworks. (Sue White's 2006 chapter using the image of the "trickster" is a notable exception to this). Indeed, the volume edited by White et al (2006) makes an attempt to graft more structure into our understandings of the way critical reflection is seen, by including pieces which focus on theoretical frameworks, professional learning, education and research. There is some acknowledgement that these areas are all potentially integrated with the use of critical reflection.

2.4 Connections between critical reflection, organisational learning and learning from experience.

Taking a wide view, the three fields originate from different agendas, which nevertheless share some common interests. The field of organisational learning clearly speaks to an interest in better workplace practices. Learning from experience emanates from an interest in education. Critical reflection is not a disciplinary area like the others, but refers more to a specific tool or process for learning which may be used to harness learning from experience for organisational learning. Not all organisational learning however is about learning from experience, and not all learning from experience necessarily involves reflection or critical reflection (although many would argue that reflection is integral to learning from experience). Critical reflection is essentially a more practical activity, often theorised from its practice, whereas both organisational learning and learning form experience, whilst enjoying practical aspects, tend to be theorised (and to some extent researched) in more systematic detail. However this also means that there is much more literature in the critical reflection field on actual models for using critical reflection in a variety of learning situations (which do not necessarily fit with organisational learning, or are even explicitly connected with learning from experience theories).

In terms of understanding their fit with each other, it is probably easiest to see them as three fields which overlap at some point, such that there are common elements between the three fields, but also elements of each which are not common with each other.

However it is the commonalities I wish to focus on in this section.

Each of the three areas shares a common interest in how people learn from everyday experience. Since much of this experience for adults happens in the workplace, then there is an identifiable interest in learning in organisations. Both organisational learning theorists and and critical reflection authors draw on theories of learning from experience (eg. Dewey, Mezirow, Boud), but each field has also developed its own theory from this in relation to each particular field.

In terms of theoretical perspectives, the review has shown where critical reflection might fit regarding the organisational learning field.

Reflection and critical reflection both clearly fit with the developing social (as opposed to individual) perspective on organisational learning. Such a perspective emphasises the social and cultural nature of learning, and the idea that learning is an evolving interactive process of creating relevant knowledge within social/cultural contexts, rather than a more static process of receiving static knowledge from an external source. Elkjaer's (2003) formulation of social learning theory, which combines both epistemological and ontological learning (learning about knowledge/skills as well as ones role/identity/place within a professional community) provides a sound underpinning for identifying the dual aspects of learning which critical reflection involves. Learning from experience in this sense involves reflection in order to learn both how to be and how to do. Several of the theories which fit with this perspective might

provide credible frameworks from which to theorise how the critical reflection process works in organisational learning.

For instance, critical reflection may provide a tool for organisational learning which helps to integrate personal identity, emotion and power in enhancing learning. For example, in trying to enhance a notion of organisational identity, critical reflection may be helpful in recognising what individual identities are and their importance in the workplace. This in turn enables creation of organisational identities congruent with individual identities, and this helps workers preserve a sense of their own integrity.

By recognising, allowing expression of, and accepting the emotional elements of professional practice, critical reflection may provide invaluable support in sustaining workers in difficult or anxiety-producing work situations. It may also assist in managing some of the organisational dynamics which are driven by emotions. By understanding how power works (implicitly and explicitly) in organisations, critical reflection may help workers gain a sense of their own power, and see different ways in which to create organisational changes. It may also be seen as a tool which aids sensemaking, and may also be theorised using a sensemaking framework (Weick), particularly given the common idea that sensemaking, like reflection, is triggered by a discrepant experience (Weick, 1995).

Additionally, critical reflection and social perspectives on organisational learning have a common interest in several key concepts: dialogue, narrative, tacit knowledge, and the democratic/emancipatory aspect of organisational practice. Critical reflection may provide specific ways in which these concepts are utilised in organisations. For instance, critical reflection may be used as a form of dialogue which *"involves learning how to learn from one's own experiences and learning how to learn from the experiences of others…"* (Schein, 1993, p. 82). It may aid with the relational practices that are needed for dialogue: opening spaces for creating shared meaning; reconstituting power relations; and providing cultural tools to mediate learning (Boreham & Morgan, 2004, p. 315).

Critical reflection as a theorised process, also fits well with the practice of using narratives for organisational learning ie. critical reflection may provide a theoretical framework and process for learning from specific narratives in the workplace. The concept of tacit knowledge is commonly important, as critical reflection is a process which may be used to "mine" tacit knowledge, and may also therefore be used as a process for making tacit knowledge more accessible and therefore more organisationally acknowledged and changed. The concern with democratic values, which is made explicit by some advocates of the learning organisation (eg. Senge), is a shared concern with many critical reflection exponents (eg. (Cressey 2006). Critical reflection in short, may provide both a specific tool and process for bringing about the changes in thinking necessary to a learning organisation. To quote Senge (1990, p. 12) *"A learning organisation is a place where people are continually discovering how they create their reality. And how they can change it."*

In terms of the learning from experience literature, this literature provides invaluable frameworks for theorising the critical reflection process. As stated many times, reflection is seen as integral to learning from experience, and indeed in some ways they are defined in similar terms. (There is some argument of course that reflective perspectives are not the only approaches in experiential learning). Both critical reflection and learning from experience are seen to be about making meaning from life experiences. The learning from experience literature, in this sense, provides some frameworks for the process which is said to take place in learning from experience. The work of Dewey, Mezirow, Boud (and to some extent Malinen, 2000) provide essential elements of the learning process which may be involved in critical reflection. The process involves both cognitive, emotional and action elements throughout, and some:

- initial discrepant experience;
- examination of this with regard to both past experience and cultural contexts;
- re-examination of past experiences/interpretations;
- reconstruction of past and present experiences in this light;
- testing of the resulting interpretations (in action).

Whilst the process as written appears to imply an essentially individual process, theories such as Dewey's do emphasise the essentially cultural nature of the learning ie. that learning from experience involves becoming conscious of the layers of culture which are inextricably woven

into any experience. This is a clear point of congruence with some theories of critical reflection, which emphasise that critical reflection involves a deconstruction of socio-cultural influences.

Such a process incidentally holds commonalities with Weick's process of sensemaking. Again, depending on perspective, such a process may be seen as indicative of the whole critical reflection process, or specific critical reflection tools may be used to guide any particular stage of the process.

There appear then to be clear common theoretical frameworks between the three fields, and suggestions for a common process and tools which might be used. Where does this leave us in terms of possible models for using critical reflection in organisational learning?

2.5 Possible models/methods for using CR in organisational learning/review in social care

2.5.1 Theoretical framework.

It appears clear from the above that the theoretical frameworks needed to understand and use critical reflection at organisational levels are already starting to be developed. The social perspectives on organisational learning provide a clear framework, and specific aspects of these. Overall, critical reflection needs to be understood as helping with learning both about "being" and "doing" in an organisation. For example:

- understanding the connections between individual and organisational identity (and ways of preserving individual integrity)
- understanding the need to acknowledge, express and accept emotion in individual work and organisational dynamics, to both support workers and improve organisational processes and practices
- providing awareness of power (both personal and organisational) in allowing workers to see different possibilities for change
- providing the means for "sensemaking" in organisations
- mining the tacit knowledge (about both being and doing) in individual and group/organisational practices in order to make these explicit and allow re-formulation.

2.5.2 Possible models of the process

The generic learning from experience process outlined above may provide some general guidelines for a critical reflection process. This could serve as an overall organising framework for the model (critical incident analysis) already being used. In addition, more specific tools/processes may be developed, based on use of other types of narratives (organisational narratives perhaps), or different types of dialogue spaces could be set up for safe communication or the exploration of other people's experiences.

2.5.3 How individual learning becomes organisational

Use of the material on how individual learning becomes organisational may be helpful. Both Nonaka's & Takeuichi's(1995) and Crossnan et al's (1999) frameworks are useful here. For Nonaka and Takeuichi (1995), there are four main processes of knowledge conversion:

i. socialisation – tacit - knowledge shared between individuals formally or informally;
ii. Externalisation – tacit knowledge becomes explicit through codification or formalisation;
iii. Combination- explicit information is spread to other levels of the organisation; and
iv. iv. Internalisation – explicit knowledge is routinised back into tacit levels at individual or team level.

Crossan et al (1999) posit four processes of organisational learning: intuiting, interpreting, integrating and institutionalising.

    i.   Intuiting involves the recognition (pre-conscious) of patterns inherent in personal experience.

    ii.   Interpreting is the communication (through words or actions) of this to oneself and others.

    iii.   Integration refers to the process of developing shared understanding and co-ordinated action.

    iv.   Institutionalisation is the process of ensuring that routinised actions occur.

For example, a process could be developed (perhaps using either individual or group narratives/critical incidents as starting material) to:

    i.   Examine/share the implicit thinking involved in both personal/organisational experiences.

    ii.   Identify/construct shared meanings from these.

    iii.   Identify/develop ways in which this shared meaning can be enacted and supported at team and organisational levels.

    iv.   Implement these, and revisit their implementation.

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iii. critical reflection under the rubric of learning from experience

In this final part I include two publications (book chapter and journal article) which begin to develop the concept of critical reflection more closely intertwined with the framework of learning from experience.

1. *"Beyond reflective practice: reworking the 'critical' in critical reflection"*

This question of the importance of the whole experience, both the experience of changes brought about through critical reflection, and the role of experience itself in the critical reflection process, is pursued in an empirical way in another book chapter "Beyond reflective practice: reworking the 'critical' in critical reflection". In this chapter I identify the changes taking place in the critical reflection process by analysing three students' accounts of a critical reflection process (undertaken in a post-graduate degree in which critical reflection is central). Although the chapter is essentially based on empirical research, I have included it in this section on theorising critical reflection, as it is intent is more about refining the theoretical grasp of the idea of the "critical" in critical reflection. In addition, I use the idea of learning from experience as a framework to help with this.

Overall then, the chapter is also trying to achieve a number of goals: to develop a theoretical framework for linking the "individual and social" through critical reflection; to further develop the framework for critical reflection to include holistic experience (and the emotions); and to use these understandings to gain a more sophisticated idea of the "critical" in critical reflection.

The chapter begins by restating the basic "individual and society" tenet which underpins my work, and makes an argument for a more integrated perspective, allowing the influence of the "social" to be

recognised at individual level. By analysing the changes taking place for the three students, I conclude that often disparate assumptions (implicit in an identified experience), and an ability to identify which ones are fundamental fundamental, is only arrived at through a connection with a significant personal experience (which may well have occurred some time previously). Personal experience is in this sense the connecting agent, not sets of assumptions or a theoretical framework (which are often only grafted on later, in order to make sense of the experience). To quite from the chapter: *" In this sense not only is critical reflection a process of learning <u>from</u> experience (Boud et al, 1985), but it is also a process which may depend on experience for deeper learning at the assumptive level."* (last page)

Other conclusions relate to fleshing out the idea of how individual and social realms relate, calling for a more integrated framework, especially relating to understanding the "politics of the personal"; a more socio-cultural understanding of emotion; and for linking individual agency with collective actions.

Again, a quote from the chapter sums up my revised definition of critical reflection, which might apply usefully in organisational learning: *" I would now articulate critical reflection as involving **the ability to understand the social dimensions and political functions of experience and meaning making, and the ability to apply this understanding in working in social contexts."***

INSERT CHAPTER 3 HERE from Bradbury, H., Frost, N., Kilminster, S. & Zukas, M. (eds) <u>BEYOND REFLECTIVE PRACTICE: new approaches to professional lifelong learning</u>

2. *"Using critical reflection to support health promotion goals in palliative care"*

This paper demonstrates my attempt to integrate my thinking about the holistic nature of experience into my definition of critical reflection. This paper was written essentially for a health audience, so was also deliberately constructed to be accessible to an audience from a non social science background. The section entitled "***Critical reflection and what it can achieve"*** includes a basic formulation of critical reflection, relating it much more to notions of learning from experience, and connecting the search for assumptions (in particular assumptions about our social world), and the emotional aspects of this, under this rubric. Again I quote from the paper to illustrate how all these seemingly disparate aspects have now come together in the way I conceptualise critical reflection.

"Because experience usually encompasses at least both sensations and ideas (Usher, 1993) what we are often creating in this reflection process is something broader than both. This might be termed a system of meaning. Reflection thus allows us to incorporate the new experience into a sense of who we are emotionally, intellectually, socially, and perhaps spiritually. In turn, this process of making meaning of new experiences, may also involve re-examining and reformulating basic beliefs, or guiding life principles.

*We might therefore broaden our definition of critical reflection to include making meaning of experience: **critical reflection is a process of learning from (and making meaning of) our experience, initiated by examining our fundamental assumptions (and their role in creating/maintaining our social world), but extending to a re-examination of past experience, and a reformulation of guiding principles for further action."***

I have bolded the last definitional statement, as it embodies my changed way of framing critical reflection which integrates processes of examining assumptions, and the critical aspects of this, with notions of learning from experience and formulating principles for further action.

It is instructive to compare this definition with the earlier one published in the 2007 book: ***"unsettling individually held assumptions to bring about social changes".*** This illustrates the extent to which my thinking has developed about critical reflection, and how I have been able to

integrate disparate perspectives into an understanding of critical reflection which I think makes it all the more effective as a holistic learning method.

Critical reflection and health promotion in palliative care

J. Fook & A. Kellehear

Abstract: The use of health promotion approaches in palliative care services is growing in local and international popularity. However, its uptake is partly retarded by a lack of understanding of both content and process by clinical staff whose practice has been more focussed on bedside care rather than community work. Critical reflection is a workplace learning process that can assist clinical staff with re-orienting and applying their existing personal experience and skills toward a broader social approach to care. This paper outlines a model of practice for critical reflection in palliative care that can enhance learning and practice for those adopting a health promoting palliative care approach in their current service.

Key words: critical reflection, health promotion, workplace learning, professional development.

Introduction

There has been a significant surge of interest and writing about health promotion in palliative care in the last 10 years. Concepts of health promotion have been attractive to palliative care practitioners for a range of reasons. These include the fact that the central components of health promotion - education and community development for examples - have been viewed as more effective extensions of 'whole person' care when viewed in terms of the many and diverse social and spiritual commitments associated with this overarching concept.

Furthermore, unlike the more amorphous and multidisciplinary nature of 'psychosocial' care, health promotion, as part of a broader public health approach to care of individuals and community, has specific, well-defined ideas about prevention and harm reduction. Those latter ideas are well understood in the wider scientific medical establishment, the broader health services policy and practice culture, and the health education debates

present in a diversity of professional areas from medicine and nursing to counselling and social work.

But there continue to be barriers to the uptake of health promotion ideas despite the currency of the ideas and the widespread use of them in other health service specialities. Although interest in health promotion ideas are strong everywhere in the health sector putting these ideas into practice can be viewed as difficult (Carlson & Warne 2007). This paper offers a practice suggestion from learning theory – critical reflection - that might successfully address the general reticence in committing to health promotion in palliative care. The aim of this paper is to describe how this new form of learning can easily be employed in any professional development programme within the practice setting.

We organise the paper in the following way. First, and for readers unfamiliar with health promotion theory, we will define health promotion in general and briefly outline its shape and history in palliative care. Major literature that explores this new approach will be cited along the way. Because this essay is not about advocating health promotion but rather addressing the barriers to its uptake we will then describe critical reflection and outline a generic model for professional use in palliative care. We conclude with a summary of the benefits and problems of critical reflection as this applies to its future use in palliative care.

What is health promotion in palliative care?

Health promotion may be understood as all efforts to promote well-being in a community in the service of preventing disease and harms. Taking the ideas of prevention, harm reduction and early intervention to its logical conclusion, health promotion encourages social changes in a community or society that enhance health and prevent disease and accidents. The main tools for these changes are mostly education and community development but they are also

regularly complemented by changes to policy and law, changes to the physical environment, and or the working together with 'non-health' institutions such as the media, schools, or workplaces. In this last way, 'social marketing' – selling the value of good health and safety – has been an essential part of all health promotion strategies.

Furthermore, health promotion is also characterized by a *style of working* with communities. Professionals and health services are encouraged to work *with* rather than *on* communities. This is an injunction to form partnerships that recognize different forms and sources of 'expertise'. Health professionals may have expertise about disease and clinical assessments, for examples, but particular communities will have expert knowledge and skills about customs, values or practices that will prevent or promote health behaviours in their settings. This collaborative style of working is commonly referred to as a 'participatory relations' and is frequently contrasted with relationships based solely on professional authority or didactic forms of health education – 'we' (professionals) know what is best for 'them' (patients).

Health promotion is sometimes known as the 'new public health' because of its different emphasis from disease management and cure. Heavily promoted by the World Health Organization since the 1980s (Ottawa Charter for Health Promotion 1986), health promotion is not only an accepted part of public health but also a key part in several other professions including nursing, teacher education, social work, and youth work to name only a few (Issitt 2003). The use of health promotion in palliative care is new. Although there has been a longstanding recognition of the fact that there is a raft of psychological, social and spiritual morbidities and mortalities associated with dying, bereavement and care, community development and health promotion activities directed at these problems have only been recent. Historically, health promotion strategies have also taken a smaller role and received

less recognition than clinical, bedside care priorities because the long-standing emphasis and priorities have focussed on the terminal phase of illness.

Nevertheless change has been afoot, in part reflecting a worldwide 'policy shift in health and social care away from expert-led provision' towards service users, families and communities more broadly (Issett 2003: 174). These new public health approaches have been evidenced in palliative care by way of a steady stream of international publications from the USA (Rao et al 2002, 2005), Australia (Kellehear 1999, 2005, 2008; Pegg and Tan 2002), India (Kumar 2005), Japan (100-member committee 2007) and most recently in the UK (Russell and Sander 1998, Conway 2008, Monroe and Oliviere 2007, Sallnow et al 2009). Most of these initiatives have emphasized education, community development and policy change.

In Australia, for example, both professional associations (PCA 2003, 2005) and some state governments (Dept of Human Service 2004) have encouraged and supported health promotion efforts as part of the usual clinical and service offerings of all palliative care services. In India (Kumar 2005), clinical services have employed community development programmes not only to enhance continuity of care but also to improve access to palliative care. In the UK the recent release of the National End of Life Care Strategy has recommended efforts to raise awareness about death, dying, loss and care issues that make the links between clinical practice and health promotion even more logical. In Scotland, that gaol of targeting community action and attitude change has led to an explicitly stated commitment to health promoting palliative care (Scottish Partnership for Palliative Care 2008).

In all these developing contexts, the main barriers to uptake of health promotion initiatives have not been a lack of funding or interest and commitment. Rather there have been four

recurrent barriers to the uptake of this new approach. First, there has been slow recognition that the longer part of dying – and bereavement – occurs outside of direct service contacts. Secondly, there has been difficulty understanding how, in those non-service contexts - common psychosocial problems that beset our patients – sexual dysfunction, stigma and discrimination, depression, grief or meaning making in the face of suffering – might be addressed employing education and community development initiatives. Thirdly, there are difficulties in moving from a direct services, 'expertise' style model of professional working, to one that is highly participatory and based on mutual learning and partnerships. Finally, there has been a professional inability, at least initially, to understand how health promotion can be integrated into clinical practice – by all the different member groups in palliative care from social workers and nurses to doctors and volunteers.

Crucial to addressing these barriers in professional practice in other professions in health and social care, and therefore potentially of significant promise for the practice of palliative care, is the use of critical reflective learning. This can be part of formal studies, staff development, or embedded in a culture of organisational learning (Johnson & MacDougall (2007).

Critical Reflection in health?

Critical reflection – as a systematic, reasoned approach to thinking about practice – is equally new to palliative care as it is to health promotion. In palliative care it has been employed in multidisciplinary teams and among nurses to help improve communication with patients, enhance practice to better address patient needs, and as a way to review and improve professional problem solving (Duke & Appleton 2000; Cherin, Enguidanos & Brumley 2001; Kenny 2003; Bailey & Graham 2007). And while the use of critical reflection in the service of health promotion has been uncommon (Fleming 2007) the extra problem for

those in palliative care has been in learning, rather counter-intuitively, about how promoting 'health' fits with a mission to care for dying people and their families. However, we should be reminded at this point of the importance of the WHO definition of health that also emphasizes and promotes well-being (Naidoo & Wills 2009:4). Furthermore, 'quality of life' especially for those at the end of life, is frequently related more to 'quality' of social relationships than to physical or medical status (see Farquhar 1995; Carmel 2001; Victor et al 2004). And both well-being and the quality of social relationships are central targets of health promotion.

There are encouraging cases of the successful use of critical reflection in facilitating health promotion skills among practitioners working among people living with chronic illnesses. Hartrick (1998), for example, provides an early but tried and tested professional development process based on her experience working with a multidisciplinary group working with children and families living with asthma. Her initiative was designed to "change the focus from in-patient care to ambulatory or community-based care" (Hartrick 1998:219) - an aim consistent with a desire to alter the focus from in-patient palliative care to health promoting, community-based care.

Hartrick's overarching professional approach was to supply group sessions of critical reflection to participants in their practice settings, monthly, over the course of one year. In early sessions, participants would critically discuss and exchange ideas about what health promotion meant to each of them. In later sessions, practitioners were asked to deconstruct and reconstruct their practice experiences and possibilities and to think critically about puzzling, paradoxical or problematic features of health promoting practice. The incongruity between espoused values and the actual values in use surface in these sessions. Over time, these processes became imbedded in ongoing practice as each of the participants gradually

became both 'health promoters' and 'reflective practitioners'. So what then is critical

reflection and how does it achieve this practice improvement and integration?

Critical reflection and what it can achieve

Critical reflection involves examining the foundations of our thinking or practice (Dewey,

1933). In particular it requires understanding how these foundations might be influenced by

our social world (Brookfield, 1995; Fook & Gardner, 2007), such as our gender, social class,

current workplace or culture. Reflection is involved in the way we learn from experience

(Dewey, 1933; Boud et al, 1985) in that learning from experience requires us to examine

underlying ideas. Engaging explicitly in a process of examining the assumptions implicit in

actions (Schon, 1983), can therefore initiate an ongoing process of learning from experience.

Looked at in this way, critical reflection is something in which we all potentially engage

throughout our lives. However, for professional learning purposes, it is important to harness

our understanding and create awareness of how and when we actively undertake reflection,

in order to improve practice.

Speaking about critical reflection in these terms, however, can seem to reduce it to an

intellectual exercise. But what often happens when we examine our experience in-depth, is

that we are also making sense of our current experience in the light of past experience.

Usually this experience includes at least an emotional element (Boud et al 1985; Fook, in

press). Because experience usually encompasses at least both sensations and ideas (Usher,

1993) what we are often creating in this reflection process is something broader than both.

This might be termed a system of meaning. Reflection thus allows us to incorporate the new

experience into a sense of who we are emotionally, intellectually, socially, and perhaps

spiritually. In turn, this process of making meaning of new experiences, may also involve re-examining and reformulating basic beliefs, or guiding life principles.

We might therefore broaden our definition of critical reflection to include making meaning of experience: *critical reflection is a process of learning from (and making meaning of) our experience, initiated by examining our fundamental assumptions (and their role in creating/maintaining our social world), but extending to a re-examination of past experience, and a reformulation of guiding principles for further action.*

When understood in these terms, the potential of critical reflection for professional learning in general, and health promotion in palliative care, becomes more apparent.

There are four general ways that critical reflection is useful for professional learning (these are adapted from Fook & Gardner, 2007):

- Making changes in practice – critical reflection can often help address the "sticking points" or "blind spots" in practice, which are often based on unquestioned assumptions. Once "blind spots" are identified, this frees practitioners to develop new ways of working. It can therefore help practitioners become more creative, by assisting them to see other perspectives (Mezirow, 1990)and therefore other ways of doing things. It often frees people up to work better in teams, with other professional groups they might formerly have assumed subscribed to a fundamentally different value system (for example, female social workers often speak about being better able to work with male police officers (Fook, 2004).

- More effective practice – by helping individual practitioners understand social influences on their own behaviour (eg. family or cultural background; professional or workplace culture), critical reflection can help them devise practices which will be more socially effective or collectively viable. This understanding of how they operate in their own social contexts also functions to enable practitioners to gain a sense of the possibilities of their own influence relative to particular situations. This in effect empowers them to act, and to exercise their influence in more thoughtful and intentional ways (Fook & Askeland, 2006)

- More integrated experience – by assisting practitioners to make meaning of experience, critical reflection can help recognize practitioner experience (eg. Ruch, 2007), and actually use it more effectively in developing systematic frameworks for working. This can help reduce burnout, by allowing practitioners to find ways to bring their practice closer together with their fundamental values.

- More systematic professional and organizational learning - critical reflection can assist practitioners to be more open to learning from their own and others' experiences, by learning a process of turning their own experiences into systematic knowledge. This can also be applied at organizational levels, since organizational changes are also part of professional experiences. In this sense also it may function as a way of reviewing experience (both at individual and organisational levels) , and valuing its explicit contribution to professional work. (Fook, in press)

These points have particular relevance when applied to the four barriers to the uptake of health promotion in palliative care, as mentioned earlier in the paper. For instance, there

are often very fundamental and taken for granted assumptions in an "expertise" model of professional practice, which must be consciously and willingly changed in order to practice from a more participatory perspective. Given however, that most professional paradigms are based on an "expertise" approach, it is difficult for professionals to be aware of these assumptions, or be willing to change them. Critical reflection can assist in identifying these sticking points, and indeed even identifying where these taken for granted assumptions might be inhibiting change even where the practitioner subscribes to and openly espouses a more participatory approach.

For example, palliative care professionals may often feel the pressure to "get it right" at the end of life. It is as if the "normal" ethos of the "expert" professional (to be able to have the answers, and to fix up the ills of living) are somehow concentrated at the end of life, as professionals may feel that this is their last chance to prove their expertise in this case with this patient. In this sense, the expertise model of professionalism, and the need to feel in control, may be more intense in palliative care work than in other fields, meaning that there is even more need to unpick and acknowledge these assumptions, before the professional can find other ways to approach their work, and be open to alternative ways of understanding. They may need to acknowledge this "last chance to get it right" culture, before allowing themselves to work in more participatory ways with patients, carers, and the community.

Similarly, there may be powerful hidden assumptions regarding the "split" between clinical and community practice. Clinical and community worlds may be constructed as widely divergent, clinical practice being seen as more in-patient and institutional based, where as community work might be broader-based. This also leads to sets of assumptions regarding the sorts of services which are provided, in that work with communities is often seen to

involve educational strategies, whereas clinical work might involve medical treatments and other therapies. Once these sets of assumptions are unearthed, it may be easier for practitioners to see how common strategies may be applied differently in both contexts, and therefore easier for practitioners to move between the two worlds.

This split between clinical and community practice might also extend to the way professionals characterize themselves. For example, if professionals see themselves as educated and skilled for in-patient or bedside care, they may not easily see themselves also as people who can be skilled in some of the less direct methods required in community level work. For example, they may believe that people who have expertise in dealing with patients or families are able to work effectively at one-to-one more personal levels. Conversely they may believe that community practitioners need educational skills and be able to work on a more public level. Thus they may unwittingly limit themselves from taking on broader community-based roles.

Lastly, critical reflection can assist in helping the practitioner recognize the broader context of the palliative care patient, and that the bulk of their dying experience might take place before or outside direct contact with the palliative care professional. Expanding the practitioner's awareness of their own social context (by showing the influence of, for example, their workplace on specific actions they take) can help them appreciate the broader context of the patient. Such an awareness might help them devise new more socially based ways of working with colleagues (for example, through organizational changes in the way services respond to patient needs, or through devising ways in which sections of the local community might be able to address palliative care needs).

A model for critical reflection

It is widely recognised that there are many ways to critically reflect, and earlier in this article we have cited some examples. However one of the criticisms of critical reflection is also that it is difficult to implement in practice, particularly in busy workplaces (Ixer, 1999). For this reason, we present one model that we have worked extensively with. This has been used in many different settings with many different professional groups, and could be adapted for the palliative care sector. (This is summarised from Fook & Gardner, 2007). The model is both time limited and structured. It has a clear framework and techniques, which nonetheless allows for a fluid learning process. It could be used with small groups (5-6) palliative care workers, who might all be members of the one team (ie. could be organised in their own workplace), or who might alternatively come from different teams (ie. could take place in a more "neutral" setting). If the express aim of the critical reflection is to enable practitioners to overcome barriers to working in a health-promoting way, then it is best to work with practitioners who have already attempted some health promotion work. (In this way they will be learning directly from their own experience, which will be more effective in making deeper changes).

It is normally undertaken in two stages as follows:

Stage one

- Introducing participants to the concept of critical reflection and the ideas which inform it
- Soliciting an example of the practitioner's experience of working in a health-promoting way in palliative care, and using this as raw material to critically reflect upon. This example should be of a particular incident they experienced which they considered significant to their learning about health promotion practice.

- Engaging in a process of dialogue to examine deep assumptions which affect their palliative care and health promotion practice (by using questions specifically designed to unearth the ideas underlying the practice experience)

<u>Stage two</u>

- Using this process of dialogue to further explore the meaning of this experience and to formulate guiding principles for further practice on this basis. In this stage, practitioners will be articulating their own approach to working in a health promoting way in palliative care. This effectively means they are able to devise an approach to working which acknowledges and builds upon their own doubts or misconceptions of health promotion, and also draws upon their own existing skills and experiences.

These two stages are normally best separated by a period of time, in order that further reflection might take place between stages. However many workshops have been conducted where the 2 stages have been conducted over two consecutive days. Participants often report a preference for this approach, as it allows them to develop a more intense connection between their changed thinking and their changed practices.

Normally this process can be facilitated (by a designated facilitator who also participates as a learner) in small groups, where each participant in the group brings an example of their practice experience (a brief and "raw" description of an event which was significant to their learning). Group members act as peers, in assisting each other to critically reflect under the guidance of the facilitator. In the first stage, each participant is invited to present the description of their event to the group, who assists them to critically reflect on it, using questions which are specifically designed to elicit fundamental assumptions which influence their ideas about health promotion, palliative care and their own roles (and the origins of

these beliefs). Each participant should be allowed about 20 to 30 minutes to reflect on their incident.

Questions in the <u>stage one</u> might include asking about:

- participant's ideals (eg. what does your story of your experience say about what you believe to be ideal palliative care?); or

- beliefs about the profession and appropriate services or care (eg. what are you assuming about the medical profession and its role in palliative care? What are you assuming about how this differs from the role of the patient or carers?);

- their culture (eg. what are you assuming about how we should face death?);

- human beings generally (eg. what do your actions imply about the human capacity to face death?); or

- beliefs about the patient's experience (eg. what are you assuming about the patient's perspective and what might you NOT be aware of?)

The facilitator pulls the discussion together at the end of this stage one, for each participant, by asking what they believe their fundamental assumptions are (that have emerged from the discussion), and how their broader thinking has changed in the light of these. For example, some participants may have realised that they have been assuming that they should be able to "have all the answers", but that this assumption might leave out the perspective of the patient, and the patient's right to orchestrate the way they die. Their thinking might need to change to incorporate a full understanding of the patient's perspective.

In <u>stage two</u>, participants are asked to present their further reflections, using three key headings:

- what their fundamental assumptions are/were;

- what they feel has changed or needs to change (about their thinking); and

- how their practice has/will change/d as a result.

At the end of the second stage, each participant is asked to re/formulate their guiding principle/s for practice (with the help of the group). For example, a participant who has assumed they "should have all the answers" might further reflect in stage 2, that they were also assuming that their professional qualifications and standing requires them to have the answers. They may reflect that they need to change this thinking in order to allow for the expertise of patients. This may in turn lead them to develop ways of soliciting patient perspectives and collaborating with them to design a way of dying which fits their desires and circumstances. In finishing this stage, they may label this new approach as a "collaborative approach to dying", or some other label which they feel encapsulates the principles they are trying to incorporate. They might then be invited to link this approach with the more overarching health promotion framework.

Problems, benefits and prospects

Critical reflection is a promising but very new set of techniques and processes that challenges the way we learn as adults and as practitioners that are accountable to the patients and professions we serve. The core skills of critical reflection have still to be agreed, there are a plethora of competing models, and the evaluation of their effectiveness is in its early stages (Fook et al, 2006; Fleming 2007). In addition, little empirical research exists which systematically documents the benefits and outcomes of critical reflection (Fook et al, 2006). An exception to this is the work of Fook & Gardner (2007, p. 143) who claim that (from a systematic analysis of the evaluations of over 400 workshop participants) that benefits and outcomes fall into four main categories: those related to improved rationality

(eg. more considered and evidence-based actions); those related to the self and emotions (eg. greater self- awareness); those related to value-based practice (eg. more inclusive attitudes to differences in other colleagues and a less judgemental attitude); and lastly, those directly linked to practice, such as a better sense of professionalism (linked with a greater integration of the "professional" and "personal" selves) and a sense of having more skills.

Despite the claimed benefits however, it is important to note that poorly understood or poorly executed critical reflection can lead to self-absorption, and can mask poor educational practice. Although it can be liberating such processes can also lead to anxiety and trauma (Issitt 2003) and there is a significant downside experienced by people who critically reflect, and then find themselves out of step with the culture of their workplace (Brookfield, 1994). Critical reflection is also not a solution to problems in the work place. It is important that time is made available to those willing to participate in this form of professional development and that appropriate peer support is integrated into to any programme adopted (Fleming 2007:662).

Nevertheless, many of these cautionary observations should in no way discourage attempts to trial critical reflection as an emerging innovation because, among other positive features, many of the possible drawbacks apply to other forms of more accepted professional in-service education experiences. But with critical reflection the positives are significant.

Critical reflection has the distinct advantage that it focuses on the *social* aspects of both practice and the patient/client world (Johnson & MacDougall 2007:249). For practitioners whose work-a-day world is an inpatient one this re-orientation towards culture and community is essential. Critical reflection also maximizes critical, searching styles of thinking

about practice, creating a strong sense of confidence and freedom. It can maximise the connection with patients and clients, making practitioners more sensitive and person/community centred (Issitt 2003:179; Redmond, 2004). For practitioners in palliative care this can mean helping to examine the synchronicity and tensions between the personal and professional in matters to do with dying and grieving. This helps forge a deeper, perhaps more empathic relationship between self as professional and self as personal – an important and transcendent ability to overcome depersonalisation and 'compassion fatigue' in the workplace.

Simpson and Freeman (2004) also argue that the most valid conclusions must come from the deepest understanding and critical reflection can be useful in probing professional and social complexity in our relationships with patients and their families. In these ways, critical reflection helps support the building of trust and meaning, mutual knowing and mutual creating in matters to do health, end of life care, and also personal and community capacity building (McWilliam et al 1997; Mendis-Millard and Reed 2007). An improved sense of practitioner control can also provide practitioners with greater confidence and sense of control in offering health promotion learning that they themselves can model (Carlson & Warne 2007).

Conclusion

The establishment of a worldwide movement that extends and exhorts national health services to care for the dying and their families is barely 50 years old in places such as the USA and UK that pioneered these initial efforts. In other countries, the history of palliative care is considerably less and many countries have not yet adopted or have the infrastructure to join this vital approach to end of life care. In those places where palliative care has been established the first priorities have been devoted to inpatient care and clinical skills to

address the significant physical and psychological challenges of terminal care. Lately, there

has been a desire to more deeply explore the meaning of social care beyond what is possible

within an inpatient world. Health promotion, as an essential part of all major health services

has been recently adapted and trialed as a way forward to continue to develop a broader,

increasingly sophisticated offering to dying people, their families and the communities and

professionals who support them. Critical reflection is one important and innovative way that

these new approaches can be supported and encouraged for practitioners who share this

wider vision of social support in palliative care.

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c. Researching critical reflection

The earlier sections focused on the development of the practice and theory of critical reflection. However, as a social work academic, I am also concerned with how these experiences (both the experiences reported by practitioners, and the experiences of change) could be credibly researched. I wanted to do this for several reasons:

- To represent the complexity of practitioners' experiences, from their point of view, and as developed through the critical reflection process

- To be able to provide an evidence base regarding the benefits and outcomes of critical reflection (to help legitimate it as a credible process)

- To understand and represent the change process, so this could be used more effectively in professional learning

In this section I focus on my contribution regarding critical reflection and the need to research it. This takes the form of focusing on the need to better research (and to adequately represent) the learning experience and changes which take place in a critical reflection process. I include two chapters from my 2007 book which include a documentation of some of the changes involved in the critical reflection process; discussion of the issues involved in researching critical reflection; as well as a review of the outcomes of critical reflection (from what the literature claims and also from a number of empirical studies).

i. Documenting the changes which take place in the critical reflection process

This first chapter included here (chapter 6) represents the first attempt to document the complexities of the critical reflection process in detail. It provides a good illustration of the difficulty in representing the complex

and fluid process of critical reflection, using a number of different perspectives and frameworks.

The chapter begins (pp. 90-95) with a commentary on a presentation and reflection on one of Fiona's critical incidents (the DVD is available to readers). We chose to begin by presenting the material in this way partly because of our acknowledgement of the difficulty in representing the complexity of the process. This section also attempts to give an overview of the process in terms of identifiable stages which might typically emerge.

The remainder of the chapter details principles which we found useful in enabling critical reflection. These derive solely from our own experience of conducting critical reflection workshops. They are described, rather than theorised (that is, connected with other literature). As evidence of the struggle to connect different processes, on p. 101 there is reference to the connection between getting to assumptions and unearthing the fundamental meaning of the incident - both seem intertwined. Pp. 99-101 uses an analysis linking the personal and social as part of the process. P. 103 discusses the role of emotions in the process. On pp. 105 - 109 we give examples of common assumptions which are unearthed, in an attempt to give a flavour of the process from another perspective.

Analysing this chapter from a broader perspective demonstrates one of the ongoing challenges my work seeks to address: the issue of how to represent the complexity of experience in a coherent way. Clearly what is needed is an overarching theoretical framework which will give me the wherewithal to speak about the experience in a connected way. Naming and referring to different sets of concepts and different perspectives are leading up to creating an adequate way to represent the whole experience.

*INSERT CH. 6 from Fook, J. & Gardner, F. (2007)

<u>Practising Critical Reflection</u>

ii. Towards more systematic research of the critical reflection process

Underlying chapter 8 is a similar concern: the need to document the full range of benefits and outcomes claimed for critical reflection, but without an overarching framework to make sense of, and connect these with each other. The chapter is made up of a compilation of observations of changes made by our participants (pp. 131-136); a summary report on our own systematic evaluations of workshops (p. 137) (a full report of these results is included in the on-line resources which accompany the book); and also a review of literature regarding the benefits and outcomes of critical reflection (pp. 130-131 & 137-142). This chapter represents an attempt to lay a systematic foundation for further empirical research on critical reflection. Unfortunately there was not space to include the full results of the systematic analysis of evaluations, which involved about 400 responses. However although our analysis did not necessarily suggest anything different from claims about the benefits and outcomes of critical reflection already named in the literature, what it did do was provide: a better overview of the different types of outcomes; and a more detailed account of some of those changes. This in my view provides a much more rigorous basis from which to design further evaluations of the beneficial outcomes of critical reflection.

In summary, the results of the evaluation study indicated changes in four main categories to do with: rationality; the self and emotions; values; and practice. These categories provide an overview of the types of changes undergone in a critical reflection process, and in this sense, are an example of an attempt to draw together the many disparate aspects of the whole critical reflection experience.

The range of the types of changes suggests again the holistic and complex nature of experience, and how the different elements are

intertwined. These findings therefore provide a basis for further development of the research contribution of critical reflection.

*INSERT CH. 8 from Fook, J. & Gardner, F. (2007)

<u>**Practising Critical Reflection**</u>

Chapter 3

Towards a better understanding of social work practice

What has this work contributed to social work thinking, by devising an integrated framework for critical reflection? This section shows how my work in pulling together a more complex theoretical framework for critical reflection not only addresses some key social work themes, but also suggests some new directions in research methodology. This methodology may in fact contribute towards a better understanding of social work practice, so that new social work knowledge may be more directly derived from the experience of practice itself.

In chapter 1 I flagged my broad interest in linkages, and how for me, a distinctive social work knowledge needed to incorporate an ongoing concern with linking research and practice, particularly with developing research approaches and methods which might be more relevant to practice. In my earlier work I have developed the link between practice and research by first showing how a reflective approach might be applied to research practice (Fook, 1996), and in particular how different conceptions of practice research needed to be showcased. In later work I examined the concept of qualitative practitioner research (Fook, 2002a) and also approaches to theorizing from practice, and its role in research (Fook, 2002b). I continue to develop the relationship between research and practice with my newer interest in developing the critical reflection process as a method for better researching the complexities and holistic nature of practice. Not only does such a method offer better ways for representing practice in more valid ways, but it also develops the idea of research as a tool for creating more

relevant practice knowledge (and ultimately theory) directly from localized and contextualized experiences.

In this sense, my work on critical reflection allows me to make a broader contribution in research and practice terms. It allows me to make a contribution to these major ongoing issues which are a challenge for the academic discipline of social work.

As I suggested in the previous section, the results of my own studies demonstrated the broad range of changes which take place in the critical reflection process. This leads me to think about how and whether the critical reflection process itself might be used to research the many facets of practice experience, and in so doing, effectively intertwine practice and research. In this next section I outline in some detail, the basis for this new endeavour.

a. Future directions: critical reflection as a research method

In this final part I outline the newest aspect of my work, which is to develop my model of the critical reflection process as a method of researching professional practice experience. Please note that I have not fully developed all these arguments (as this would be too lengthy for the purposes of this thesis). My main intention here is to flag some broad ideas to indicate the future direction of my thinking. This direction is based on the conceptualization of the critical reflection process, (informed by many different theoretical perspectives), essentially understood as providing different ways to learn from experience. Experience is seen as complex, multi-perspectival, and needing to be understood in context. In this sense, I have equated practice and experience, that is, I am seeing practice as essentially an experience, which needs to be understood holistically and in context.

i. <u>The case for using critical reflection as a method to research practice experience</u>

Reflections on my experiences of the critical reflection process have led me to think more broadly about whether and how existing research methods have assisted practitioners in incorporating their experience into useful professional knowledge.

Over many years of conducting critical reflection with many different types of professionals I have been struck by the difficulty many people have in actually articulating their experience in a way which is meaningful to them. Often they present stories of incidents which have happened many years previously, and they are still stuck in trying to come to terms with this experience in a constructive way. Sometimes they are stuck because there were too many conflicting strands or perspectives, and they cannot sort through them or work out which is more important. In bending over backwards to be "fair" and "professional", they can often no longer recognise what is important to them. Sometimes they are unable to move on because of the strength of emotion associated with the experience. Often they feel stuck because what they experienced does not tally with what they think they should have felt or thought, or they cannot find adequate frameworks from their professional knowledge to make sense of what happened. In many cases, their self-confidence and image of themselves is undermined, as they cannot square what happened, and their own practice, with their own fundamental value or belief system. In short, their integrity feels questioned. (Many social workers for instance admit questioning whether they should continue in the profession).

What I also find in this process is that whilst it is helpful to simply tell a descriptive story about their experience, this is not enough. It is only the beginning of reflection. What is also needed is a choice of different theoretical frameworks to help the person interpret and see the experience in a variety of ways; some dialogue to help craft alternative views; and an enabling environment to try out radically different ideas. In evidence of this, I am repeatedly surprised by how the person's view of what their story was fundamentally about, can turn into something

quite different from what they originally said it was about. Even after reflecting further (only overnight in some cases), participants return to a second workshop, having completely reworked their idea of what their fundamental assumptions were. In finding the fundamental assumptions, people are also uncovering what is fundamentally important to them, and rediscovering their own value system and sense of self. They are, in a sense, rediscovering possibilities for preserving their own integrity.

I have begun to think that what the critical reflection process provides is a type of concentrated microcosm of the process people might (hopefully) normally go through in attempting to learn from experience. By this I mean that it is an intense process which provides the wherewithal to learn from experience using the means most of us would normally use if able, that is: access to different theoretical frameworks for new interpretations or perspectives; sympathetic other people (for example, friends, colleagues) with whom to dialogue; and an enabling environment to encourage the exploration of new ideas or interpretations.

So what starts as a reasonably straightforward process to "unearth assumptions" often ends up as a "making meaning of experience" in that participants not only learn form their experience, but are also able to reformulate more generic principles because of this (which function as a both a guide for professional practice but often also as general principles for living). This latter happens I think because the fundamental assumptions which are uncovered are so fundamental that they are part of a person's whole life philosophy, rather than simply being part of a professional theoretical framework. It is as if going to the heart of things allows people to re-engage with beliefs of fundamental importance, which then provides a cohesive bedrock of thinking for all of their life's activities. Of course there are also "therapeutic" aspects to this, in that people often feel emotionally unburdened, or able to accept aspects of other people or themselves that had proved problematic before. This is however to be expected if the "whole"

experience is addressed. Privileging these therapeutic aspects in some sense downplays the broader significance of the critical reflection change process. It is this broader significance which still cries out to be identified and understood.

However a number of concerns arise from my reflections…..

Whilst this all may sound quite positive however, several things disturbed me about these observations.

First, what happens if people are not able to make meaning of their experiences in this way? Presumably this means that many professionals struggle on, doubting their integrity, carrying a burden of unresolved emotions and concerns.

Second, how and why is it so easy for people to lose touch with their fundamental value and belief systems, so that they find it difficult to work out what is important? What was it about the workplace and professional cultures which enables this to happen?

Third, what is it about professional cultures which means that the theory and frameworks on offer can be so inadequate in helping professionals make meaning of their experience?

Lastly, how and why is it that people can so drastically change their understanding of their experiences after undertaking such a process? Obviously simply asking people to tell about their experiences is not enough to help them make meaning of them…clearly making meaning of experience has to be conducted in conducive conditions, and this is clearly something not available to quite a few professionals?

As a result of these questions, I began to speculate about whether critical reflection might be able to offer *a way of learning from experience (for individuals) but which could also be turned into a way of*

researching experience, so that the learning could become more transferable to other professionals. I felt that if there was a more systematic way to conduct critical reflection (in order to reach more systematically identifiable outcomes), then the collective learning from this might be used to develop professional knowledge, and also develop the distinctive contributions to knowledge made through professional practice itself.

In pursuing this issue, I first need to examine the broad ways in which critical reflection might be used in research, and particularly how these might compare to the possible contributions of existing research methods.

ii.   <u>How might critical reflection be more effective than current methods for researching professional practice experience?</u>

In this section I discuss the possible advantages of using critical reflection as a research method from three angles: the broad ways it might be used; the possible limitations of current methods; and how critical reflection might address these limitations.

A. Broad ways in which critical reflection might be used in research.

It is important to begin with an overview of the main ways that critical reflection might be used in research practice experience. There are three aspects which need to be considered:

First, it is crucial when using critical reflection to research practice, that the research questions are formulated in a way which is appropriate to the method itself. For example, if we are trying to gain a holistic understanding of practice, and critical reflection is particularly useful for recognising and pulling together disparate elements of experience, then the research questions need to be framed in these terms. eg. "what is the complex nature of practice experience (and what and how

are different elements integrated)?" Clearly, if we are arguing that critical reflection might address research problems in a new way, then some thought needs to be given to exactly what are the sorts of questions which a critical reflection method can investigate. Clearly this will, to some extent, depend on how critical reflection is theorised. In this sense, critical reflection is little different from many research methods, in that questions need to be framed in keeping with the framework on which the method is based.

Second, critical reflection might be used in a complementary way with other data collection, generation or analysis methodologies (for example, narrative methods; deconstruction; discourse analysis; grounded theory; other forms of pattern recognition; action research; co-operative inquiry; ethnographic methods; appreciative inquiry). It is important to understand what a critical reflection process can provide which other methods do not, so that they can be used in conjunction with each other.

Third, critical reflection might be used, not so much as a method for specific data collection or analysis, but as a segment of the research process designed to ensure that attention is paid to reflexivity issues.

B. Some of the limitations of existing methods.

Critical reflection also needs to be looked at in the light of what existing methods offer (or not) in terms of representing the complexity (and multi-perspectival nature) of experience. Some current major limitations of existing methods are encapsulated in the following issues.

One of the major issues with conventional research is that there can be a dominance of the researcher's perspective. (This for instance, is the criticism that spawned much of the qualitative perspective's concern to include the subjective perspective of the research participant (Denzin &

Lincoln, 1994). For example, methods like deconstruction or discourse analysis ultimately use the framework of the researcher to analyse/interpret/(implicitly judge) participants' experience/narratives

Conversely, there can be a dominance of the participant's perspective. For example, methods like narrative analysis or grounded theory run some risks inherent in "standpointism", that is, they may over-privilege the perspective of the participant. This is a potential problem because: 1/ there are possibly gaps between what people say and what they do, so that this does not give the entire picture; 2/ participants may not always be able to access the hidden or tacit (which may actually have major influence on their thinking, feelings and actions); 3/ it assumes that people can articulate, or are aware of, all influences or aspects of their experience (and that this doesn't change according to context); and 4/ it assumes there is a pre-existing set of labels (language) which accurately represents experience, and that everyone has access to this.

Validity issues are also an area of concern. For most research methods, there are limitations in representing experience accurately, because all methods are based on particular theoretical perspectives, and are therefore limited by the pre-existing frameworks used. For example, common data collection methods used in both positivist and post-positivist approaches (including interviews and observations) normally require both: 1/ a framework for selection and analysis of data (however weak or open-ended) which inevitably restricts capacity to represent experiences which might be new or not previously articulated; and 2/ a relatively specific (perhaps narrow) focus on some aspect of practice experience taken out of context (for example outcomes, beliefs, actions, decision-making). The complexity and contextual meaning of the whole experience is potentially lost, as well the dynamics of how the different aspects might interplay to create and develop each other.

Relevance issues form the last major area of concern. This relates to a major problem with much research, that is, that it is often difficult for

practitioners to translate research findings into meaningful change and action, in specific and concrete situations, particularly if the practitioners have not had a major role in designing or conducting the research. Practitioners may experience the lack of relevance of research for several reasons. For instance, they may not feel that their interests are represented in the research project - the research problem has not originated from them) – and as a consequence they do not feel they have any responsibility for acting upon it, and indeed, no sense of personal agency in acting upon it.

Alternatively, practitioners may feel that their experience is not represented in the findings of the research (for example, that the findings have been turned into a language with which they can't identify) and as a consequence they also feel little responsibility or agency for acting upon it.

Lastly, the research mat have been conceptualised and designed based on problematic assumptions for practitioners, that is, that a) the worlds of practice and research are separate, and b) the worlds of the "personal" and the "social" are separate.

C. How does critical reflection used as a research method potentially address these limitations?

Critical reflection provides an alternative approach to research, which might address these limitations, in three main ways: it is dialogic, integrative and transformative. These are explained following.

Critical reflection is **dialogic** in that it creates a <u>shared</u> representation of experience through a <u>dynamic interaction</u> between participant and researcher. The researcher and the participant have different roles which nevertheless interact to create a dynamic whole. The researcher's role involves facilitating reflection on the participant's experience through crafted use of different interpretive frameworks. The

participant' role involves providing the basic data of their experience and crafting a meaning of experience using different frameworks in discussion with the researcher. In this sense both the researcher and the participant are "co-researchers". This type of dialogic process (with jointly crafted input from both parties (or several parties if the critical reflection takes place in a group) effectively means that both "personal" and "social" views are represented. An outcome of this dialogue is that the participant is able to speak about their experience in a language devised through dialogue, but which nonetheless represents their own view.

Critical reflection is also **integrative** in that it provides a framework and process for integrating all aspects of complex experience (emotions, values, actions) by articulating its meaning in context, and representing it by creating relevant language. The complexity of experience is preserved and represented, in a holistic way, in relation to its context. This effectively means that the "uniqueness" of the experience is respected, but by finding a relevant language for it, it is able to be communicated about (modified and developed) with other people in social context. In this sense also, both the personal and social aspects of experience are preserved.

Lastly, critical reflection is also potentially **transformative**. It can be transformative because the research origins, process and findings are experienced as relevant. This means that the process of learning about experience provides a basis for practitioners to take further action because it: 1/ directly links research with personal learning and change possibilities; 2/ directly links an understanding of the personal and social which provides a sense of personal agency in social context; and 3/ reaffirms the value of practice experience and creates a legitimate role for the practitioner as researcher.

It is in these final three aspects that I establish the broad principles of a critical reflection process which would allow it to be used as a method

for researching the complexity, contextuality and holism of professional practice experience. In allowing us to represent experience in these ways, it also provides an integrating framework which draws disparate aspects of experience to be brought together in a meaningful way.

b. An integrated framework for critical reflection and its contribution to a distinctive social work knowledge

How does an integrated framework for critical reflection, as outlined in this thesis, contribute to developing my distinctive contribution to social work?

In the background to this work I spoke of the broad principles which underpinned my approach to social work, and the need to develop distinctive social work knowledge based on these principles. In summary these were primarily about making connections:

- between the individual and society
- between theory and practice, and
- between research and practice

These are embedded with a holistic, integrative and inclusive approach to understanding the complexity of human experience in social context.

How have each of these principles been addressed by the model of critical reflection I have developed in this thesis?

First, an understanding of the individual in social context is integral to the concept of critical reflection I have outlined, and provides a broad framework from which to interpret fundamental assumptions which are unearthed through a critical reflection process. It also provides a framework for explaining how some of these fundamental assumptions have such power in maintaining a person's social place and position.

In a related way, the critical reflection process also allows an individual person to become more empowered to act in social context, and derive a sense of personal agency in social context (see Fook & Askeland, 2006).

Second, the model of critical reflection I have outlined is a clear demonstration of theory being linked with practice, in that I have developed a concrete process for practising critical reflection, based on clearly articulated theoretical frameworks or concepts (reflective practice, reflexivity, postmodernism and critical social theory). In addition I have provided a clear process for practising critical reflection based on learning from experience frameworks.

Third, research and practice are linked, in that I have developed a process which may be used to research practice, so that the two do not always have to be seen or practised as separate activities.

The issues of holism, integration, inclusion and complexity, within which these principles are embedded, have been addressed in the following ways.

First, the model of critical reflection I have developed allows individual practitioners to plumb the many different layers of their experience, and how its meaning is intertwined with past experiences, and past and current contexts. This allows for changes in experiences and their interpretation to be accommodated in an overarching fashion, and reintegrated with current experience. In this way the complexity of experience is addressed, as well as the contextual nature of experience.

Second, using learning from experience as a broad framework for the critical reflection process allows complex experiences to be integrated with a sense of self and fundamental value systems. Complex experiences may also function as integrative experiences.

The model for practising critical reflection incorporates intellectual, emotional, social and action elements. In this sense it is holistic, and allows learners to see how different facets of who they are may be intertwined, allowing actions which are more congruent with their own experience, meanings, and sense of self.

The model is also inclusive, in that many differing perspectives are included, allowing a flow of different approaches and interpretations to be applied in ways which might be meaningful for different people and situations.

In summary then, the work explicated in this thesis demonstrates how I have developed a model of critical reflection, using a number of frameworks to illuminate both the theory and practice of it. These frameworks incorporate strategies for unearthing fundamental assumptions from a person's own experience; which in turn function to connect their understanding of themselves in social context; which then in turn both empowers them to act, as well as to frame new guidelines for action. Overall they are engaged in learning from their experience and creating knowledge from it. This process therefore may be seen as a way of learning from experience and simultaneously a way of researching experience, in that new knowledge about practice may be directly created from the process of learning from it.

The process is integrative, in that it combines different theoretical perspectives, but also integrates practice, learning and research. It is holistic, in that it allows a fuller and less fragmented understanding of experience to be represented. In this way it also does justice to the complexity of experience.

The contribution of an integrated model of critical reflection to social work is a model which, based on fundamental social work principles, allows learning from experience, combined with research on practice, to create new knowledge for professional practice. It is a model which

resonates with the basic principles of social work, but which also has relevance for all professional practice which seeks to be socially just, holistic and contextual.

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