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LEARNING AFTER DOWNSIZING: A CASE STUDY ON LAYOFF SURVIVORS IN A  
DOWNSIZED ORGANIZATION

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LEARNING AFTER DOWNSIZING: A CASE STUDY ON LAYOFF SURVIVORS IN A  
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## **Dedication**

*“The beautiful thing about learning is that no one can take it away from you.”*

*- B.B. King*

To my mother, who consistently reminds me that out of all things in life, my education can never  
be taken away from me.

To my father, who has always believed in my abilities and supported me in all that I do.

To my husband, who has been with me on this journey when it began at the community college.

He is my constant source of strength and light of my whole world.

To my family, I am forever thankful for the unconditional love and support you all have  
provided me through this long journey.

To the women who are First Generation College students in their family, go get that PhD!

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## **Abstract**

Organizational downsizing is a strategy that many companies use to save money and implement change. However, research suggests that organizations often lack the benefits they expect from downsizing due to the challenges the remaining employees, namely the layoff survivors, experience. One of the major challenges is that research shows that downsizing negatively impacts the learning and that gaps within learning networks are created. Yet, there is no current research on how layoff survivors learn in a downsized environment. This qualitative case study explored the stories of 10 layoff survivors who had just recently experienced a downsizing in one organization. This particular organization was selected as a result of their history of downsizing and the fact that they had experienced a downsizing within the last year before this study was conducted. A model of informal learning underpinned this study in order to fully understand the learning process of layoff survivors. Throughout semi-structured interviews, layoff survivors shared the events that triggered their learning, the learning strategies they used, and the lessons they learned throughout this experience. The major findings of this study suggest that layoff survivors do engage in informal learning through modes of self-directed learning and incidental learning. The triggers for learning include a lack of time, reallocation of work, and a loss of their learning networks. Layoff survivors shared that self-directed learning and high-level learning were learning strategies they used, and that throughout this process, it taught them to be responsible for their self, as well as more efficient in the way they learned and worked. Individual factors seemed to facilitate learning, while organizational factors inhibited it. Findings suggest that organizational factors such as having no learning culture, changes within management, and a lack of strategy and direction all inhibited learning from occurring. Findings also suggest individual factors, such as self-interest and emotions, facilitated and inhibited

learning from occurring. Overall, the learning process for layoff survivors in a downsized organization is a complex process.

*Keywords:* Workplace learning, organizational change, downsizing, layoff survivors, informal learning

## CHAPTER ONE: INTRODUCTION

The energy sector is currently experiencing many changes in their organizations, particularly due to the downturn of oil prices and the impact that the Covid-19 pandemic has had on the industry (Camp, Mead, Reed, Sitter, & Wasilewski, 2020). One of the most significant changes that is occurring within these organizations is downsizing (Dickson, Tilghman, Bonny, Hardin, & Mittal, 2020; Kell, 2015). This chapter will introduce this phenomenon through a discussion of organizational downsizing and its issues, as well as the impact it has on layoff survivors and workplace learning, and the interventions that have already been explored in efforts to help mitigate downsizing issues. It will address the problem statement, the purpose of the research, as well as the research questions guiding the study. This chapter will conclude with an explanation for the significance of this study and definitions of key terms.

### **The Volatile Energy Industry**

In order to understand why the energy industry often utilizes downsizing as a strategy to implement change in the company, it is first important to understand the risk factors and trends this industry faces. The energy sector spans across global markets, impacting all countries and environments (Dickson et al., 2020; Lloyd, 2014). Among many risk factors, it faces rapid changes and international economic pricing. A particular risk factor is that of economic pricing (Dickson et al., 2020; Lloyd, 2014). When energy prices are trending upwards in the market, this typically correlates with demand of energy products being higher. As a result, energy companies seek out financial opportunities to cash in on the higher pricing of products, which means money is spent at a rapid pace, hiring more employees rapidly increases, and growing the company becomes a new goal. However, historical trends show that these high prices are short lived (Dickson et al., 2020). As a result of more companies pumping energy products out of the

ground, an oversupply gets created, which then results in a decline in pricing. When this occurs, energy companies turn to quick organizational change strategies to conserve their profit. This typically results in the company choosing to downsize their workforce and lay off a portion of their employees (Dickson et al., 2020; Lloyd, 2014). As it appears now, the energy industry will always be reliant upon economic changes, so it is easy to see why energy companies are prone to organizational changes, particularly downsizing. Thus, the importance of this study on an energy company who has recently gone through a downsizing was conducted.

### **Organizational Downsizing Causes, Driving Factors, and Definitions**

Organizational downsizing is a strategy that organizations have used for the last several decades in order to align their company with their long-term goals (Applebaum, Close, & Klasa, 1999; Davis, Savage, & Stewart, 2003; Hornstein, 2009; Smith, 2002; Vahtera, Kivimaki, & Pentti, 1997). The research on downsizing is substantial and emerged primarily in the 1980s, as a result of the prevalence in which organizations were utilizing this strategy to redesign, reduce, or realign their organizations (Cameron, 1994; Cameron, Freeman, & Mishra, 1991; Cascio, 1993; Farrell & Mavondo, 2004; Whetten, 1980). This research shows that downsizing has proven to have a wide range of causes and driving forces behind organization's decisions to utilize it as a strategic initiative (see e.g., Gandolfi & Hansson, 2011). Some of these are cost reduction goals (Radcliffe, Campbell, & Fogarty, 2001), failures within the organization to adapt to changing technology and skills (Mellahi & Wilkinson, 2004), and/or reactions to times of crisis or external factors or global competition (Mirabal & DeYoung, 2005). While downsizing was once viewed as an indicator of poor financial health of an organization, it has now become a popular strategy in organizations anytime the economy forces an organization to reevaluate how they are doing business (Hornstein, 2009; Reynolds-Fisher & White, 2000). This can be due to market

conditions, or pressure to remain competitive in an ever-changing environment (Murphy, 1999; Neves, 2011). Reynolds-Fisher and White (2000) state that downsizing is often used to establish a leaner organization, even if the organization is not struggling financially. For some organizations, the primary goal is to keep the organization's administrative costs down in order to maximize their profits (Kulkarni, 2008). Cascio (1993) states the objectives that organizations hope to accomplish by deciding to downsize. These are "lower overhead, smoother communications, less bureaucracy, greater entrepreneurship, faster decision making, and increases in productivity" (Cascio, 1993, p. 97). While these are the objectives that organizations wish to achieve, some of the other causes for having to downsize include the following: "an organization acquiring another organization, merging with another organization, a "quick fix" to prevent closure or bankruptcy, to prepare for privatization, or to reduce costs to remain competitive in an increasingly global market" (Labib & Appelbaum, 1994, p. 61). Gilmore (1993) states, "Spurred by increasing worldwide competition and shareholder pressure to boost earnings, many companies are focused on improving productivity and quality while reducing expenses" (p. 43). Thus, while a main goal of organizational downsizing is usually to reduce costs, it is also to improve efficiency and productivity.

Most recently, the energy industry was significantly impacted by the COVID-19 pandemic (Camp et al., 2020). As a result of this virus spreading across the globe, many countries went on lockdowns, which resulted in the demand for oil and gas products to decline rapidly and created an abundance of oversupply (Camp et al., 2020). As a result, energy companies began laying off employees at a historically rapid pace in fear of the unknown of oil prices and not knowing when they would recover. This worldwide pandemic is just another case that shows that when organizations experience a financial burden, the first option they resort to is

downsizing their company. This pandemic has also shown just how quickly organizations react to changes in the economy and provides a real case scenario on another cause of downsizing, which can be global issues. As a result, it could be argued that sometimes organizations choose to downsize with no long-term goal in mind, but rather just as a quick fix for their company in an effort to get by with a current situation that is out of their control.

### **Issues, Symptoms, and After Effects of Organizational Downsizing**

Whether downsizing occurs for increased productivity goals, or reduction in costs, it inevitably impacts the work processes and results in work redesign (Cameron, 1998). Furthermore, while downsizing is supposed to help sustain the organization in order to ensure long-term success, there are many issues that occur after the downsizing has taken place. In fact, research shows that the outcomes of downsizing can create social and financial issues (Gandolfi, 2014). Some of these issues include the failure to reduce costs, negative performance outcomes, and decrease in commitment from employees (Cameron, 1994; Cascio, 1991, 1993; Greenhalgh, 1983; Zatzick & Iverson, 2006). Therefore, because there are employees involved and downsizings create emotional turmoil, the efficiency and productivity that the organization seeks is not always experienced after the downsizing. This is particularly due to the ineffective handling of the employees who survived the layoffs (Kulkarni, 2008). In fact, over the last two decades, research has consistently shown that organizations do not usually reach the full benefits of downsizing (Burke, 2005; Hornstein, 2009; Sadri, 1996). Sadri (1996) states that at least half of the organizations that have downsized their organization have not experienced the benefits they intended to. Burke (2005) also indicates the same stating, “Organizational restructuring and downsizing are a complex and difficult task. A small but growing literature suggests that such changes fail to reach their objectives (usually financial) about half the time” (p. 21). Hornstein

(2009) also argues that organizations that choose to downsize have a fifty percent chance of actually seeing the benefits from downsizing and that it is likely that the downsizing itself will cost more than it is worth. This is usually blamed on the issues that occur internally after a downsizing (Hornstein, 2009).

### **Layoff Survivors**

Many scholars have focused on the negative outcomes and issues of the employees who survive the downsizing and remain employed by the company, who have also been coined layoff survivors (e.g. Allen, Freeman, Russell, Reizenstein, & Rentz, 2001; Appelbaum & Donia, 2001; Brockner, 1988a; 1988b; 1992; 1995; Brockner, Grover, Reed, DeWitt, & O'Malley, 1987; Brockner, Weisenfeld, Reed, Grover, & Martin, 1993; Cascio, 1993; Hornstein, 2009; Mollica & Gray, 2001; Noer, 1993; O'Neill & Lenn, 1995; Sadri, 1996; Shah, 2000; Weakland, 2001). This is not to be confused with employees who have been laid off by the company, as literature in this field refers to the employees who remain at the company after a downsizing as layoff survivors. According to research, layoff survivors experience many emotions after a downsizing, which include anxiety and fear over what it means for their job, distrust or anger in management for their decision to downsize, and survivor guilt and grief over the loss of coworkers and friends (Brockner & Wiesenfeld, 1993; Leana & Feldman, 1989; Noer, 1993). Noer (1993) refers to these emotions as layoff survivor sickness, stating that these emotions can cause an emotional blockage in employees, which as a result impacts their performance, as well as the organization's performance. Thus, the after effects of organizational downsizing are highly impacted by the layoff survivors and their emotions and feelings toward the organization (Liu & Perrewé, 2005). Some of these specific effects include decrease in employee morale and commitment (Atwood, Coke, Cooper, & Loria, 1995; Kivimaki, Vahtera, Pentti, & Ferrie, 2000; Makawatsakul &

Kleiner, 2003; Rice & Dreilinger, 1991; Wagar, 2001), decrease in trust and loyalty to the organization (Atwood, Coke, Cooper, & Loria, 1995; Peak, 1996; Rice & Dreilinger, 1991), decrease in productivity (Rice & Dreilinger, 1991; Wager, 2001), decrease in creativity and innovation (Amabile & Kramer, 2011; Shah, 2000;), excessive cautiousness in doing one's job (Rice & Dreilinger, 1991) and increase in tardiness and absenteeism (Sadri, 1996).

**Layoff Survivor Sickness.** Within the literature of layoff survivors, the term “survivor syndrome” has been coined (Noer, 1993). According to Noer (1993), this syndrome is “a set of attitudes, feelings and perceptions that occur in employees who remain in organizational systems following involuntary employee reductions” (p. 13). In conjunction with the feelings that layoff survivors have as mentioned, such as guilt, anxiety, fear, and depression, they also experience this syndrome that results from a break in the psychological contract between the employee and the organization, a feeling of unfairness by management to conduct the layoffs, and a lack of an organization having a vision going forward (Noer, 1993; Sahdev, 2004). This syndrome first impacts employees' productivity, but eventually flows into the productivity of the organization (Sahdev, 2004). It decreases employees' work efforts and their willingness to adapt, increases their likelihood to leave, and increases their resistance to change. Armstrong-Strassen (1998) also mentions that the attitudes and behavior of the remaining employees will significantly determine the effectiveness of the changes in the organization after a downsizing and as Meyer, Srinivas, Lal, and Topolnytsky (2007) point out, in order for change initiatives to be successful, employees must be willing to adapt their work behaviors in ways that are conducive to the changes being implemented.

### **Negative Learning Impact**

Hornstein (2009), Reynolds-Fisher and White (2000), and Susskind, Miller, and Johnson (1998) suggest that another major problem that occurs after a downsizing is the negative impact it has on learning in the organization and the disruption in the established network of employees that it causes. Hornstein (2009) states,

Downsizing has a negative effect on corporate memory and employee morale, disrupts social networks, causes a loss of knowledge, and disrupts learning networks. As a result, downsizing risks handicapping and damaging the learning capacity of organizations.

(para. 7)

This is due to the loss of informal networks that have been built within the organization and the loss of knowledgeable employees who were able to help other employees do their job better (Reynolds-Fisher & White, 2000; Susskind, Miller, & Johnson, 1998). Susskind, Miller, and Johnson (1998) refer to this as structural holes that “exist in a network where links to unique sources of information or resources are not present” (p. 31). These structural holes can create chaos in the organization among the employees who are experiencing it, which can lead to resistance of changes being implemented, as well as a decrease in motivation to learn (Reynolds-Fisher & White, 2000; Susskind, Miller, & Johnson, 1998).

### **Strained Relationships Between Layoff Survivors**

Due to an organization’s decision to downsize a company, employees who remain after the downsizing are often faced with not only the internal emotions that they feel and the stress that increases with their workload (Sadri, 1996), but also the strain that sometimes occurs between their relationships with coworkers or managers after the downsizing takes place (Grunberg, Moore, & Greenberg, 2006; Molinsky & Margolis, 2006). Front line managers are often caught in the middle of having to let go of their employees, which can result in them

withdrawing from the remaining employees after the downsizing and not supporting or providing direction that their employees need from them as managers (Grunberg, Moore, & Greenberg, 2006). Furthermore, when the downsizing forces changes in management and restructuring of departments, such as moving managers around, layoff survivors can sometimes become frustrated with their new managers who have been chosen to manage the department and decide not to cooperate with the changes (Susskind, Miller, & Johnson, 1998). Layoff survivors may also have their own opinions about who they feel should have been let go instead of someone they felt should have kept their job, which can result in retaliation against those remaining employees, or lack of communication or cooperation with them (Brockner, 1992). Overall, these factors can place strain between the layoff survivors, which in turn can negatively impact the productivity and changes that the organization is trying to achieve.

### **Emotional Impacts and Processes of Layoff Survivors**

As a result of the work that researchers have done on how emotions impact workplace learning (see e.g. Scherer & Tran, 2001; Sylwester, 1994; Vince, 2001; 2002), it is understood how complex individual's emotions can be and how those emotions impact their behavior. It is also clear through the abundance of research that has been conducted on layoff survivors and their experience after a downsizing, that they experience many negative emotions as a result of downsizing (Noer, 1993). These emotions can cause employees to lack in their performance at work, which ultimately affects the bottom line of an organization (Susskind et al., 2007). They can cause lack of motivation to learn new tasks and decrease engagement with one's work (Scherer & Tran, 2001). On the other hand, positive emotions ignite energy that motivates employees to grow in their learning and development at work (Scherer & Tran, 2001); however, it is hard to find literature regarding positive emotions after a downsizing. Emotions are an

important factor to consider in layoff survivors because emotions are involved in the various learning processes that take place among employees in an organization (Scherer & Tran, 2001). Vince (2001) states that, “learning primarily occurs in the context of social relations and as a result of complex interactions, which are profoundly influenced by both individual and collective emotions” (p. 5). Thus, emotions do not only affect the individual who is experiencing them, but it also effects the social interaction with others, resulting in an impact of sharing or creating knowledge. Scherer and Tran (2001) also argue that emotions impact an individual’s desire and readiness to learn, as well as their ability to store new knowledge that they find interesting. If an individual is disinterested or has a negative perception regarding something, they will not be as motivated to learn and will not put much effort into learning (Scherer & Tran, 2001); thus, hindering the learning that occurs after a downsizing.

### **Organizational Evaluations Used to Address Downsizing/Learning Issues**

Kulkarni (2008) argues that, “handling the survivors would be the matter of utmost importance to realize the benefits of downsizing” (p. 249). In other words, organizations should consider the needs of layoff survivors after a downsizing, particularly regarding the emotional impact that downsizing has on survivors. In doing so, the organization can then potentially realize the benefits of downsizing. As a result of the abundance of research that has been conducted on analyzing layoff survivors and ‘survivor syndrome’, researchers have prescribed and suggested ways that organizations can help minimize the negative impact of downsizing and the impact it has on the survivors through providing them with what they need. Because the research shows that layoff survivors often feel mistrust and anger with management, anxiety and fear over the future of their job, and guilt and grief over the loss of their coworkers, many researchers suggest factors that would help mitigate these feelings. Thornhill, Saunders, and

Stead (1997) state that this includes, fairness and perceived justice towards the layoff victims, open and honest communication that allows involvement in the next phases of the organization, demonstration of buy in and commitment to the organizational changes from upper management, and a clear vision that demonstrates the intentions of the organization's future direction. Marks and Mirvis (1992) and Sahdev (2004) also agree that communication is an important factor in the post downsizing environment. Employees will be uncertain about what this means for their job and the future of the company, so clearly defining and communicating to them the next goals for the organization may help to alleviate the stress, anxiety, and uncertainty that layoff survivors often experience. Sahdev (2004) specifically mentions that it is important to consider the survivors and provide communication and support through the process because they are the ones who will be heavily involved with the implementation of the changes. Other studies have shown that training and good employee assistance programs have helped reduce the negative impact that downsizing has on survivors (Amundson, Borgen, Jordan, & Erlebach, 2004; Roan, Lafferty, & Loudon, 2002; Tzafirir, Mano-Negrin, Harel, & Rom-Nagy, 2006).

Tsai, Yen, Huang, and Huang (2007) argue that because layoff survivors lose their trust in the downsized organization, they are "reluctant to learn further in order to improve their skill base" (p. 158), which then further impacts an organization's daily functions. In Tsai, Yen, Huang, and Huang's (2007) study, they focus on the job satisfaction of remaining employees and the influence that had on their learning commitment and found that family relationships and interpersonal relationships with colleagues were two important and positive factors that contributed to their learning commitment after a downsizing. Thus, they argue that organizations that pay attention to the layoff survivors' relationships with their colleagues and their families would experience an increase in learning commitment from the employees.

In a study that Cameron (1994) conducted on 30 organizations experiencing a downsizing, she found that most of the organizations did not show an improvement in performance over the four years of the study. The five organizations in the study that were considered the 'high performing' organizations were then used to help prescribe best practices in downsizing. Based on her findings, Cameron (1994) suggests that successful downsizes should include "employee involvement, teamwork, communication and information sharing, appraising, training, articulating a vision, and administering downsizing in a trustworthy and fair manner" (p. 210). Cameron (1994) further concludes that in order for organizations to be successful, they must approach downsizing as a long term strategy and see employees as assets, look at downsizing as a means of improvement and not just for times of crisis, prepare for downsizing by identifying the vision and future of the organization, involve employees in the changes, involve leaders and make sure they are visible throughout the changes, keep communication open, pay attention to survivors just as much as those who are leaving the organization and provide them with equal support, provide training and cross training, help employees to learn how to adapt after the downsizing, provide opportunities for personal growth and development, among many other ideas. The common theme that is included in the suggestions provided by Cameron (1994) is that they all focus on the survivors that remain after the downsizing. Appelbaum, Delage, Labib, and Gault (1997) also agree that organizations must focus on the survivors in a strategic manner in order to increase productivity. Other scholars agree that in order to be successful in downsizing, layoff survivors must be felt taken care of by the employer and paid attention to (see e.g., Cameron, 1994; Cascio, 1993, 2002; Chadwick, Hunter, & Watson, 2004; Naumann, Bies, & Martin, 1995). Based on the research that has been done that demonstrates the emotional impact that downsizing has on survivors, Kulkarni (2008) argues that

organizations should pay attention to what survivors' needs are and that "handling the survivors would be the matter of utmost importance to realize the benefits of downsizing" (p. 249). In doing so, the organization can then potentially realize the benefits of downsizing.

Furthermore, other research that has been conducted on layoff survivors in order to try and address the issues they experience after a downsizing are revolved around organization justice theory, which focuses on the ways in which survivors feel their coworkers who were laid off, were treated. This research has found that merit based layoffs do not affect productivity as much as random layoffs (Brockner, Davy, & Carter, 1985; Brockner, Wiesenfeld, & Martin, 1995), the level of compensation in severance packages can help mitigate survivors feelings of guilt (Brockner, Grover, Reed, DeWitt, & O'Malley, 1987), and prior commitment and social influence also affect the reactions of survivors (Brockner, Grover, O'Malley, Reed, & Glynn, 1993). Hence, these findings demonstrate the need for considering layoff survivors' needs, not only after a downsizing occurs, but also during the decision and planning of a downsize.

### **Problem Statement**

As demonstrated, there is an abundance of research that has been conducted on layoff survivors and the negative learning impacts created as a result of downsizing. Yet, research lacks any thorough discussion concerning what learning looks like, or how layoff survivors learn after a downsizing. For instance, Reynolds-Fisher and White (2000) argue the serious damage that downsizing has on the learning capacity of an organization in terms of the informal and formal networks that have been created within the organization; however, their framework focuses on the selection process prior to downsizing and ways to mitigate losing knowledgeable employees when downsizing, rather than focusing on what takes place in regards to learning after downsizing. This should be noted because it may not be practical for organizations to consider

knowledgeable employees compared to other employees when downsizing, especially if the organization is trying to cut back on higher salaried employees, in which case knowledgeable employees would most likely be the higher paid employees. Furthermore, Farrell and Mavondo (2003) also argue that the learning orientation in organizations that decide to downsize are affected negatively; however, their study focuses on organizations who choose to downsize as a strategy to improve the learning within the organization, and they propose alternatives to downsizing in order to improve the learning orientation. Their study does not address the learning orientation that occurs as a result of an inevitable downsizing. This research that has been conducted on learning and downsizing appears to only focus on how to mitigate the loss of learning prior to downsizing, but it does not address the learning that occurs after the downsizing. Even with the knowledge researchers have regarding the emotions of layoff survivors, the decrease in productivity and motivation that occurs after a downsizing, and the impact emotions can have on learning, research has yet to understand how layoff survivors are learning after going through a downsizing.

Overall, only a few studies have looked at what learning looks like after a downsizing. For instance, Carbery and Garavan (2005) have explored how layoff survivors, particularly managers, cope with the transition after a downsizing, and looked at their motivation and willingness to learn in a more non-formal setting. They found that within the organization they studied, survivors were left to take responsibility of their own learning and were not provided with learning opportunities from the organization. The risk that Carbery and Garavan (2005) state this poses is forcing survivors into learners and non-learners because those who are likely to take control of their own learning are those who have clear direction of where the company is headed (those in management) and those who have actively engaged in their own self

development and learning in the past. This, however, does not address the issue of lower level employees and those who have not engaged in self-development in the past. While this research addresses important components to learning that occurs after a downsizing and provides helpful knowledge on how employees may participate in learning after a downsizing, the component of emotions and how that impacts learning behaviors in a downsized environment is still not addressed in their study.

The breadth of information that has been provided on layoff survivors' behaviors after a downsizing is important to consider when trying to understand the learning processes that will occur after a downsizing. One of the components of organizations remaining successful and being able to adapt to changes in the fast-moving environment is the ability to maintain a learning network and learning capacity within their organization (Argote, 2011; Dodgson, 1993; Murphy, 1999; Neves, 2011). However, as research has shown, downsizing being utilized as another strategy to help organizations remain profitable and competitive can negatively impact the learning that takes place in the organization (Carbery & Garavan, 2005; Farrell & Mavondo, 2003; Reynolds-Fisher & White, 2000; Tsai, Yen, Huang, & Huang, 2007); therefore, ultimately counteracting any progress that may have been made in terms of learning taking place within the organization. What is important to consider then, is how organizations can ensure that learning continues to take place after the downsizing occurs. Since it is known that organizations will be dealing with employees who have many negative emotions concerning the downsizing, and these same employees play a large role in the workplace learning (Schein, 1985), I argue that it is essential to consider how layoff survivors learn after an organizational downsizing. Research shows so much about how emotions impact learning behaviors, both positively and negatively, and it is not uncommon for layoff survivors to experience all sorts of emotion as a result of a

downsizing. Research also shows that learning is impacted in various ways after a downsizing, yet very little is discussed about the learning that takes place among layoff survivors post-downsize. Very little is also known about what learning in an organization that has recently downsized actually looks like; this is important to understand because as research has pointed out, the disadvantages to downsizing often outweigh the advantages (Hornstein, 2009) and layoff survivors play a major part in the changes that take place in a downsized environment (Smith, 2011; Stanleigh, 2008).

### **Purpose Statement**

Research shows that employees experience various emotions throughout organizational changes (George & Jones, 2001; Vince & Broussine, 1996), that both positive and negative emotions impact workplace learning (Scherer & Tran, 2001; Vince, 2002), and that workplace learning is important to organizational change (Argyris, 1993), yet research lacks the explanation of how layoff survivors participate in learning after a downsizing. Particularly, research specifically lacks the exploration of how layoff survivors engage in informal learning after a downsizing.

Therefore, the purpose of this case study was to examine how informal learning occurs in a downsized organization. In exploring the informal learning that takes place among layoff survivors after a downsizing, as well as the factors that facilitated or inhibited that process, it is hoped that deeper insight into workplace learning in the context of downsizing will be illuminated and that our understanding of how learning can occur after a downsizing will be strengthened. The research questions that guided this study are:

1. How do layoff survivors engage in informal learning within the context of downsizing?

- 1a. What are the triggers that initiate the informal learning process?
- 1b. What are the learning strategies that are used?
- 1c. What are the lessons learned?
2. What are the factors that facilitate or inhibit learning in a downsized organization?
  - 2a. What organizational factors support or inhibit learning?
  - 2b. What individual factors support or inhibit learning?

By exploring these questions through a case study methodology, researchers will be able to gain new insight into the learning of layoff survivors after a downsizing, as well as the factors that may or may not have contributed to that learning.

### **Significance of Study**

Many industries consistently face challenges and change due to the ever-changing economy (Kell, 2015; Lloyd, 2014). In recent years, the energy sector in particular has been faced with the downturn of economic pricing of oil (Lloyd, 2014). Most recently, the slowdown of the economy as a result of the COVID-19 pandemic led to a collapse in demand for oil and gas products, which led to a total collapse in oil prices (Dickson et al., 2020). These events have required energy companies to restructure, reorganize, or downsize their organizations in order to realign their balance sheets with a smaller budget in order to preserve their profits and withstand the downturn and economic challenges. One specific way energy companies are choosing to do this is through downsizing their organizations through layoffs. As of July 2016, 195,415 jobs had been cut within the energy industry since mid-2014 (Challenger, Gray, & Christmas, 2016). Between the months of March 2020 and August 2020, an estimated 107,000 energy jobs were lost due to the COVID-19 pandemic (Dickson et al., 2020). The strategy of downsizing is not new to this industry or other industries; as oil prices continue to fluctuate over the years and the

economy adjusts to life after the pandemic, energy companies will continue to be forced to make decisions that affect not only those employees who lose their jobs, but also the employees who remain employed by the company after a downsizing. With several thousand jobs cut, the organizations then place their needs on the employees who remain with the organization, which usually means a heavier workload on the remaining employees. This then results in employees feeling overworked, overwhelmed, and stressed about changes that are being made in the organization (Sadri, 1996). In conjunction with downsizing, energy companies are also constantly looking at other ways to remain competitive and strengthen their capability to adapt to constant changes; Lloyd (2014) states that one way energy companies can remain successful in the very competitive and constantly changing industry is by encompassing a learning culture. However, as noted, the downsizing that is taking place is counterintuitive to such an endeavor.

As research has shown, downsizing has been a strategic initiative that organizations have used for the last several decades. As mentioned, it is a strategy being implemented by organizations who are currently experiencing organizational decline due to external market factors, such as the energy industry (Kell, 2015; Lloyd, 2014). While energy companies are trying to remain profitable by downsizing their organization, they are also creating major structural holes in their organization by letting go of employees who have been with the company or in the industry for a long time. They are also dealing with layoff survivors who are now being loaded up with more work, while facing the stresses and emotions of their coworkers losing their jobs and the uncertainty of what it means for their future with the organization. While there have been many theoretical perspectives proposed regarding how to handle and mitigate issues of layoff survivor syndrome, these perspectives fail to address the learning aspect of organizations after downsizing. Research has not sufficiently explored the learning that occurs

after a downsizing as it relates to layoff survivor sickness, or rather the layoff survivors' emotions. Research shows the impact that both positive and negative emotions have on learning behaviors (Scherer & Tran, 2001; Vince, 2002); therefore, considering the emotions of layoff survivors is significant in terms of understanding the learning they do or do not participate in after the downsizing. Hence, the purpose of this study is to explore how layoff survivors participate in informal learning after a downsizing. Studies that consider these aspects of downsizing are important in order for organizations to understand how to support layoff survivors in the learning that will occur after the downsizing. With the increasing fast-moving environment, where organizations are constantly looking for ways to improve competitiveness and innovation, learning is an important factor in the organization (Dodgson, 1993; Neves, 2011). But how can organizations maintain their learning capacity within a recently downsized organization with the layoff survivors who are still employed? This is a question that is not fully understood in the literature as of yet.

Although the research on downsizing is abundant, because of the knowledge of the likelihood that organizations will not be successful after downsizing, it is important to consider a component of downsizing that research has yet to explore. By doing so, it is possible that new perspectives of what layoff survivors need in terms of their learning processes after a downsizing takes place may be brought forth. Understanding how layoff survivors learn after downsizing, will allow new information on how organizations can better understand how to support and serve the survivors. By supporting the survivors, organizations can strive to keep their learning capacity intact and fulfill the learning gaps that may occur as a result of their downsizing. Because of the amount of research that has been conducted on downsizing and the knowledge that they oftentimes do not work, it is important to understand every component regarding the

phenomenon in order to provide new and other ways of helping organizations truly benefit from the downsizing.

## **Definitions of Key Terms**

### **Downsizing**

In an effort to understand the different causes of downsizing, various definitions have emerged. Here, we describe the definitions that will ultimately be the definitions of downsizing in this study due to the broad notion of downsizing that these definitions capture. Cameron (1994) defines downsizing as, “a set of activities, undertaken on the part of the management of an organization and designed to improve organizational efficiency, productivity, and/or competitiveness” (p. 192). Cascio (1993) describes downsizing as “the planned eliminations of positions or jobs” (p. 95); thus, to Cascio (1993), the downsizing is not primarily for increasing organizational performance, but rather to simply reduce the workforce. In other words, it is used to decrease payroll and administrative costs, as well as align the workforce with the level of work that the organization needs and to decrease the possible redundancy that is taking place among worker’s roles (Vahterra, Kivimaki, & Pentti, 1997). For purposes of this research study, both definitions apply.

### **Informal Learning**

A broad range of definitions exists for informal learning; thus there are many ways to describe it. However, the main concepts of informal learning that need to be understood are the facts that informal learning is the opposite of formal learning and anyone can participate in it, even if they do not realize it. In other words, informal learning does not have to occur in an educational setting or institution. It can take place anywhere at any time, specifically for this study, in the workplace. For purposes of this research, the definition that will guide this study,

including the theoretical framework, is Marsick and Watkins' (2001) definition that informal learning in the workplace includes networking, self-directed learning, mentoring, and/or coaching. Alongside this definition, Marsick and Volpe's (1999) conceptualization of informal learning will also be applied. Further, they state that informal learning "...integrated with daily routines, it is triggered by an internal or external jolt, it is not highly conscious, it is haphazard and influenced by chance, it is an inductive process of reflection and action, and it is linked to learning of others" (p. 5).

### **Layoff Survivors**

Layoff survivors are employees who have survived an organizational downsizing and remain employed with the same organization (Allen, Freeman, Russell, Reizenstein, & Rentz, 2001; Appelbaum & Donia, 2001; Brockner, 1988a; 1988b; 1992; 1995; Brockner, Grover, Reed, DeWitt, & O'Malley, 1987; Brockner, Weisenfeld, Reed, Grover, & Martin, 1993; Cascio, 1993; Hornstein, 2009; Mollica & Gray, 2001; Noer, 1993; O'Neill & Lenn, 1995; Sadri, 1996; Shah, 2000; Weakland, 2001). In this study, layoff survivors are the participants.

### **Workplace Learning**

Since it is difficult to describe workplace learning as a single concept, it is important to also understand the many facets of workplace learning in order to help make sense of the relationships of the components involved. Therefore, by highlighting some of the definitions that have been used in the literature of workplace learning, we can begin to understand how it has so far been conceptualized in research. Some of the definitions of workplace learning are as follows, "An integrated process involving the interaction between worker and their environments as an internal process of inquisition, elaboration, and construction leading to learning result (adopted from Illeris, 2002)" (Doornbos, Bolhuis, & Simons, 2004, p. 252); "A variety of

different forms of learning which may or may not be formally structured, some of which take place spontaneously through social interactions of the workplace” (Evans, Hodkinson, Rainbird, & Unwin, 2006, p. 7); “Human change or growth that occurs primarily in activities and contexts of work” (Fenwick, 2001a, p. 4); “The way in which individuals or groups acquire, interpret, reorganize, change or assimilate related information, skills, and feelings” (Marsick, 1987, p. 4); and “The acquisition of knowledge, skills and feelings which result in improved individual or collective adaptation to change in the workplace” (Wiesenberg & Peterson, 2004). Fenwick (2008) also states that workplace learning is “not just human change but interconnections of humans and their actions with rules, tools and texts, cultural, and material environments” (p. 19). What is worth noting among the many definitions of workplace learning is the strong relationship between the individual learner and the workplace; as many scholars agree, it is hard to separate learning from work (Clarke, 2005; Eraut, Alderton, Cole, & Senker, 2000). Overall, the concept of workplace learning involves individual learning in a workplace or work environment. The definition that I will maintain for purposes of this study is Fenwick’s (2001a, 2008) due to the fact that it includes the various contexts in which the individual learner interacts with themselves and their environment.

### **Summary of Chapter and Organization of the Dissertation**

This chapter introduced and provided background to the research problem, stated the purpose of the research, and included questions guiding this study. It also laid out the significance of the study. Definitions of the key terms were also discussed. Chapter Two will include a literature review that encompasses a thorough discussion of various types of learning, workplace learning, and learning as it pertains to organizational change. In Chapter Three, the theoretical framework of Marsick, Watkins, Callahan, and Volpe’s (2006) reconceptualization of

informal learning will be discussed as a way to analyze the learning of layoff survivors, as well as help to define my definition of informal learning at work. It will also inform the research questions regarding factors that contribute to or inhibit informal learning. Chapter Four will discuss the research design, including the methodology chosen, participants, data collection and analysis, trustworthiness, and researcher positionality. Chapter Five will include the findings of the study. Finally, Chapter Six will discuss the findings, describe limitations of the research, and provide recommendations for future research.

## CHAPTER TWO: LITERATURE REVIEW

In order to understand the factors of workplace learning as it pertains to downsizing, it is necessary to first discuss the types of workplace learning that exist. This chapter will focus on what workplace learning is, the various types of workplace learning that exist, and emotional and psychological variables that occur within those types of learning.

### **Workplace Learning**

The concern with how adults learn has been in discussion among scholars since the 1920s (Merriam, Caffarella, & Baumgartner, 2007). At its core, workplace learning focuses on the individual learner and is rooted in adult education (Elkjaer & Wahlgren, 2005). Even with the research that has been conducted and put forth into the professional field of adult education, there is not one precise theory of adult learning; however, because of this research, there is an abundance of theories and perspectives that help to describe how adults learn (Ellström, 2001; Eraut, 2007; Fenwick, 2008; Jarvis & Parker, 2007; Merriam et al., 2007). A lot of the literature regarding adult learning concerns the relationship between adult learners with the workplace and the learning that occurs within that environment. Adults spend a considerable amount of time in the workplace, which in turn requires them to continue to learn in order to stay up to speed with constant changes and to remain marketable and competitive within the workplace (Ellström, 2001). Therefore, the concept of understanding adult learning has greatly shifted from being focused on the individual's perspective to being focused on the learner in the context in which the learning is situated, such as workplace learning (Merriam, 2008). In an effort to describe workplace learning, many different terms have been used unsystematically throughout the literature that has been written. These include, but are not limited to, workplace learning (Watkins, 1995), learning in the workplace (Marsick, 1987), learning at work (Boud & Garrick,

1999), and workforce learning (Jacobs & Park, 2009). For this study, workplace learning and learning in the workplace will be used interchangeably.

### **Organizational Learning**

Next to consider is another term that is often used in the literature regarding adult learning, or workplace learning, and that is organizational learning. While some scholars use it interchangeably, it is mostly used in human resource management research, whereas workplace learning is more commonly used in adult education research (Fenwick, 2010). It is important to understand the concept in order to ensure a thorough review has been conducted of learning as it occurs within an organization or workplace; however, for purposes of this study, the term will not be used and further details on why will be explained later.

Bratton, Mills, Pyrch, and Sawchuk (2008) state that organizational learning “is rooted in earlier organizational development (OD) techniques, including participatory management and self-managed work teams” (p. 73). Thus, it is rooted in the studies of management and organizations (Elkjaer & Wahlgren, 2005). Elkjaer and Wahlgren (2005) state, “Within this field, learning is regarded as a means to develop and manage enterprises as a whole – often, however, by way of individuals” (p. 16). Furthermore, it is used to describe the process of how organizations learn (Bratton et al., 2008; Fiol & Lyles, 1985). Argyris and Schön (1978) state that,

Organizational learning occurs when members of the organization act as learning agents of the organization, responding to changes in the internal and external environments of the organization by detecting and correcting errors in organizational theory-in-use, and embedding the results of their enquiry in private images and shared maps of organization. (p. 16)

Thus, in an organization, individuals do the learning; however, they do it to benefit the organization, so that they can provide the organization the capability to adjust and adapt to changes in the environment (Merriam et al., 2007).

As this concept of organizational learning has evolved, it is difficult to conceptualize one unified meaning of it (Fenwick, 2005). Because organizations are social structured entities, the division between the individual phenomenon and organizational phenomenon is often unclear. Thus, different perspectives have attempted to describe the concept of organizational learning. For instance, social cognition takes the approach of combining different views on learning theories and processes, like behaviorism, cognition, and social construction (Akgün, Lynn, & Byrne, 2003); whereas, the cognitive perspective views learning at the individual level, as well as the organizational level, and describes learning as changes in the knowledge structure (Klimecki & Lassleben, 1998). Other research focuses on the social context of organizational learning, and describes the learning process and knowledge creation as a manifestation of the relationships and activities among the people in the organization (Gherardi, 2006). Lastly, research has also demonstrated understanding of organizational learning through a social-constructionist perspective, which focuses on the processes of participation and interaction, while considering the cognitive process and conceptual structure involved (Gherardi, 2006). As shown, the idea of organizational learning is not confined to the field of adult education; in fact, the concept has been developed across a variety of fields. Because organizations continue to struggle with problems like “generating innovation, integrating new technologies, improving existing processes, predicting and adapting to turbulent conditions, restructuring staff, improving performance, ensuring equitable opportunity, and fostering quality of work” (Fenwick, 2005, p. 448), many fields have explored the idea of organizational learning and what it means for their

perspective (e.g. organizational development, human resource development, etc.). The main concept that appears to be reflected among these perspectives is that organizational learning means that there is a broader corporate knowledge, and that individuals transform their knowledge into a wider collective knowledge with others in the organization that is ultimately used for the greater good of the organization (Confessore & Kops, 1998). The issue with organizational learning is that the goal appears to be that learning takes place in order to benefit the organization as a whole. This is problematic from a humanistic perspective because it does not explain the social or power structures of the organization and does not consider the importance of the individualistic learning that occurs. Therefore, the term of organizational learning will not be used in this study.

### **Learning Organization**

As a result of the concept of organizational learning evolving, Senge (1990) created the concept of the learning organization. He defined it as “a place where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to act together” (p. 3). While the learning organization is further complex and has been debated upon on how to truly recognize or measure what constitutes a learning organization, it is important to understand the features in which Senge’s (1990) definition points out. That is, that the learning organization is a social structure, where individuals are learning collectively. This further demonstrates the social aspect of learning that occurs in the workplace, but again places emphasis on the knowledge creation as a benefit for the organization, not as an important feature of the individual learners. Therefore, it is only mentioned here to capture the

aspect of the collective learning that occurs in organizations and the concept of the ‘learning organization’ will not be further explored in the scope of this study.

### **Workplace Learning Types**

Workplace learning in this study is understood as informal, where individuals are interacting with organizational changes, particularly through tacit knowledge, in an unstructured setting, involving experiential, emotional, and socio-cultural components (Eraut, 2004; Illeris, 2003; Marsick & Watkins, 1990). It is understood as an embodied, sometimes unconscious, activity. It is treated as a process and not as an outcome. Boud (1998) states that workplace learning is “a site of intersecting interests, contested ideas, multiple forms of writing and rapidly evolving practice” (p. 11); thus, it is a context that comprises of changes from the organizational perspective, as well as the individual’s perspective and is a continuous process. In order to clarify where this understanding comes from, it is important to consider the different types of workplace learning.

There are various types of workplace learning. These are formal learning, informal learning, nonformal learning, self-directed learning, situated learning (communities of practice), and more recently, experiential learning (Merriam, 2008). Workplace learning used to be characterized as an acquisition process, where individuals would acquire knowledge and skills and then use them to further the organizations goals (Fenwick, 2008). However, in the mid-1980s, more constructivist perspectives that looked at workplace learning as sense making came forth, and that is when concepts such as reflective practices, self-directed learning, and transformative learning began appearing in the literature (Fenwick, 2008). Each concept will be discussed here.

## **Formal Learning**

Formal learning is what is considered to occur in a structured/ educational setting (Marsick & Watkins, 1990, 2001). It is the “standard paradigm of learning”, learning through acquisition, or through a traditional pedagogical framework (Beckett & Hager, 2002; Hager, 2004, p. 243). Merriam et al. (2007) state that it is “highly institutionalized, bureaucratic, curriculum driven, and formally recognized with grades, diplomas, or certificates” (p. 29). It is an intentional learning activity where structure of the learning topic is present (Merriam et al., 2007). It has historically been regarded as a form of education that serves the youth; however, with the growing institutions of community colleges, vocational schools, and even universities, formal learning is prominent even among adult learners (Merriam et al., 2007). In the workplace, formal learning can involve training and development programs offered by an organization. This includes planned learning activities that are put in place in order to help employees learn specific job skills or knowledge in order to do their job better (Skule, 2004). Eraut (2000) states that formal learning includes “a prescribed learning framework, an organized learning event or package, the presence of a designated teacher or trainer, the award of a qualification or credit, and the external specification of outcomes” (p. 114). Thus, it is essentially a planned learning experience that aims at achieving a specific outcome or goal.

Within the literature that has been discussed regarding formal learning and learning through acquisition in the workplace, some themes that have emerged according to Hager (2004) are:

...centered on individual learners, focused mainly on the rational, cognitive aspects of work performance, work performance tends to be conceived as thinking or reflection followed by application of the thinking or reflection, learning itself is taken for granted

and not theorized and problematized that workplace learning is akin to formal learning, they downplay the importance of social, organizational and cultural factors in workplace learning and performance. (p. 244)

These theories of formal learning have been developed on the notions of work like that of Schön (1983) and Argyris and Schön (1978). Among the work of Argyris and Schön (1978), they have identified single loop learning, which is a process in which the individual learner reacts to a situation, such as an error, and adjusts to it based on prior knowledge. They also developed the idea of double loop learning, where the learner is extended or challenged beyond their current knowledge or beliefs. Essentially, the perspectives of formal learning typically focus on the individual learner and how they acquire knowledge within a variety of psychological processes within a structuralized environment, and ultimately achieve some specific goal of learning.

### **Informal Learning**

Furthermore, a contrast to formal learning is informal learning. Research shows that informal learning is one of the most common forms of learning in the workplace, with at least 80% of workplace learning taking this form (Ellinger & Cseh, 2007). Informal learning is more fluid and occurs through participation (Hager, 2004). However, measuring participation in informal learning has been difficult, particularly because most adults have a hard time identifying when they are engaging in informal learning. Marsick and Volpe (1999) define informal learning as “predominantly unstructured, experiential, and noninstitutional” (p. 4). Eraut (2004) states that informal learning includes “implicit, unintended, opportunistic and unstructured learning and the absence of a teacher” (p. 250). Eraut (2004) also mentions that informal learning is much more flexible than formal learning and can take place in a variety of settings outside of the formal educational setting. Unlike formal learning, informal learning has

no set learning objective and no intentional outcome. Le Clus (2011) states that informal learning is a “planned or unplanned learning that is often spur of the moment learning, self-directed, and involves trying new things and learning along the way” (p. 370). In other words, informal learning understands that learning can occur outside of a structured program. It can be controlled by the learner in terms of when and how they learn, rather than being dictated by a formal or structured environment. It can be unplanned and experienced as a result of natural situations in everyday life; however, it can also be intentional (Marsick & Watkins, 2001).

Kim, Collins Hagedorn, Williamson, and Chapman (2004) state that “work-related informal learning activities included supervised training or mentoring, self-paced study using books or videotapes, self-paced study using computers, attending ‘brown bag’ or informal presentations, attending conferences or conventions, and reading professional journals or magazines” (p. vi). Marsick and Watkins (2001) agree stating informal learning in the workplace includes networking, self-directed learning, mentoring, and/or coaching. While there is typically not a formal teacher or trainer in informal learning situations, it is not uncommon for individuals to seek out those with more knowledge in order to work with them and gain more insight, which is how informal learning then occurs in situations such as job shadowing or mentoring. Thus, the perspectives of informal learning characterize this type of learning as being more of a social process, where knowledge is collectively gathered and is based upon the participation of learners within an environment, such as in communities of practice (Lave & Wenger, 1991).

Marsick and Watkins (1990) have argued that “... people learn in the workplace through interactions with others in their daily work environments when the need to learn is greatest” (p. 4); thus, they demonstrate how informal learning naturally occurs within the workplace. Marsick and Watkins (1997) also provide four principles that help conceptualize informal learning,

context - learning that occurs outside of formal educational environments, cognizance – intentional/incidental learning, experiential – practice and judgement, and relationship – learning from mentorships or teams. Based on the research that has been conducted so far on the concept, Marsick and Volpe (1999) also conceptualize informal learning as, “...integrated with daily routines, it is triggered by an internal or external jolt, it is not highly conscious, it is haphazard and influenced by chance, it is an inductive process of reflection and action, and it is linked to learning of others” (p. 5). Tjepkema, ter Horst, and Mulder (2002) clarify even further the significance, in which informal learning is taking place in the workplace stating,

As organizations develop into learning-oriented organizations, this has a profound impact on the relationship between work and learning. Whereas learning used to be primarily equaled to training, it now becomes predominantly associated with learning from experience, and self-directed learning. Similarly, learning is no longer regarded as a classroom activity, but primarily as something that takes place on-the-job as a continuous, ongoing activity. (p. 13)

However, even with the significant portion of informal learning taking place in the workplace, studies have further acknowledged who is participating in informal learning and who is not. The studies thus far are inconsistent in their findings. Whereas some studies show that younger and less experienced workers were reporting being engaged with informal learning and older, more experienced workers were reporting being not as engaged in informal learning (Kremer, 2005; Tikkanen, 2002), other studies report the opposite (see e.g., Livingstone, 1999).

**Informal learning subtypes.** Within informal learning, there are subtypes of learning that can occur within the workplace. These are self-directed learning, which is an intentional learning that an individual partakes in, incidental learning, which is learning something by

accident, and tacit learning, which is not intentional or the learner is not aware/conscious of the learning that's taking place (Lam, 2000; Merriam, Caffarella, & Baumgartner, 2007).

***Self-directed learning.*** To delve a little further into these concepts, self-directed learning is defined as, “the learner’s psychological processes that are purposively and consciously controlled, or directed, for the purpose of gaining knowledge and understanding, solving problems, and developing or strengthening a skill” (Long, 1994, p. 14). Therefore, it seems that within self-directed learning, goals are set, the resources needed for learning are chosen, and time is dedicated to achieving those goals. Self-directed learners seem to reflect, assess/analyze, and evaluate the learning that is taking place (Candy, 1991). Self-directed learning also entails the learner to decide what they will learn, how they will learn it, and when they learn it (Tough, 1979). Because self-directed learning is based on the individual’s initiative to learn, it is contingent upon the learner’s motivation to learn, such as readiness, persistence, desire, and resourcefulness (Confessore & Confessore, 1994).

***Incidental learning.*** Next, incidental learning is “a byproduct of some other activity such as sensing the organizational culture, or trial and error experimentation” (Marsick & Watkins, 1990, p. 8) and is sometimes used interchangeably with the term ‘informal learning’ (Le Clus, 2011). This form of learning can occur in the workplace through informal learning and highlights the learning processes, whether intentional or not. Incidental learning can be a result of mistakes made, trial and error, or through a hidden agenda of the organization’s culture (Marsick & Watkins, 2001). Studies have shown that incidental learning can occur through things such as problem solving (Kerka, 2000), and observation, repetition, and social interaction (Marsick & Watkins, 2001). Marsick and Watkins (2001) state that incidental learning “almost always takes place although people are not always conscious of it” (p. 25), and for that reason, Foley (1999)

argues that learning through social action is incidental and thus, is not typically recognized as a form of learning.

***Tacit learning.*** Lastly, tacit learning is not as explicit. In terms of tacit knowledge, it is difficult to communicate, write down, or document. It is rooted in an individual's experiences, insight, intuition, and skills. It is a knowledge that encompasses, values, cultural beliefs, and attitudes; thus, it is more of a personal knowledge that people hold in their minds. However, through tacit learning, this personal knowledge can be shared through discussions, stories, and personal interactions (Swap, Leonard, Shields, & Abrams, 2015). The forms in which tacit learning can take place in the workplace is through mentoring and storytelling (Swap, Leonard, Shields, & Abrams, 2015).

### **Nonformal Learning**

Nonformal learning is defined as learning opportunities that are structured or organized outside of the formal learning setting (Merriam et al., 2007). The biggest difference between formal and nonformal learning is that nonformal learning activities do not lead to any certifications or final accreditations of an educational program like a formal learning structure would. They are typically short term and voluntary. Thus, nonformal learning in the workplace could consist of courses, workshops, or programs that are aimed at developing knowledge and skills for workplaces, or individuals. Nonformal learning typically occurs in community based type programs (Merriam et al., 2007). From another perspective, Eraut (2000) uses this term, nonformal learning, in order to move beyond the binary model of thinking of informal learning as intentional or non-intentional. Rather, he takes an approach that is more psychological and concerned with intentionality, by outlining three separate learning modes, which are 'implicit', 'deliberative', and 'reactive' learning. Implicit and deliberative are other forms that mirror

intentional and unintentional learning, and reactive learning is “situations where the learning is explicit but takes place almost spontaneously in response to recent, current, or imminent situations without any time being specifically set aside for it” (Eraut, 2000, p. 115). An important notion to recognize within reactive learning is time and that situations that create learning do not have to happen at the same time. For instance, learners may learn something in the present that actually occurred in the past, or they may take their present knowledge to apply it to future events. Thus, Eraut’s (2000) concern of timing within a learning event further demonstrates his discussion into how this situation impacts memory and the learning acquisition of knowledge through explicit or tacit knowledge. What is problematic within Eraut’s (2000) perspective of nonformal learning is that it does not consider the sociological aspects of the learning that often occurs in the workplace, but nonetheless, it is still important to understand the scope in which he describes the notion of time.

### **Situated Learning**

Lave and Wenger (1991) aim at conceptualizing informal learning through a deeper understanding of social relations and how people interact in order to inform their learning, in other words situated learning. They situate learning in the context of social practice and state that learning occurs in everyday settings. Situated learning in the workplace specifically focuses on the dynamics and interactions between coworkers and their work environments. Lave and Wenger (1991) imply that learning can be influenced by the relationships that individuals are a part of. Workplace learning through this perspective is characterized as ongoing practices and emerging knowledge that is embodied in the action of a particular community (communities of practice). Through this lens, workplace learning is understood as both individual and social learning processes combined.

## **Experiential Learning**

While experiential learning is one that continues to be conceptualized in connection with workplace learning (Fenwick, 2000), it is important to outline the basic components of this type of learning. Illeris (2004) states the following regarding experiential learning,

Experience has important elements of content and knowledge, i.e., we acquire or understand something, which we perceive to be important for ourselves. Experience also has a considerable emotional element, i.e., we are committed affectively and motivationally to the learning taking place. And finally, experience has an important social and societal element, i.e., we learn something that is not only of significance to use personally, something that also concerns the relationship between ourselves and the world we live in. (p. 146)

This conceptualization of experiential learning is important to this study for various reasons. First, Illeris (2004) states that experience encompasses the subjectivity of learning that involves cognitive, emotional, and social-societal aspects of learning. He also emphasizes the importance of the psychological acquisition of knowledge, as well as the social interaction that occurs. These are both concepts that this study aims to discuss further. Fenwick (2000) states that the “term experiential learning is often used both to distinguish this ongoing meaning making from theoretical knowledge and non-directed informal life experience from formal education” (p. 243). In other words, experiential learning is something that occurs throughout an individual’s everyday life.

**Reflection in experiential learning.** An important component to experiential learning that has been thoroughly discussed in the literature is the process of reflection. Brockman and Dirkx (2006) state that as adults encounter different experiences in the workplace, they must try

to make sense of that experience, to resolve any conflicts within that experience and move forward. Dewey (1963) states that experiential learning occurs during times of reflection, particularly when we connect our past with our present learning. Kolb (1984), who made important contributions to understanding learning, specifically experiential learning, demonstrates experiential learning through a cycle; an experience, reflection about that experience, creation of new knowledge about that experience, to applying that knowledge to new experiences. Shumer (1991) mentions that the nature of the reflection is also of importance. Shumer (1991) states that reflection can occur in various ways, such as cognitively, affectively, and judgmentally. Cognitive reflection is where a learner tries to understand something specific. Affective reflection is when a learner tries to understand an emotional impact of an experience. Judgmental reflection is when a learner reflects on the values and personal engagement with the experience. These three components are significant because they can each play into how a learner conceptualizes an experience and what they then do with that new knowledge. Mezirow (1981) also mentions these components as a part of the reflection process and includes other aspects as well, such as discriminant, conceptual, psychic, and theoretical. Mezirow (1981) argues that each aspect helps to inform us on how experience impacts an individual's cognitive and emotional state of mind. Fenwick and Tennant (2004) argue that adult learners need to be able to reflect on their experiences, interpret those experiences, and make personal connections with them in order to construct their own knowledge. Because adults are constructing their own meanings from the knowledge that they have interpreted, their understandings of things are different (Fenwick & Tennant, 2004).

Boud, Keogh, and Walker (1985) view reflection as a three part process, stating that an experience ensues, we think about that experience as we return to it, we attend to those feelings

about the experience, and finally reevaluate the experience. This reflective process that Boud, Keogh, and Walker (1985) demonstrate allows adult learners to learn from their experience through focusing on an event that occurred and make meaning from that experience through reflection. In other words, Boud, Keogh, and Walker (1985) believe that reflection is the central aspect of an individual's experience and state that, "The reflective process is a complex one in which both feelings and cognition are closely interrelated and interactive" (p 11). Thus, the strength of this theoretical perspective of Boud, Keogh, and Walker (1985) is that they address emotions and state that reflection is an activity where people "recapture their experience, think about it, mull it over and evaluate it. It is this working with experience that is important in learning" (p. 19).

Conceptualizing one's learning experience through reflection is significant because it allows the learner to really think about the experience they have had and decide how to make meaning of that experience in order to further their knowledge. They can evaluate what to do with this new knowledge, and how to utilize it or not utilize it with future experiences. Jarvis (2006) believes that individuals have tools that help them bring their experience into their worldview; these are emotion, thought/reflection, and action. He also states that, "Emotions can have a considerable effect on the way we think, on motivation and on beliefs, attitudes and values" (Jarvis, 2006, p. 102). In addition, learners have the opportunity to decide what an experience means to them, whether good or bad, in order to relate it cognitively to other areas of their life. The importance I see in this perspective is the meaning making that takes place of an experience. Beard and Wilson (2006) also discuss the importance of emotions in learning, stating that emotions can often be the barrier of a learner not getting the most out of an experience. This could be due to negative emotions that may hinder the memory of the experience or the

significance of the experience to the learner's life, among many other things. For reasons mentioned here, aspects of experiential learning will be significant to this particular study. These reasons will be discussed in a later section.

### **Emotions and Learning**

Emotion has a significant impact on cognitive processes, such as attention, learning, memory, problem solving, and reasoning (Isen, Daubman, & Nowicki, 1987; Um, Plass, Hayward, & Homer, 2012; Vuilleumier, 2005). Studies show that emotions can have a positive impact on learning or can negatively impair the learning process. Scherer and Tran (2001) discussed these positive and negative aspects of emotions and the role they play in the learning that occurs at an individual and organizational level. Specifically, they explain the effects of emotion on “readiness to learn, the search for and processing of new information, conferral of significance, storage in memory, transfer and generalization, and disposition to reproduce” (p. 373). What is of particular concern for this study is how layoff survivors engage in informal learning after a downsizing, but as clearly demonstrated above, it is also worth discussing the impact that emotions have on the cognitive process of learning, as they do play a role in the way that layoff survivors learn. The next section will further discuss emotions as they pertain to workplace learning.

The concept of emotion has not always been a popular topic discussed within the research on the workplace. It has historically been something that is dismissed and not considered important to organizational life; however, more research has recently begun to focus on the concept of emotions and the impact it has on workplace aspects (Bierema, 2008). As Bierema (2008) states, “In spite of the managerial reluctance to embrace the emotional self as a relevant aspect of the worker, emotion makes us human, and organizations weigh on workers' emotional

health” (p. 55). Goleman’s (1995) concept of emotional intelligence is one that helped popularize the topic of emotions in organizations, by helping to describe how to process, understand, and utilize emotions and is connected to topics such as organizational development and learning (Callahan & McCollum, 2002; Gabriel & Griffiths, 2002). What is problematic with this concept is that it undermines the genuine emotional human experience in that it attempts to quantify and control an individual’s emotions (Fineman, 2000). Within a workplace, this would mean an organization trying to control an individual’s emotions in order to serve the bottom line. Emotions are much more complex and should not be confined or suppressed to meet the needs of an organization. Other scholars have acknowledged this in their research to understand the relationship between emotion and learning (e.g., Antonacopoulou & Gabriel, 2001; Brown, 2000; Gherardi, Nicolini, & Strati, 2007; Höpfl & Linstead, 1997; Vince, 2002).

While research has popularized the concept of emotions due to concepts such as emotional intelligence, it often overlooks the role emotions play in the wellbeing of employees (Bierema, 2008). Fineman (2003) states that “...despite the plethora of theoretical directions that inform organizational learning, most are substantively under-theorized because of their lack of attention to emotion” (p. 558). However, some researchers have in fact tried to communicate the importance of emotions in the workplace and have linked emotion to learning in the workplace, such as Dirkx (2000) who describes the meaning making process in transformative learning and how emotions play a major part in that. Other research has shown the emotional impacts on learning after an organizational change (see e.g., Antonacopoulou & Gabriel, 2001).

Antonacopoulou and Gabriel (2001) state that, “learning then is itself a deeply emotional process – driven, inhibited, and guided by different emotions, including fear and hope, excitement and despair, curiosity and anxiety, organized in relatively long-lasting clusters” (p. 444). They further

argue that “emotion and learning in combination are powerful sources of meaning and direction, supporting or inhibiting individuals and organizations in their attempts to re-define reality and find their place in it. The need to understand, therefore, the nature of this interdependence is paramount” (Antonacopoulou & Gabriel, 2001, p. 435). Other scholars, such as Henry, Osborne, and Salzberger-Wittenberg (1983) state that if an individual feels powerless or helpless, their anxiety may turn into fear, which could inhibit their learning capabilities; however, on the other end, anxiety could actually promote or motivate new desires to learn. Antonacopoulou and Gabriel (2001) state the importance of organizations considering emotions and learning during organizational changes mentioning, “...both emotion and learning can stand in the way of change, especially when they become entangled in the organizational and psychic dynamics of resistance, cynicism, or indifference. Emotions of acute and unchecked insecurity and anxiety can paralyze any attempt to learn, while old learning may inhibit the taking of risks and responsibility for failure, thus inhibiting new learning” (p. 447). Thus, they mention the importance of future research to consider individual’s reactions to change in order to understand the unconscious factors that shape individual’s reactions. Keifer (2002) also details the significance of research on emotional aspects of organizations and organizational changes, stating that emotions must be valued and a considerable aspect of change, not something organizations try to control or manage.

Even with the abundance of research on informal learning and the various subtypes of informal learning that have evolved, scholars agree that a more holistic understanding of it is crucial in increasing the development of professional knowledge (Hodkinson & Hodkinson, 2003; Marsick, 2009). Many scholars also agree that people never stop growing and developing in mind, body, and emotions, and that learning is about the whole person (Jarvis & Parker,

2007). Thus, as a result, in order to continue improving learning aspects in the workplace, we must consider a more holistic approach (Evans, Hodkinson, Rainbird, & Unwin, 2006). Also, with the focus on emotions in the reflection and meaning making aspect of experiential learning, it is important to go beyond the notion of thinking about experiential learning as something adult learners 'do' and how to facilitate that experience and rather, focus on the emotional aspect after an experience and how it impacts the learning that takes place after the fact. For that reason, I argue that emotions that arise from organizational changes must be acknowledged in order to understand how they impact workplace learning.

Research has shown that organizational changes can have significant demands on the learning ability and emotional lives of individuals impacted, namely the employees (Antonacopoulou & Gabriel, 2001) and the need to understand emotions in workplace learning is demonstrated throughout the literature (Antonacopoulou & Gabriel, 2001; Prasad & Prasad, 2002; Tsoukas, 2005). The aspects of emotions and learning have been studied as both separate phenomena, as well as interrelated phenomena, and in some cases, they have been discussed alongside organizational changes (Antonacopoulou & Gabriel, 2001). The positive and negative impact that emotions have on learning was recognized over twenty years ago (Antonacopoulou, 2000; Boud & Walker 1993; Fineman, 1997). Fineman (1997) states that emotion is not only a feature of learning, but also a product and a part of the process of learning. Christianson (1992) agrees that emotion is what gives meaning to people's lives, and that people's lives are ordered by needs, motives, and concerns. While it is beyond the scope of this research to study the emotional impact on learning after a downsizing, for the reasons listed above, I argue that it is important to discuss this component of learning. Furthermore, in connection with organizational

changes, emotions and learning should be studied together, as interacting and related components in future studies.

### **Conclusion**

Reviewing the various types of workplace learning is an important step in understanding the learning that employees participate in. By doing so, I was able to define the type of learning this study would focus on, that is informal learning. While there are multiple ways that employees learn in the workplace, there is one that appears to take place more often than others. As mentioned above, research shows that at least 80% of workplace learning takes place as informal learning (Ellinger & Cseh, 2007). For this reason, this research seeks to study how employees participate in informal learning when they have experienced a downsizing in their organization. The next chapter will include a discussion on the theory chosen for this study that allowed us to explore how employees participate in informal learning after a downsizing.

### CHAPTER THREE: THEORETICAL FRAMEWORK

A question that Boud and Walker (1990) pose in regards to learning that takes place outside of formal educational settings, such as in the workplace is “what can we do to enhance the possibility of learning occurring in any given situation” (p. 61). For this study, I argue that in order to enhance learning in any given situation, we must first understand the context in which learners are being asked to learn in. Therefore, with regards to the negative learning impacts that downsizing has on individual learners and learning networks within the workplace, it is important to consider how layoff survivors participate in informal learning after experiencing a downsizing. In order to keep the learning capacity of the organization intact, it is also important that once it is understood how layoff survivors engage in informal learning, that HRD professionals utilize this information in order to create or maintain environments where informal learning is likely to happen more often. In order to understand their engagement in this process, it is important to include a framework that explores the context surrounding the informal learning. Therefore, Marsick et al.’s (2006) model of reconceptualizing informal learning guided this study in exploring the context and engagement of layoff survivors’ learning. Furthermore, as mentioned previously, organizational downsizing can have negative impacts on learning; therefore, it is also important to understand what factors may contribute to or inhibit learning from occurring. Therefore, this model was used to help analyze the factors contributing to or inhibiting informal learning in the particular context of downsizing. First, an informative description of the framework will be discussed, and then an explanation of how the framework will be utilized to guide this study will be outlined. Lastly, this chapter will discuss the philosophical underpinnings of informal learning and examine it through the lens of lifelong learning.

### **Marsick Et Al.'s Reconceptualized Model of Informal Learning**

The reconceptualized model of informal learning that Marsick et al. (2006) put forth stems from a constant evolving landscape in which learning at work resides. Most importantly, the revised model aims to capture the process of learning when combining with work. They state that “the context of organizations – culture, structure, processes, practices – plays a key role in enabling or inhibiting the motivation, time, resources, expectations, and rewards for learning” (p. 591). In other words, Marsick et al. (2009) argued that in addition to individuals’ self determined goals, the context in which the individuals learned is also important to understanding how they learn. This was the primary focus of their goal in reconceptualizing their model for informal learning. While it is important to consider how an individual engages in informal learning, it is harder to understand this without also considering the context in which the individual is learning. Marsick et al. (2010) further state that workplace educators should “...pay as much attention to organizational supports and barriers to learning as they do to learning processes and strategies” (p. 593). I agree and would argue that this is especially important in times of organizational change, such as downsizing.

The context in Marsick et al.’s (2006) model is the workplace. There are various components within this context that they utilize to describe how individuals learn. These are, interpreting triggers, examine alternative solutions, learning strategies, produce the proposed solutions, assess intended and unintended consequences, lessons learned, and framing the business context. The model may sound cyclical; however, it is important to note that this model is not intended to be used as a step-by-step framework, but rather iterative or a “loose framework within which many learners interact in the pursuit of a mix of individual and organizationally-determined goals” (Marsick et al., 2006, p. 591). For purposes of this study, the main

components from the model that were used were triggers, learning strategies, and lessons learned. Furthermore, I argue that in order to fully conceptualize how layoff survivors engage in informal learning within the context of a downsizing, specific individual factors that may contribute to or inhibit informal learning must also be considered. Marsick et al.'s (2006) model also helped analyze these factors within the context of a downsized organization. Furthermore, this model was chosen as it has previously been tested in various studies that focused on how individuals learn in the workplace.

### **Utilizing the Theoretical Framework Chosen**

Within the many perspectives and forms of workplace learning that were mentioned, a commonality among them is that workplace learning is a process that involves many complex features, but at the core of most of them is self-directed concepts, informal learning notions, and reflective processes. Within these core aspects lies an important feature of this research study, that is how layoff survivors engage in these processes, specifically informal learning, after going through a downsizing. How do layoff survivors engage in informal learning when they have just survived a downsizing? This is the question at the heart of this research. The decision to utilize Marsick et al.'s (2006) model stemmed from the recognition that research shows that downsizing has a negative impact on learning in the organization, but that research still lacks a review of how layoff survivors are actually engaging in informal learning in a downsized environment (Scherer & Tran, 2001). Therefore, in order to understand this population and this organizational event more thoroughly as it pertains to workplace learning, it is important to consider the context in which layoff survivors are learning. This model allowed for that. In this study, the downsized organization was used as the context for which informal learning was taking place. Furthermore, while the model includes the context of the workplace, it also allows for experiences from layoff

survivors to be utilized for data collection and analyzing. Using this perspective helped to establish the importance of how layoff survivors learn in order to further understand how organizations can decrease the negative impact downsizing has on their learning capacity. I also argue that the reconceptualized model of informal learning was appropriate in studying the learning of layoff survivors primarily because it includes and recognizes the context in which this learning is occurring and it also provides a framework for the processes that layoff survivors may go through as they learn, in which will then drive the impact into learning in the workplace after downsizing.

### **Informal Learning Through the Lens of Lifelong Learning**

As discussed in the literature review portion of this paper, informal learning is the most common form of workplace learning (Ellinger & Cseh, 2007). Informal learning can be viewed through various theoretical perspectives, but for purposes of this study, it is viewed through the lens of lifelong learning. There are multiple variations to describe lifelong learning, and in this study it is understood as any and all activities that are experienced throughout one's life, with the purpose of gaining knowledge or skills in a personal, social, and/or employment capacity (European Commission, 2002). Lifelong learning stems from the fact that our world is ever changing, and as it changes, so do the skills and knowledge that society needs. As a result, in order to keep up with the pace of change, learning should continue to take place throughout one's life (Berman, 2020). While lifelong learning does extend beyond the scope of the workplace and is embedded in multiple aspects of someone's life, for purposes of this study, the focus is on lifelong learning as it pertains to workplace learning.

Due to the fact that the goal of this research is to not only provide information to better serve layoff survivors in their learning experiences, but to also mitigate learning gaps in

organizations as they experience organizational changes, it is important to understand this phenomenon through a perspective of lifelong learning. As Vithayaporn (2021) states,

When responding to the global demand and economic competitiveness... organizations need to implement strategies, and the most effective strategy is ongoing employee learning and development in the workplace... Lifelong learning is critical for success in the global knowledge economy. (p.110)

In other words, while informal learning is undertaken at the employee level, organizations must provide environments that are conducive for learning to take place. Otherwise, they risk the chance of remaining behind their competition and not able to keep up with the demands of the changed economy. Additionally, they risk losing employees who consider themselves lifelong learners and decide to exit the company for other opportunities, thus causing the organization to lose talent and knowledge (Vithayaporn, 2021; Watkins, Marsick, & Kim, 2012). With that said, as I think about the ever changing economy and the impact that has on the workforce, I strongly believe it should be a high priority for organizations to enhance their learning culture and create opportunity for employees to continue to learn, both formally and informally.

Viewing informal learning and this research through the lens of lifelong learning allowed me to analyze the needs and desires of the learner (the layoff survivor) as it pertained to their individual career goals. It also allowed me to explore the factors of the organizational context that either supported or inhibited their learning in order to better understand how organizations can create learning environments that are conducive to lifelong learning. Overall, this perspective was utilized in the analysis of this study's findings and helped understand why employees may continue to have self-directed learning tendencies even during organizational changes.

## Conclusion

Literature lacks an integrative framework that explores the in depth examination of layoff survivors as it pertains to workplace learning after an organizational change, particularly a downsizing. While studies have demonstrated that learning suffers after a downsizing has occurred due to issues such as lack of motivation, disruption in learning networks, and more, studies have not demonstrated specifically how layoff survivors engage in learning after this event (Hornstein, 2009; Reynolds-Fisher & White, 2000; Susskind, Miller, & Johnson, 1998). While some of the issues that impact learning is understood, it is critical to also understand what, if anything, is actually taking place in terms of learning. By understanding how layoff survivors are participating in learning within the context of a downsized organization, we can further understand how to help mitigate or facilitate a more conducive learning environment when a downsizing occurs. This study used Marsick et al.'s (2006) informal learning model in order to do this. It also viewed the study through a lifelong learning lens in order to fully understand and explain layoff survivors' learning. Utilizing these perspectives also helped explain layoff survivors' learning behaviors. Finally, I believe that the context in which this study focused on is integral to understanding the learning processes after a downsizing.

## CHAPTER FOUR: RESEARCH DESIGN

This chapter discusses the case study methodology that was chosen to conduct this study. The chapter will first discuss what case study is and the advantages and disadvantages to using case study. The chapter will then discuss the case selection, participants, data collection, and data analysis. Lastly, the chapter will discuss the credibility of the research, as well as the researcher's positionality.

### **Methodology**

When studying human experiences, it is difficult to examine firsthand learning experiences from a quantitative, objective, formulated measure; thus, a qualitative, case study methodology has been chosen. Merriam and Tisdell (2016) state that "Qualitative researchers are interested in understanding how people interpret their experiences, how they construct their worlds, and what meaning they attribute to their experiences" (p. 15); therefore, it is the most appropriate methodology to conduct this research. As a result, I argue that a qualitative approach is compatible with a case study for various reasons. First, Merriam and Tisdell (2016) state that a case study allows researchers to explore complex social environments in detail and that it is an appropriate method to frame a study when multiple qualitative sources are desired. Hence, the case study approach allows an investigation of several participants in order to describe the complexity of a specific situation. In this study, several participants were interviewed as a means for data collection. Yin (2009) specifically defines a case study as, "An empirical inquiry that investigates a contemporary phenomenon within its real life context; when the boundaries between phenomenon and context are not clearly evident" (p. 23). Yin (2016) also states that case studies are appropriate when a researcher expects there to be significant and meaningful insight revealed about a phenomenon. This study aimed to do just that and explore a topic of

downsizing that did not exist in the literature in regards to how layoff survivors learn. Merriam and Tisdell (2016) further state that a case study is used to examine or explore a program, person, object, organization, or phenomenon and that when fused with a case study method, allows researchers to understand “the essence and the underlying structure of a phenomenon” (p. 42). In other words, case studies provide a researcher with the opportunity to observe and analyze data on a smaller level.

Furthermore, Creswell and Poth (2018) explain case study as a “qualitative approach in which the investigator explores a real-life, contemporary bounded system” (p. 96-97). Merriam (2007) also iterates that a case is only valid if it has boundaries; cases can be things such as a process, an organization, a person or people, or a phenomenon. For purposes of this study, the downsized organization was the real-life bounded system. Additionally, what constitutes a case is that it is bounded by time and activity (Yin, 2009, 2012). As the researcher, I collected data over a period of time of approximately six months.

As outlined above, while there is various interpretations of what constitutes a case study, this study was guided by Merriam’s (2007) case study approach. Merriam (2007) argues “the case as a thing, a single entity, a unit around which there are boundaries” (p. 27). Merriam (2007) further states that as long as the researcher can specify and draw boundaries around the phenomenon being studied, it can be argued as a case. Important attributes of a case study include focusing on a particular situation, yielding a rich description of the phenomenon being studied, and clarifying the understanding of the phenomenon (Merriam, 2007). This study aimed to include these characteristics, as there was one particular phenomenon under study that I wished to provide clarifying information on. I will next discuss the case selection for this study.

### **Case Selection**

One energy company situated within the state of Oklahoma was chosen for this study. This energy company was chosen due to the fact that it had recently undergone an organizational downsizing. At the time this study was conducted, the organization employed a little less than 200 people, in which the employees who remained were deemed the layoff survivors. In addition to undergoing the downsizing, this company was also chosen due to my proximity to this particular organization. As an employee of this company at the time of this study, I had already built a relationship with multiple participants. As a result, employees expressed their willingness to participate due to our working relationship. Overall, this case was bounded by the downsizing event at this energy company and the layoff survivors who remained employed there.

### **Advantages of Case Study**

There are several advantages to using a case study; the first being that various methods for data collection can be utilized in order to provide a thorough scope of the research (Merriam & Tisdell, 2016). For instance, by using semi structured interviews, that are rooted in the philosophy of phenomenology (van Manen, 2014), as a data collection method within this case study, I was able to provide a rich and detailed description of the experiences of layoff survivors on a topic that has yet to be explored (van Manen, 2014; Yin, 2009). Secondly, because phenomenology seeks to explore the experiences of a participant, the results have emerged directly from their interviews and the data collected, rather than being imposed through a structured statistical analysis (van Manen, 2014). Next, case studies can provide in-depth and rich descriptions, thus they have the potential to provide a new perspective and understanding of this phenomenon to others (Yin, 2009). In acquiring new understandings, researchers can develop new questions to further the research on this topic. Also, because case studies focus on one phenomenon, in this case workplace learning after a downsizing, the study will help to

provide a better understanding of the workplace learning that layoff survivors engage in as a result of the information that has emerged from the data collected. Lastly, using the case study methodology allowed me to gather the stories of layoff survivors, stories which may otherwise be forgotten or never heard, in order to gain a deeper understanding of their learning experience after a downsizing.

### **Disadvantages of Case Study**

Creswell (2014) states that a disadvantage of using a case study method is first identifying the case or bounded system to study and then determining whether or not the case is worth examining or exploring. Another disadvantage is that because the primary investigator or researcher, in this case myself, acts as the primary instrument in collecting and analyzing data, such as the interviews I conducted, this could ultimately lead to questions of reliability and integrity by readers of the research. However, I further discuss how I have increased reliability in a later section. Because this case study involved one organization and just a number of the employees within that organization, another disadvantage to utilizing this methodology is that alternative explanations cannot be ruled out and causal inferences cannot be made. The learning practices of the layoff survivors in this study may or may not reflect what other layoff survivors experienced in their organization after a downsizing. Case studies may suggest the possibilities of what could be found in other organizations, but further research is needed in order to verify whether findings from this study is relevant elsewhere.

## **Methods**

### **Participants**

The participants in this study were 10 employees who were deemed layoff survivors of an organization that has undergone a downsizing over the past few years; thus, purposive sampling

was used for selection (Creswell, 2014). All employees of the organization were sent a recruitment email asking for their voluntary participation in the study. Out of the less than 200 employees, only 10 employees responded that they were willing to participate. Multiple employees responded stating they were not interested in participating because they were already working on exiting the company, or about to begin a new job elsewhere. It should also be noted that there were around 20 employees and contractors who had recently joined the company after the downsizing, and therefore did not qualify to be a participant. In order to be deemed a layoff survivor, the parameter was set that the employee had to have been employed with this company at the time the downsizing occurred. The employees were deemed ‘layoff survivors’ if they worked at the organization before the downsizing occurred and ultimately survived the downsizing and are still employed by the organization. This means that the employee must have been employed by the organization for at least one year, due to the last downsizing that occurred. In order to fulfill purposive sampling, and to also ensure that the participation was voluntary and offered to a large quantity of employees, a recruitment email was sent to employees at the chosen downsized organization. Yin (2016) states that, “The goal or purpose for selecting the specific instances is to have those that will yield the most relevant and plentiful data – in essence, information rich – given your topic of study” (p. 93). These employees spanned across the organization, which resulted in providing inclusive stories and different perspectives from different departments. This is what Guba and Lincoln (1989) state is a maximum variation sample, where the research attempts to maximize the information that is gained. The purpose of this is to “include sources that might offer contrary evidence or views” (Yin, 2016, p. 94). This also provides additional credibility to the study by demonstrating that participants were not picked based on if I felt they would confirm my preconceptions, but rather, would provide

various viewpoints to help explain the phenomenon. In order to maintain anonymity of participants, the departments in which they resided will not be disclosed. However, in order to provide some context around the participants, I have included participant demographics, such as gender, race, and number of years in profession in Table 1 below. To further ensure anonymity, the number of years in the profession is included in increments of five, such as 5+ being at least 5 years, but no more than 10 years, and so on.

**Table 1**  
*Participant Demographics*

<b>Participant</b>	<b>Gender</b>	<b>Race</b>	<b>Number of Years in Profession</b>
A	Male	White	10+ years
B	Male	White	5+ years
C	Male	White	10+ years
D	Female	Black	5+ years
E	Female	White	10+ years
F	Male	Black	10+ years
G	Female	White	15+ years
H	Female	White	5+ years
I	Male	White	5+ years
J	Male	White	15+ years

**Data Collection**

Qualitative research relies primarily on the researcher to be the main instrument of inquiry (Creswell, 2014). Yin (2009) agrees that interviews are insightful, targeted, and focused

directly on a case study topic. Charmaz (2006) states, “intensive interviewing permits an in-depth exploration of a particular topic or experience” (p. 25). For these reasons, the main data collection technique that was utilized in this study was semi-structured interviews that were audio recorded and later transcribed. A semi-structured interview protocol included questions and ready probes in order to gather further information (Creswell, 2014). The similarity of the study conducted during my time in the qualitative research classes, provided me an opportunity to refine and develop an interview instrument that was based on a more thorough review of the literature. The structure of a semi-structured interview allowed for a conversation like setting to take place, while also having ready probes available that provided flexibility and support for discussing the phenomenon under study (Charmaz, 2014; van Manen, 1990). In order to ensure further credibility, I shared the interview protocol with a faculty/committee member and solicited feedback that would strengthen the interview protocol. The interviews lasted approximately 60 minutes with each participant and were conducted in the most comfortable space of each participants’ choosing. After the interviews took place, I then transcribed the interviews. To verify accuracy of the transcriptions once they were completed and to ensure member checking, I then provided each transcription to the corresponding participant and asked for them to verify that the transcript was correct (Guba & Lincoln, 1989). All participants verified that their transcript was correct. After conducting member checks, I then reviewed each transcript one more time to familiarize myself even more with the data. This helped me to prepare for the data analysis (Creswell, 2014).

Researcher memos were also kept for the duration of the study. These memos allowed me to keep a journal of my own reflections throughout the study, regarding thoughts about the interviews, correspondence between me and the participants, and insight into my decisions made

throughout the research study. These were included and reviewed in the data analysis portion during thematic reflection (van Manen, 1990).

### **Data Analysis**

Hatch (2002) states that “data analysis is a systematic search for meaning” (p. 148) and Creswell (2014) further agrees mentioning that data should be analyzed for significant statements, sentences, or quotes that help form an understanding of how a particular phenomenon was experienced by the participants. Creswell (2014) reiterates that these significant themes and statements should be utilized from the analysis in order to write thick descriptions of the experiences of the participants. However, Yin (2009) states before a researcher can develop any themes, they must code the data. Thus, the steps I took to code and analyze the data are detailed further here.

Yin (2016) states that an examination of the data collected is an important first step in analyzing it. This research followed the data analysis and coding procedures that Creswell (2014) and Charmaz (2014) have put forth. For coding specifically, Charmaz (2014) states conducting line-by-line coding first allows a critical analysis of the data to ensure all data is looked at. I first conducted line-by-line coding to ensure that I did not get caught up in the overall story of a participant, but rather that I focused on each detail of the data. Then, a constant comparative method of focused coding took place in order to analyze the codes to pull out the most significant or frequent codes (Charmaz, 2014). This focused coding was good starting point for “uncovering thematic aspects in lifeworld descriptions” (van Manen, 1990, p. 90). Lastly, utilizing axial coding as the third step allowed subcategories and categories to be linked together in order to make sense of the concepts that were emerging from the data (Charmaz, 2014). What should be noted, however, is that Lincoln and Guba (1985) state that member checking is “the

most critical technique for establishing credibility” (p. 314). Thus, member checking is when the researcher solicits feedback from the participants on whether or not they captured the experience of the participant accurately. Thus, before the last step of coding was completed (axial coding), I conducted member checks with each participant by providing them a copy of the transcription from their interview. This allowed each participant to read over the transcript to ensure I included what he or she said. By allowing the participant’s voice in this step, I not only was able to confirm that I transcribed their interviews accurately, but I was also able to ensure further credibility that my study shares the participants’ stories and not my own.

As for the direction of the data analysis, Creswell (2009) states six steps should occur; these are:

Step 1: Organize and prepare the data for analysis.

Step 2: Read through the data.

Step 3: Begin detailed analysis with the coding process.

Step 4: Use the coding process to generate a description of the setting or people as well as categories for these for analysis.

Step 5: Advance how the description of the themes will be represented in the qualitative narrative.

Step 6: Interpret the meaning of the data. (p. 189)

Creswell (2009) also states that these steps are not linear, but should be an interactive process, where steps are returned to in order to saturate the themes and the analysis process. As this case study was an interpretive approach, I continued to return to the steps of analysis and coding as needed in order to ensure I provided a clear description of the phenomenon. An example of the coding process is provided in Table 2 below.

**Table 2***Example of Data Analysis*

<b>RQ 1b: What are the learning strategies that are used?</b>		
<b>Final Theme</b>	<b>Sub Set Themes</b>	<b>Initial Codes</b>
Self-directed learning	Learning as you go Ask lots of questions Trial and error Learning by doing Research historical notes	Work varies daily Looks at old notes to learn Asks questions Checks against others work Self taught No time to get help Learning curves Just figure it out on your own
Self-directed learning	Learning as you go Ask lots of questions Trial and error Learning by doing Research historical notes	Work varies daily Looks at old notes to learn Asks questions Checks against others work Self taught No time to get help Learning curves Just figure it out on your own

High-level learning	No in-depth explanations Do Bare Minimum No time to train or cross train	Lack of communication Time consuming to try and teach Too much on plate Stressful deadlines Overwhelmed with work Quantity of quality
<b>RQ 2b: What individual factors support or inhibit learning?</b>		
<b>Final Theme</b>	<b>Sub Set Themes</b>	<b>Initial Codes</b>
Self interest	Reflection on career Goals for future	In it for myself How this can serve me Learn what you can Always on defense Less loyalty to organization
Emotions	Frustrated Apathetic	Not hopeful Over it Discouraged Uncertainty Not caring to learn Stressed

## **Credibility and Dependability of Research**

Because qualitative research designs are not credible based on internal or external validity like quantitative designs are, Lincoln and Guba (1985) have described criteria that are more appropriate for judging the trustworthiness of qualitative research. The four criteria are credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985). In order to ensure that this study met the criteria here, I kept an audit trail of all the steps taken in this research study. Schwandt (2015) states that an “audit trail is a systematically maintained documentation system” (p. 10). Thus, my audit trail provides all of the evidence of the work that was done throughout this study, from meeting dates with participants, to transcription of interviews, notes of analyzing the data, to coding steps, to member checking. It has a thorough account of all the work put into the study. Furthermore, Yin (2009) states that to increase reliability in data collection and analysis, the researcher should always have a report/notes that include citations, details of what artifacts or interviews were collected and when, a procedural outline of the case study that shows they were followed, and a clear correlation between the research questions and the content of the data collection process. He refers to this as a “chain of evidence” (Yin, 2009, p. 122), and this is something that I considered very important to my study. As mentioned in the data analysis section, I also conducted member checks in order to ensure that the research is a true reflection of the participants’ stories.

## **Researcher Positionality**

It is important to research the self and research the self in relation to others in order to discover hidden dangers when conducting research (Milner, 2007). Milner’s (2007) framework emphasizes the significance of researching the self when studying populations that have historically been marginalized, and to this I certainly agree; however, I also believe that his

framework is important and his ideas can be used by all qualitative researchers who may be dealing with vulnerable populations, who may be in a position of authority due to experience or background, or who may be an ‘insider’ who needs to reflect on how their positionality within the study may impact the decisions they make regarding said study. With that being said, as the researcher who conducted this study, it is important that I am explicit about my experiences and connection to the phenomenon being explored in this study in order to clarify my positionality and instill trustworthiness throughout this research project. I situate myself, both as the researcher and as a layoff survivor of the organization being studied, in the narrative of workplace learning. Thus, because I took a case study approach that is guided by constructivism, I could not and did not wish to separate myself from the research topic or the participants being interviewed because of my close proximity and connection to the experience (Hayes & Oppenheim, 1997). Howell (2013) states that constructivism relies on shared experiences and research results are “created through consensus and individual constructions, including the constructions of the investigator” (p. 87). Creswell (2005) also states that the researcher should “reflect on their own biases, values, and assumptions and actively write them into their research” (p. 50), which can include personal experiences, or how the researcher will work with the participants during the research process. Therefore, I have reflected on myself and myself in relation to others in order to provide transparency within and about this study in which I will attempt to explain next.

The participants in this study were employees who have experienced a downsizing in their organization. As the researcher conducting this study, I was not one who was interviewed in this study; however, I am one of the employees who experienced the downsizing. This experience is ultimately what led to my interest on the topic. One thing that I continued to reflect

on throughout the beginning stages of this research is that the employees who chose to participate and be interviewed all have varying backgrounds. Some are college educated, some have graduate degrees, and others have only a high school education. Hence, I stayed mindful of this and remained cognizant of these varying backgrounds during my interviews and throughout my own conceptualizations of their stories. To further elaborate on this, I believed that with my identity as a PhD student who actively engages in studying adult learning, I did not ask specific questions that pertained to a formal terminology, such as ‘incidental learning’. Instead, I asked questions that were focused on learning in general, and allowed the participants to describe their learning in their own words. Additionally, while my theoretical framework served as a guide to explore the learning behavior of these employees, there were many other factors underlying how and why they process organizational changes in a certain way, and their backgrounds could have certainly played into this. Also, because I am so closely connected to the experience, I remained aware of my positionality as a layoff survivor myself, in order to not place my own thoughts of what I think other’s may have experienced and made sure that the participants voices were heard instead. This was validated through my use of member checking, where each participant reread their transcribed interviews and confirmed it was what they had discussed. Due to the fact that I knew each of my participants personally because of our place of employment, they also felt invested in the research and all were diligent in responding to my member checking. However, with that being said, it is important to note that since I was also a layoff survivor, I did have my own opinions and experiences with the downsized event. While this was not reflected in the transcriptions, it may have been reflected through my analysis of the interviews. Furthermore, due to my closeness of the topic and my desire to help future layoff survivors, I do not intend to completely displace myself from this research, as I am connected to it as a fellow layoff survivor.

Finally, because I am a PhD student who is currently engaged in various learning activities and I started this study with some knowledge of what research says about employees and workplace learning, I had to ensure that I remained aware of this and reminded myself that the participants may not be aware of the learning processes they participate in in the workplace. Rather than use this to discount participants' stories, I only remained aware of this as someone who has read the research, but not actually heard from a participant's point of view firsthand. I was most interested in focusing on what the participants would share and the new insight that they have brought to this topic. Due to these reasons and my closeness to the research topic, researcher positionality and reflexivity have both been an important component of developing and conducting this study.

## CHAPTER FIVE: FINDINGS

As mentioned in prior chapters, while there have been numerous studies on organizational downsizing and layoff survivors, research lacks the specific discussion of how layoff survivors learn in a downsized organization (Cameron, 1994; Hornstein, 2009; Zatzick & Iverson, 2006). Studies also show that informal learning is the most prominent form of learning that takes place in the workplace, and for this reason, informal learning was the basis for understanding how layoff survivors engage in this type of learning after a downsizing. Therefore, the purpose of this study was to explore how layoff survivors engage in learning after a workplace downsizing. This research also explored the factors that facilitate or inhibit learning in the context of downsizing. The research questions that guided this study were as follows:

1. How do layoff survivors engage in informal learning within the context of downsizing?
  - 1a. What are the triggers that initiate the informal learning process?
  - 1b. What are the learning strategies that are used?
  - 1c. What are the lessons learned?
2. What are the factors that facilitate or inhibit learning in a downsized organization?
  - 2a. What organizational factors support or inhibit learning?
  - 2b. What individual factors support or inhibit learning?

Through semi-structured interviews, participants shared their learning experiences after an organizational downsizing. They also described triggers for participating in learning, the learning strategies that were used, and the lessons they learned. The organizational factors and individual factors that either contributed to or hindered learning were also discovered. In this chapter, I will

discuss the research setting and the layoff survivors who participated in the study. Lastly, I will then present the findings of the study.

### **Research Setting and Participants Overview**

In order to fully understand a case study, it is important to understand the setting in which the focus of the study takes place. This research study took place at an energy company that had undergone several organizational changes over the last few years, particularly several downsizings. In order to fully conceptualize the company, it is important to understand the history of it, which includes the organizational changes it went through leading up to this study taking place. A brief history of the company will be discussed, as well as the current state of the company at the time this study took place.

This organization was once one that welcomed and invested in employee training, learning, and innovation, but it quickly became an organization that could no longer financially maintain such a program. Among many factors, this was mostly due to the downturn of oil prices in 2014 (Kell, 2015). When the company was forced with the decision to cut costs, the learning opportunities they were once able to afford to provide to their employees were the first to be cut. Secondly, the company made the decision to layoff employees with the goal of “right sizing” the company and cut even more costs. The company used this strategy multiple times over the next 6 years, making the company personnel smaller and smaller every time. To put this into context, every time a layoff was announced, employees could not fathom being more understaffed than they already were. They could not understand how work could be accomplished with the amount of people that kept getting laid off. Layoff survivors found themselves responsible for work they had never done before, in areas they knew nothing about. This exemplifies where the company

was at the time of this study. At the time of this study, there were less than 200 employees, but it is worth noting that this company once employed more than a thousand employees.

As mentioned previously, there were 10 employees who voluntarily chose to participate in this study. To ensure anonymity of the participants, their titles or departments will not be stated. However, with that said, it should be noted that these participants came from various departments across the organization. Some had lost managers, became managers as a result of the layoffs, lost coworkers, lost whole departments, became in charge of a new department, and more. While every participant experienced the downsizing differently, what will be demonstrated in the findings later, is that they all shared similar experiences when it came to learning their new tasks, as well as the factors that either helped or did not contribute to their learning.

To provide some additional context for the environment in which layoff survivors worked, it is worth noting the office setting and the proximity in which they worked. All participants had their own office. These offices were located in one singular building, on multiple floors. Many floors remained mostly empty, with just a few employees on each floor. The management team initiated an effort to bring employees closer to each other, where more people would share a floor, but overtime, it became too much due to having to move offices and files without the resources and staffing to do so. Thus, this resulted in many employees not having direct face-to-face contact with others as much as they were used to having. Whether this factor had a role in the learning participation will be discussed further in the findings section next.

## **Findings**

With the help of focused coding, there were two to three themes that emerged from the data for each particular question. Table 3 presents the major themes identified in this study:

**Table 3**  
*Table of Findings*

<b>Findings</b>	
<b>Research Question</b>	<b>Final Themes</b>
RQ1. How do layoff survivors engage in informal learning within the context of downsizing?	Self-directed learning Incidental learning
RQ1a. What are the triggers that initiate the informal learning process?	Lack of time Reallocation of work Loss of learning network
RQ1b. What are the learning strategies that are used?	Self direct learning High-level learning
RQ1c. What are the lessons learned?	Be responsible for self Be more efficient
RQ2. What are the factors that facilitate or inhibit learning in a downsized organization?	Facilitate – Individual Inhibit – Organizational
RQ2a. What organizational factors support or inhibit learning?	No learning culture Changes within management Lack of strategy and direction
RQ2b. What individual factors support or inhibit learning?	Self interest Emotions

In this section, I will share the themes of the first set of research questions. Then, I will share the second research question’s themes. In order to understand how to better serve layoff

survivors after a downsizing, professionals should first understand how they engage in informal learning after such an event and in order to understand this, the experiences should come from the stories of the layoff survivors. Therefore, these themes will be demonstrated through excerpts of the interviews with the participants. The first question that guided this study focused on how layoff survivors engage in informal learning and is the best place to start in order to provide a thorough understanding of the overall concept of informal learning in a downsizing.

### ***How Layoff Survivors Engage in Informal Learning***

**Triggers for Learning.** The first subset research question was what are triggers that initiate the informal learning process? The three themes that emerged as triggers were lack of time, reallocation of work, and loss of the learning network. Employees expressed that after the layoffs occurred, there was so much work left to takeover that it was nearly impossible to get everything done. They also shared that other employees lacked the time to train or teach them, which ultimately caused them to engage in learning on their own.

**Lack of Time.** When it came to discussing factors that triggered learning, the lack of time was a common theme. Participants described how they did not have time to train or teach others, while others did not have the time to train or teach them either. As a result, the lack of time employees experienced resulted in them having to learn many things on their own, or even caused them to learn things they did not have to know previously. Participant B described it as follows,

I feel like the foundation of it is, hey, we don't have the time. Outwardly everyone is like, hey, if you need help, you know, let me know. We can sit down and do this, we can do that. But then when it comes to, okay, well let's sit down, it never happens, you know? So, umm, I think it's still just, there's... there's not enough time.

Participants described how they would be asked to take on certain tasks or duties, but then no one would have the time to help them or teach them what or why they were doing a particular task. For some, this was frustrating because they were not sure if they were doing the job right or not. Only when they would finish a task would someone come in and say, you did this wrong, it should have been done this way instead. Employees felt that learning how to do something from the beginning rather than when they finished could have saved a lot of time. However, three participants described that by having to do tasks on their own, they learned more than they would have if someone had shown them how to do it. Participant A expressed the lack of time several times in their interview:

You just don't really have the time to say, again, to go sit there and get really good information out of them. It's just you're trying to get done what you have for the day and keep the day to day going....

So I don't think there's a lot of free time of saying man, how can I really help those around me.

This participant went on to share that the lack of time caused them to learn new things, even when they did not realize it. They were put into a position to have no choice but to learn something or fail to do the task.

***Reallocation of Work.*** Another factor that triggered informal learning in the employees was the reallocation of work, or lack thereof, that always happened after a layoff. When asked about some problems that an employee had encountered since the downsizing, Participant I stated the following:

I think most if it is just post-RIF (reduction in force) attrition and communication around that and kind of reestablishing who was in charge of what and other departments, of –

Hey, I used to go to this person for this, who's doing that now? Oh, we haven't actually thought about that 'cause we didn't know that was missing.

This employee went on to describe how when there was no one to reach out to about a particular question or issue, they would end up reading, researching, and investigating it themselves. They expressed that this took up more of their time, but they found that it was the only way to get an answer they may have needed to do their day job. This same participant also mentioned that the lack of reallocation of work caused them and their manager to take it upon themselves to reallocate who was going to learn what.

Participant A described how an entire new department was reallocated under them, and that they had no experience in that area.

Yeah, truthfully a lot of it has been lack of knowledge. So the new department, especially, we weren't given any kind of manual or any kind of training. It was... just try to find it and learn on the fly, so that's led to mistakes. That's led to not doing a very good job at it.

While this participant expressed concern in not doing all of the work correctly, they shared that they knew they could only do the best they could and hoped that the management would understand that.

***Loss of Learning Network.*** When the downsizing occurred, many employees were left with either no one else in their department but them, entire departments eliminated, or very few employees left in their department that was historically a larger department. Employees expressed that the loss of their learning networks pushed them to learn things they had never learned before, and do work that they typically would not do. Participants shared that the loss of people that they would normally rely on for information caused them to have to either learn other

jobs and tasks quickly, or try to find other people they could try and work with to work through the learning loss. Participant G shared that they relied on so many other people for information that they needed, that the layoffs negatively impacted their ability to do their job and caused them to relearn many things. When asked about a challenge they had to work through they stated,

Figuring out your network again. That's always difficult because I rely on so many people in the company for things. You have to reconnect. I lost some of my network, so it's ya know, regaining a new network so that I know what's going on. Then I'm trying to learn what other people did in the past since I no longer have those knowledgeable people to rely on.

This participant also shared that they felt a lot of the positions that the company eliminated were critical and they found themselves learning work that they never thought they would.

Another participant shared that when they lost their coworkers, they were stressed that they would not be able to do the new work they were given. They said that even though they lost their usual network of employees in which they learned from, they were thankful that some of their former coworkers had kept thorough notes on certain tasks. They shared that while it did take time to read through their notes, they were thankful that this made their learning a little easier. They felt having a strong learning network prior to the downsizing that took time to document work processes, helped them learn once those employees were laid off.

**Learning Strategies.** All participants shared the various strategies they used to learn their tasks and jobs. The two most common strategies were self-directed learning and high-level learning. Within these two themes, participants shared that they often asked questions when they could, tried to spend time researching things on the internet, looking through old files, and just

figuring things out as they went throughout their day. All participants shared that they felt responsible for their own learning, whether that was learning an entire new role or just a new task. They also shared that they felt their coworkers desired to help; it was just the lack of time that prevented them from being able to.

***Self-directed Learning.*** One particular employee, Participant A expressed how there was a lot of self-directed learning that took place as a result of the lack of formal learning or training from the organization. However, they felt that while they were responsible for their own learning, they lacked the confidence that they were learning the correct stuff.

It's just been trial and error... Any leaning is just done on your own, so it's kind of as you, again, pick up new things that are, there's not anyone else to do them, so you're learning. You may not be learning the right way to do it, or the best way to do it, so you're learning by doing but not learning correctly.

Participant D expressed the same sentiment,

I think for the past year, since I switched departments, it was very much, you read, you figure it out, you know, do those types of things. Um, and I think it's mainly because there's no one to teach it, so you're learning by yourself and you have to.

When Participant C took on more roles within their department, they described their process for learning and how they would even try to improve the work:

The people that aren't here, I try to go back and see their processes to see how they may have done it. I try to first go based on what their notes were or their instructions on how they did it and then just throughout the more comfortable with it, I try to see it, that maybe I can improve the processes. Which I think I've done, and so the biggest part is trying to get comfortable to make sure you understand it completely.

Participant B described that they were thankful to have the resources, such as Internet, to be able to teach themselves and how staying up to date in their field is important.

I'm fortunate that we have resources that I can teach myself a lot of that. There's like, we have subscriptions to online resources. And so there is a ton of material and I studied that. I've got those 5 binders I think up at the top (pointed to shelf). Have I read every word? No, but it's umm.. those were sort of the primary ways of learning.

They continued,

I'm also fortunate.. To that point, I'm also fortunate to be in a role where it's pretty important that we ya know, get it right and stay up to date.

Participant H described a self-directed strategy they used, which was asking lots of questions,

I'll ask my boss lots of questions or other people that may have had a hand in it. For like accounting, if it's something they've dealt with, how they may have on their end what they used, what information they would receive just so I would know that I'm submitting the right information, or processing everything correctly, and so more just trying to get a grasp of what the previous person did and just trying to get comfortable with it.

Participant B described the same strategy of asking questions, even if they did not get answered.

They wanted answers to questions that not only would allow them to do their job, but also help them move other tasks to other people. They mentioned:

The first thing they try to do is identify, you know, what's absolutely necessary in the next two weeks and just getting it done right. And, you know, what can I do to basically keep other people moving and off my back and no, hey, what does this even mean? What is the schedule even supposed to do, like what was its intention and am I completing it? You know, just to move it on down the line.

This participant described a similar experience, that while they tried to ask questions, they often went unanswered. When asked about issues they were having, Participant G responded,

Part of it is, some of the other departments that had layoffs, and like, ownership of new jobs, that it affects me because I might have a question and they don't, they weren't given proper or left proper instructions, or they don't, the people that used to do it are no longer here so they have no idea how to do it and so it kind of leaves us hanging. They're not familiar with the processes and so it kind of holds up our work because we're trying to figure out who to contact or how we get things resolved. So it's slowed down some process and causes some hiccups because our questions aren't getting answered cause nobody, either they didn't know they were supposed to do that role, or they're just not familiar with it at all.

**High-level Learning.** Another learning strategy that participants expressed using was high-level learning. Since they stated that there was not enough time to train others or learn from others, they utilized this strategy to learn what was needed, or learn just enough in order to complete urgent or immediate tasks. Participant A expressed that they had taken on so many new responsibilities that they felt that they did not have time to fully engage in learning something like they typically would. Instead, they mentioned that they would focus on day-to-day things that needed to be done urgently, and never spent time to thoroughly understand new responsibilities.

Yeah, we took on a lot more responsibilities and I'd truthfully say we're not doing as good of a job. I mean, just as a general comment, more stuff is falling through the cracks right now, just with less time and less attention on the individual thing.

They continued,

I would say I've tried to care less. Umm, as far as if we're just coming to terms with knowing some things are not being done. And then really everyday focusing on what, what needs to get done at this moment and try not to look too far ahead and because with a lack of staff, if you start getting too far out, you're gonna lose focus on what has to be done immediately.

Participant F described how their learning varied day to day, based on what they thought might be an urgent task. They shared that they kept their attention to work at a very high-level and completed things as they came across their desk.

It's just you show up and then whatever pops up that day, that gets high value because that's what's currently on your plate versus being able to say maybe this isn't an area we want to do a lot with, cause it doesn't match our organization's goals.

**Lessons Learned.** Throughout the interviews, participants shared stories that demonstrated the lessons they learned during their experiences of trying to learn after a downsizing. These lessons included being responsible for self, being more efficient, and focusing on day-to-day tasks. Participants expressed that while experiencing learning after a downsizing was out of their control, there were a few things that they could control. As a result of the downsizing, experiencing the changes in the organization, and the changes in their jobs, employees shared the lessons they learned.

***Be Responsible for Yourself.*** One lesson learned that employees shared were being responsible for self. They recognized that they had to focus on what they could control, take care of their mindset, and be responsible for the tasks they were given. When discussing how one participant handled tasks being thrown at them with a quick turnaround time, that they have no experience in, Participant F shared the following:

Well one thing I still use is Headspace. And so I still use that meditation app. Um, and in times of like high stress like that or um, deadlines, something that helps me instead of it being chaos all around me and being like, I don't know where to start on this thing. I'll usually shut my door and do a 10 minute meditation and then open the door. And that helps me really either as I'm meditating and trying to clear my mind instead of constantly being bombarded from different angles.

This employee shared that being able to focus a few minutes on their mindset helped them to feel more capable of managing the things on their list that day, and provided their self some structure.

Participant J shared that they also felt being responsible for self was important. They argued that employees had to make the decision whether they wanted to stay with the company through all of the changes, or if they wanted to leave. They shared that they felt that we live in a time where there is less loyalty to employees by companies and less loyalty from employees to companies. They described it as not necessarily being a bad thing, however:

Some think that is bad, and I don't really guess I think about it in a sense of good or bad.

I think of it as, as just a fact of the time we live in and so we all have to responsible for our own decisions and our own career path.

He went on to share that if employees chose to stay with the company, they should then stay responsible for the tasks and new jobs they were given as a result of the downsizing.

***Be More Efficient.*** Participants shared that another lesson learned was to be more efficient, particularly in how they do their job. Employees expressed that being more efficient taught them to focus on day-to-day tasks. Many shared that because there was no direction or goals from the organization, they learned to not focus on the future of the company, but rather the day-to-day items that came across their desk. Five participants shared that because they were

often given new tasks that either did not have any guidance for new tasks, or there were no remaining employees who had knowledge in these tasks, they learned that they had to be more efficient in the way they worked, rather than wasting time trying to find answers that did not exist. Participants also shared that they often did the bare minimum because this was a way for them to be as efficient as possible due to the lack of time they often experienced as a result of the downsizing. They expressed that while it was often hard to do things in a timely manner, they found that focusing on day-to-day tasks allowed them to be more efficient. When asked to explain this and how the downsizing may have changed the way an employee works or learns, Participant E responded with this:

I think you learn how to be more efficient because you have to, um, I think you learn a little bit of the way. I think you learn what people expect from you and at time only meet that. And I think it can have the negative effect of training you to only do the minimum because either that's all you have time to do, or because you're too apathetic to go all in.

While it was a lesson learned in how employees worked, this participant felt that it was not necessarily a good thing due to causing oneself to do the bare minimum in their job. Participant G expressed the negative impact they felt it had on employees' work,

I think this can really have a large negative effect on your work and your work ethic.... and I think eventually you just get to a point where you just stop and you can't go any further and just like, well this is done (the work).

Participant D expressed it this way,

We're all just doing enough to get by. Which I mean we're kind of just forced into it. We learn enough to get by on a day-to-day basis.

This participant felt that they had so many new tasks being given to them, that they did not have time to really dive into each task and learn everything about something. Instead, they learned what they could on a daily basis in order to complete the tasks at hand.

Participant F shared that there was so much chaos that stemmed from the downsizing, with people stepping into new roles, some of which they may not be prepared for. This caused him and his direct coworkers in his department to change the way they had previously learned and worked. They decided that they had to focus on current tasks.

So the first thing that we try to do is identify, you know, what's absolutely necessary in the next two weeks and just getting it done. And you know what can I do to basically keep other people off my back.

This participant also shared that there was no time to fully understand what was needed in a job task. For instance, if they were given a report that needed to be completed, they were not told what the report was for, or how to complete it. Therefore, they had to figure out how to be efficient in learning how to do it and focusing on just getting it done by the deadline.

### ***Factors that Facilitate or Inhibit Learning in a Downsized Organization***

**Organizational Factors.** Marsick et al. (2009) argue that employees tend to interact with learning with a combination of individual and organizational goals in mind. However, they seem to be more inclined to focus on self and their own personal agendas. They state, "...the context of organizations – culture, structure, processes, practices – plays a key role in enabling or inhibiting the motivation, time, resources, expectations, and rewards for learning" (p. 591). In other words, the employee can have self-determined goals, but the organization in which that employee resides can impact how they act or do not act on fulfilling those goals. This leads directly into the research question of what factors facilitate or inhibit learning within a downsized organization.

***Learning Culture.*** When posed with the question of how a participant would describe the learning culture at the organization, most participants found it easy to answer. Nine out of the ten employees felt that there simply was no learning culture and employees were responsible for their own learning. Only one employee felt that the learning culture was good because the company still provided things like tuition reimbursement. Participant G shared their thoughts on how a learning culture did not exist,

The learning culture, there is none. I feel its non-existent. Umm, I'm not sure that anyone in the company feels fostered. Do you know what I mean, to learn, or think anyone cares about it.

This particular participant had lost a manager and co-worker in their department in the latest round of layoffs. They were left with most of the responsibilities of their department, which in the past had taken several people to accomplish. They had been given more tasks and were left to sort through past employees' notes, if there were any, and relied almost entirely on their own learning in order to do the job and new tasks they were given.

Participant E described the learning culture as self-directed, mentioning that employees were just given tasks and found themselves trying to figure things out on their own:

For me, what I've experienced, the learning culture is you're thrown in, you learn as you go, you know? Um, I feel like, like we used to have training, but not obviously, not for all specific things. Um, I feel like it really is like maybe here is a couple of spreadsheets for you to look at to reference. This is kind of what needs to be done. Yeah, have at it. You know, we'll correct as we go. We don't have the time, or the manpower, you know, to really train and help people learn a certain way. We learn enough to get by.

This participant shared that a lot of the tasks they were given were things they had no experience in. As an employee, they took on various roles within the company, serving as a floater between departments that needed extra help on projects – such as accounting, legal, lease records, and more. When tasked with helping others, they expressed willingness to do so, they just did not feel supported in taking on the responsibilities because they were left to figure things out on their own. They described how they did not have any background training in majority of the tasks they were given and no one had the time to describe the end goals of most of those tasks.

However, while most participants shared in the feeling that they had to figure things out on their own, one participant described how not having a learning culture was not always a bad thing. Instead of being upset that the company did not have a learning culture, this employee chose to look it as a way to do better for their self. Participant E described this,

I feel like sometimes, it's almost like you have to figure it out a little bit. And I don't think that that's always bad because sometimes when you do have to do that, you kind of have to just dive in a little bit, you learn a lot more, and then you're really proud of yourself because you're like 'I mastered it, I'm good'.

This participant expressed that they felt responsible for their own learning, regardless of what was occurring in the workplace, and therefore, found it motivating to learn on their own.

***Leadership and Changes Within Management.*** All participants often brought up the changes in management that they had faced over the last couple of years. While most felt supported by previous management, almost all participants expressed that they no longer felt the same support from new management. Organizational leadership and how that impacted the learning that was taking place was mentioned throughout all interviews. Participant G described it as such,

The whole dynamic of the company, after the investor took over, and this is taking the layoffs out of the equation for a minute, our entire company changed when our leadership changed, because we had a leadership team that encouraged employees, fostered growth, fostered learning, and we lost all of that when the investor took the company over.

This participant also expressed that they felt the leadership changes left a lot of employees uncertain around their future in seeking opportunities to learn and grow within the company.

Participant B confirmed they did in fact feel this way,

I don't recall ever being turned down for seeking opportunities to learn more and become better at my job. However, I am hesitant with this new leadership in place.

When asked to clarify what they meant by hesitant, this participant said that they did not feel comfortable asking to participate in learning opportunities. They mentioned these opportunities consisted of career specific luncheons that were hosted by other companies, and classes that would include a fee in order to get a certification of some kind. This participant said that they did not feel as if the new leadership team was supportive of those endeavors, and feared that they would be ridiculed for asking to spend money on that type of opportunity.

Participant D expressed being under a lot of pressure and felt on edge with a lot of their work due to the new leadership team. They expressed their thoughts as such,

I wish I had a more conducive work and learning environment. So that way if something did fall through the cracks, or if something wasn't done right the first time, it wouldn't be Armageddon.

This same participant shared that with the new leadership team, they felt that they could not make any mistakes in their work; however, they struggled because of the lack of time. They felt there was not any time to learn to do jobs the right way, as they were constantly working on strict

deadlines, so they would just hope and pray that the way they completed the work was the right way. This participant showed clear frustration and anxiousness when discussing this topic.

***Lack of Strategy and Direction.*** The lack of strategy and direction from the organizational level was another theme that emerged from the data. Participants expressed how hard it was to do their job, or even learn how to do a new job because they were uncertain on the organization's goals and what they should prioritize in their daily work. When discussing the organization's lack of strategy, all participants mentioned how this made it difficult to focus on what they should be learning or doing within their job roles. This led to being asked if there was anything they wished they had that would make their job easier, in which all participants shared that if the organization had a strategy or direction for the company, it would make it easier on employees to learn what they should be doing and putting their focus and efforts toward.

Participant I described it like this,

More staff is the easiest, but I mean truthfully I think we could get the job done with the staff we have if we had better organization, and really better communication. I mean I have a hard time knowing what our priorities are, where the organization wants us to go, so because you're not really moving as a group in a general direction, you're in your day in and day out, all your decisions are, just I think, again, not very major because you don't have that unified vision of where we are going.

This participant was a manager prior to the downsizing, and once the downsizing took place, was left with one employee. They were used to having a good understanding of the organizations' goals, as well as their own department goals. However, they felt that because the organization lacked any goals, this inhibited their ability to have their own goals, which then resulted in them not knowing where to focus their learning on their day-to-day responsibilities.

Participant J expressed a similar feeling, mentioning that the disorganization from the company's leadership made it hard to know what to do each day,

It's just you show up and then whatever pops up that day, that gets high value because that's what's currently on your plate versus being able to say maybe this isn't an area we want to do a lot with, because it doesn't match our organization's goals. So without that, you're just disorganized. I think there's just natural disorganization that comes from really a lack of vision from the corporate level.

The lack of strategy from the upper management and board of the company distracted employees and created confusion on what they should be focusing their efforts on. Participant B shared similar feelings and had the following to say about the lack of strategy at the company,

I think the biggest impediment of sort of the lack of, and I don't know how prevalent this is throughout the organization, but again this is from my vantage point, the lack of strategic direction for the company and sort of the uncertainty that has been injected into the company.. by having a new board and new management team, ya know, there's distraction to the organization that comes from that and so things aren't as efficient probably as they could be. And then even if we were more efficient, it's to what end because we don't know what our strategic direction is.

Participant D shared how the lack of strategy by the organization impacted them and made them contemplate what work they were willing or not willing to help with.

There were people who were let go and I don't think that there was a plan for who was going to take over certain roles. So I started to umm, take over a lot of roles that were outside of my scope or out of my list of job duties or expectation when I first took this position. So, it impacted me because I had to start to take on things from other

departments, things that I don't have formal training in, you know, and also things that I kind of knew but didn't really have it down and kind of just learn and take on more things than I intended on taking on. Trying to also figure out how in the world were we going to get certain things done. If I was going to stand in a spot where I'm like, okay, I'll help get this done because I know how to get it done, or if I'm going to let the company figure it out as they should because they made the choice to eliminate these certain positions or these certain roles without doing the research or having a plan on who was going to take over these things.

Many other participants shared in this same sentiment in that they felt the organization did not have a plan in place prior to the downsizings in terms of how work would get completed. With that being said, not one participant described an organizational factor that they felt supported their ability to learn.

The next section will discuss the individual factors that may have supported or inhibited employees' learning.

**Individual Factors.** During the interviews, many participants described reasons why they were internally pushed to continue learning after the downsizing. The concept of self-interest was a common answer once participants reflected on how they continued to do what they needed to do each day and they expressed how this situation could serve their own future and career, regardless of where they were employed.

**Self Interest.** Participant I described how they felt the situation of downsizing and being given more work could serve them in the future:

I mean we all realize everything we've gone through, but we know that it's out of our control. So there comes a point in time where you ultimately are the person who has to

decide whether or not you're going to stay here or leave. So I, I've just decided that if you make that choice to be here, try to think about the bigger picture, especially for us 'cause we're young. Like what can you learn while you're here that may apply to your job that you do decided to go to in five or ten years, you know? Um, it, our careers don't have to die here.

Similar to this participant, almost all participants realized that the downsizing was completely out of their control, and that they should do what they can with the situation they have been given. Participant C found themselves getting a promotion and having to learn new tasks; they described how this situation could serve their future:

Yeah, most definitely it was like, okay well this is a step in the right direction and if I was to leave or anything I could take that and hold that. So just making the best out of the situation for myself.

Participant D described how it was in their best interest to stay and learn their new roles due to having to pay bills and fear of not finding another job if they were to leave:

I think the only thing that kept me kind of staying was you, you have bills you have to pay. I was just like, okay, do you, you don't have to be here forever. Yeah, you do what you gotta do, you know, pay your bills, keep your head down and get it done.

This same participant described how they were given so many new tasks in several departments that they had no experience in, but decided it was best for them to learn what they could and continue to do their best, so that they could keep their job, pay their bills, and have better experience for their future. They mentioned taking on the new tasks that were asked of them so that they could add it to their resume.

*Emotions.* One of the individual factors that emerged as inhibiting learning was emotion. Participants expressed their lack of desire to learn due to the emotions that were a result of the downsizing. Some of the emotions mentioned among the participants were uncertainty, hopelessness, frustration, sadness, and apathy.

*Apathy.* When asked what one would consider their biggest struggle at work and learning, at least four of the participants described the feelings of apathy and how that impacted their learning and their job. Participant J stated this,

Apathy. Just kind of apathy towards the organization after, you know, multiple rounds of layoffs.. you just, I get that sense of you know, you don't feel good about the organization's future. It's really tough to come in and really give maximum effort towards an undefined goal.

This participant also mentioned that because the organization did not have clear goals, it made it difficult to have goals of their own, as they pertained to their job at the company. Participant C expressed that taking on so much work due to the downsizing caused them to feel apathetic towards anything related to work or the company. They mentioned,

I've taken on a lot of work and umm, so probably a little bit more apathetic. However, this same participant expressed that they had not always felt this way. Instead, they expressed being excited and motivated to come to work every day and was always willing to learn something new. After the downsizing, they no longer felt this motivation to learn or help the company succeed in its changes.

*Frustration.* Frustration was another common emotion that was mentioned. Six of the participants expressed feeling frustrated with the company and the management team. Participant J shared that they were frustrated because the company lacked any direction, yet they would be

given more and more work to do without any help or training on how to do it. This employee was so frustrated with the situation that they expressed that often times they just did not complete certain work because they did not understand the end goal. Participant F simply stated:

I think just the frustration with the organization; that can fall into a problem, yeah just frustrated with management and the organization.

This participant felt that frustration with the company could fall into a problem because, as another participant shared, the learning of new tasks and completing tasks suffered as a result. One particular employee, Participant H expressed how they were frustrated because they had moved departments several times and would continue to get old stuff from their previous departments that they had no knowledge of. Just because they worked in a particular department sometime, stuff would just get passed off to them to try and learn.

I think that's one of the things, it's like so frustrating. Cause when I was in this other department, I coded invoices. I knew what was going on. And then when I moved into this other group, my day to day was invoices. That's what I did for I guess a year, day in and day out. Nothing but invoices, nothing but coding invoices. So now I'm in a completely different department, where I don't code invoices for anyone, and AP still sends me some of the invoices from my old department, where we don't have anyone to code it. They ask, can you code it? And it's like, I literally don't know what this stuff is. It's really frustrating.

This participant also shared that this frustration stemmed directly from the downsizing. They mentioned that the downsizing caused so many changes; it was hard for them to keep up with the new job they had to learn, while being bombarded with questions about their old job. They expressed that the frustration led to a lack of desire to learn their new job.

## **Conclusion**

In this chapter, I have presented the findings of the study. The findings show that a lack of time, reallocation of work, and the loss of their learning network trigger the informal learning process. The findings also show that layoff survivors do engage in informal learning in a downsized organization through means of self-directed learning, such as learning by doing and asking questions, and focusing on high-level learning. Throughout this experience, layoff survivors learned that being responsible for one's self and being more efficient was an essential way to get their job done. They also learned that the learning culture was a trickle down effect and that it was important to be more efficient in learning and in their work tasks. There were no organizational factors that facilitated learning. Organizational factors that inhibited learning were the lack of a learning culture, changes within management, and the lack of strategy and direction of the company. The individual factors that facilitated learning was employees' self interest in how the learning could benefit them. The individual factors that inhibited learning were emotions that employees felt after the downsizing, such as apathy and frustration. The next chapter will provide a thorough discussion of these findings.

## CHAPTER SIX: DISCUSSION, IMPLICATIONS, FUTURE RESEARCH, AND CONCLUSION

This chapter will provide a review of the research purpose, research questions, and methods for the study. It will also include a discussion of the research findings, how they answer the research questions, how they relate to the research in the field, and demonstrate the gaps that were found in the theoretical model that was used in an effort to further develop the model. Lastly, it will discuss limitations of the study and opportunities for future research.

The purpose of this study was to understand how layoff survivors engage in informal learning after a downsizing. The study sought to fill the gap that exists in research, which lacks the explanation of how layoff survivors participate in learning after a downsizing. In order to guide this study, the following research questions were posed:

1. How do layoff survivors engage in informal learning within the context of downsizing?
  - 1a. What are the triggers that initiate the informal learning process?
  - 1b. What are the learning strategies that are used?
  - 1c. What are the lessons learned?
2. What are the factors that facilitate or inhibit learning in a downsized organization?
  - 2a. What organizational factors support or inhibit learning?
  - 2b. What individual factors support or inhibit learning?

In conjunction with these questions, a qualitative case study, as defined by Merriam (2007), was chosen as the research method for this study. This case study consisted of one research site, which was chosen due to the recent layoffs and organizational changes it had experienced. The primary method of data collection was through semi-structured interviews, however, field notes and observations were also collected. Data analysis was conducted with Charmaz (2014) theory

of coding guiding that process. Through this process, several key findings emerged. These findings will be discussed in greater detail below.

### **Discussion**

Research shows that informal learning accounts for at least 80% of workplace learning (Ellinger & Cseh, 2007). Marsick and Watkins (1990) argue that informal learning naturally occurs in the workplace, stating that when the need to learn is the greatest, people will learn through interaction with others in their daily environment. With this knowledge and the lack of research on how layoff survivors engage in informal learning, this study was guided by the concept of informal learning, particularly Marsick et al.'s (2006) reconceptualized model of informal learning. As mentioned above, the overarching research question in this study was how do layoff survivors engage in informal learning within the context of downsizing? In order to answer this question, it is important to understand the triggers that initiate the learning process, the learning strategies used, and the lessons that were learned. Secondly, it is important to understand what individual or organizational factors facilitate or inhibit learning in a downsized organization. Understanding these questions will help tell the story of how layoff survivors engage in learning. For this reason, the discussion will follow the Marsick et al.'s (2006) theory of informal learning, describing the triggers, learning strategies, and lessons learned, while also considering the organizational and individual factors impacting the learning. In order to thoroughly explain the findings in relation to the theoretical framework that was utilized, it is best to discuss these results as they relate to each other, and as they influence one another (Marsick et al., 2006). Therefore, while this theory is not meant to be linear or cyclical, this section will provide a discussion that encompasses this theory and furthers the understanding of these concepts within the context of downsizing.

The findings of this study support the previous research that has been conducted on informal learning in the workplace with regards to the strategies that learners' use, the lessons that they learn, and the types of informal learning that they partake in (Marsick et al., 2006; Marsick & Watkins, 1990; Tough, 1979). The findings also provide important insight into this understudied topic, demonstrating how complex this situation is for layoff survivors. This section will first include a discussion of the major themes and end with a discussion that answers the question of how layoff survivors learn.

### **Layoff Survivors' Learning Process**

Throughout the analysis of the themes that emerged from the participants' interviews, it became clear as to how the factors that triggered learning also influenced the learning strategies that were used, as well as the lessons that were learned. The triggers of lack of time, reallocation of work, and loss of learning networks all influenced the learning strategies of self-directed learning and high-level learning. These learning strategies seemed to be a direct result from the employees' learning that they had to be responsible for their selves and they had to be more efficient in their work. This section will discuss the learning process of layoff survivors in a downsized organization.

The triggers for the layoff survivors' informal learning all seemed to stem from the downsizing event. Almost all participants mentioned that the lack of time was a considerable factor in their attempt to learn on their own. The lack of time was multi-faceted for each employee as well. With more work given to employees and a lack of time to get help from others, employees described being forced to take up learning on their own (Sadri, 1996). Participants also mentioned the loss of their learning networks as a major factor in their inability to learn as quickly as they normally would. Many researchers have argued that the loss of

learning networks disrupts the learning capacity of an organization (Hornstein, 2009; Reynolds-Fisher & White, 2000; Susskind, Miller, & Johnson, 1998). The participants in this study appeared to agree with this sentiment, as they expressed multiple times the difficulty they found their job and new roles without having their usual learning network in place. While losing their learning networks seemed to create more work, it also seemed to enable the self-directed learning that employees partook in. Instead of being able to rely on others for information, this caused them to learn things on their own.

Layoff survivors expressed the lessons they learned through this experience. These included being more efficient and being responsible for one's self. As a result of the lessons employees learned throughout their experience, they expressed utilizing strategies such as focusing on tasks at a very high-level, asking questions when they could, and participating in self-directed learning. As Confessore and Confessore (1994) mentioned, self-directed learning is based on a person's willingness and motivation to learn. When employees saw the downsizing experience as an opportunity to learn more for their own self interest, whether it was for adding skills to their resume, or strengthening their knowledge for their future career, they seemed more likely to engage in self-directed learning. These participants described the act of asking questions and researching online resources as examples of the learning they engaged in. Furthermore, while asking questions was used as a learning strategy, it was also a hindrance in being able to learn. This could imply that sometimes the learning strategies used are not always successful as a result of the factors that inhibit learning. Therefore, it could be argued that while employees found their own strategies to utilize to try and learn, they were not always the best strategies due to external factors, such as the disruption in the learning network due to the downsizing.

Employees also engaged in high-level learning as a learning strategy, where they cared less about the quality of work due to the time constraints that they faced. Employees described feeling responsible to learn the new tasks they were given as quickly as possible because there was no time to really spend thoroughly learning something. When work had to be reallocated and departments were shuffled around, this put some employees in a position of having new tasks in areas that they had no experience in, while others were put in charge of an entire department they had no knowledge of. While employees expressed frustration in these changes, they also seemed to appreciate the fact that they still had a job. This ultimately resulted in employees taking these new responsibilities and turning it into an opportunity to learn for their own interest. In fact, at least half of the participants shared that while they felt overwhelmed with the new tasks, they decided to take it as a way for them to learn more and gain more experience for their future career, regardless if that career was with this company, or elsewhere. As a result, these employees learned what they could, even on their own terms, and decided to take the reallocation of work as a way to inspire learning on their own. With that being said, the employees' individual goals seemed to evolve after the downsizing. Instead of focusing on how employees could work towards advancing their career at the current company, they began thinking about what they could do with the current situation in order to serve their career somewhere else. With this mindset, employees appeared to be motivated to learn just based on the fact that it could serve them individually. They no longer felt supported by the organization and did not know the future of the company; therefore, they changed their goals to fit in line with the day-to-day work that they were focused on. Rather than focusing on the changes of the company and what it meant for their future, they focused on learning what they could in order to further their career elsewhere. While one could argue that this is great from an individualistic perspective, it may or

may not be considered effective from an organizational perspective. When an individual begins working with their own interest and motivations in mind, the change that the organization is trying to implement may become less important to the employee, in which case could lead to an unsuccessful change initiative (Confessore & Kops, 1998). Additionally, these findings contradict Merriam et al.'s (2007) findings that state employees learn for the benefit of the organization in order to help adjust and adapt to the environment. It also contradicts Confessore and Kops (1998) argument that individuals learn and then transform this knowledge into a more collective learning in order to benefit the organization. While both of these studies were mentioned in the organizational learning definition part of this study, and I noted that I would not be using the organizational learning definition, it is worth noting the contradictions these findings have to the research on organizational learning. I would also argue that research into organizational learning should consider how changes within the company could potentially impact the desired learning behaviors of individuals, such as shown in this study. Furthermore, Marsick et al. (2006) mention that learners interact within a mix of individual and organizational goals. However, with this study, participants expressed there being no organizational goals, and if there were any goals, the organization did not share that with the employees. This led to employees establishing their own goals, which were all self motivated and mostly consisted of getting work done fast and learning what they could for self fulfilling purposes. With these findings, I would also argue that employees created their own organizational goals in their attempt to try to understand what the organization wanted to accomplish. In other words, with the downsizing creating a lack of staff and time to complete work, employees seemed to assume that they should focus on daily tasks and doing a little bit of everything, rather than focusing on any longterm projects. Instead of working towards the collective good of the company,

employees worked solely for their selves. Furthermore, having a clear strategy and direction of the company's goals was important to most participants. They felt that it was hard to focus on learning, or what they should be learning because their time consisted of just trying to keep the day-to-day business running. As a result, instead of focusing on long term learning goals, they were forced to focus on quick learning, in order to complete tasks for a particular day.

While asking questions was another learning strategy, it seemed to also be a hindrance in being able to learn. While some employees expressed asking lots of questions, they also shared that those questions often went unanswered, which resulted in them trying to find other ways to learn. Because Marsick et al.'s (2006) informal learning model is iterative, this does support their explanation that learners will take strategies that do not work and return to the drawing board to find something else that will. However, with the complexity of the layoff survivors situation, they often lacked the time to find other avenues of learning strategies, so sometimes their unanswered questions resulted in no learning occurring and work being left undone. Therefore, I would argue that a discussion exploring how learners cope with learning strategies that are not successful is worth including in future models.

Marsick et al. (2006) argue that the context of organizations plays a key role in enabling or inhibiting learning. When it came to discussing the organizational factors that may have supported learning, there was no direct mention of this and after analyzing the data, there were no indications that employees felt supported or fostered in learning. All participants agreed with the sentiment that at the time of the downsizing and this study, there were no organizational factors that were supporting their learning, but instead all of the organizational factors pointed to inhibiting the employees' learning. With that being said, a factor to point out is because of the lack of a learning culture, time, and direction, employees were put into a position to learn on

their own what they needed to learn for their new daily tasks as a result of this. In other words, they were responsible for deciding what they needed to learn, how quickly they needed to learn it, and how they were going to learn it. Therefore, the lack of organizational factors could be argued as an indirect support factor that triggered employees' learning, but did not necessarily foster or support that learning.

Even though employees' emotions were a factor that inhibited learning, based on the findings of this study, it could also be argued that the emotions were a result of the organizational factors of lack of strategy, changes in leadership, and the lack of a learning culture. The employees expressed feeling these emotions because of those organizational factors. Ultimately, these findings suggest that these factors directly impact one another. While it was beyond the scope of this study to consider the emotional impact of learning after a downsizing, it is worth discussing what the research says about this factor thus far, for the simple fact that emotions did appear in the findings. Scherer and Tran (2001) argue that both positive and negative emotions impact learning. In this study, it seemed that the negative emotions of apathy and frustration impacted the learning of survivors in various ways. Survivors expressed feeling apathetic towards their work, which caused their lack of motivation to learn new tasks they were given. Antonacopoulou and Gabriel (2001) directly state that these issues are a clear result of the downsizings that occur in organizations. They also suggest that when employees are impacted in this way, this then leads to the organization failing at change they are trying to implement. Ultimately, the results in this study show that the change the organization was trying to implement was failing, as layoff survivors seemed to have lost loyalty to the company and were mostly interested in self-fulfilling goals.

While the organization was a main factor in this study and served as the context in which this study was interested in, the results appear to lean towards the fact that learning is still very individualistic within this context. While the external factors of the downsizing certainly impacted the way employees learned, what they had to learn, and how they learned it, the motivations to learn were influenced by the employee. When employees felt that the downsizing was an opportunity for them to learn all that they could in order to better serve their future, they were more likely to engage in self-directed learning activities. While all participants expressed feeling responsible for their own learning, not all participants felt that they could use this experience as an opportunity to prepare themselves for advancement in their careers at other companies. Employees seem to adjust to learning based on what is happening within the context they are situated in, but based upon the findings of this study, they seem to lean towards instances of self-directed informal learning to help them through the changes of the organization.

These findings suggest that while there were learning strategies that the employees utilized, these learning strategies were often negatively impacted by the organizational factors due to the context of downsizing. While the Marsick et al. (2006) model includes discussion on the organizational factors that support or inhibit learning, it lacks the discussion on how organizational factors impact individual factors. For this reason and as a result of this study, I argue that this model should include a framework that provides guidance on how organizational factors impact individual factors, which could lead to a lack of learning taking place, or alter the processes that learners go through.

### **Layoff Survivors' Informal Learning Practices**

Layoff survivors did report participating in informal learning and these findings show that layoff survivors learn through two modes of informal learning. That is, through self-directed

learning and incidental learning (Long, 1994; Marsick & Watkins, 1990). Layoff survivors talked in great detail regarding the self-directed learning they engaged in, such as asking questions and researching answers. Tough (1979) argues that self-directed learners decide what they will learn, how they will learn it, and when they will learn it. The learning behavior of participants in this study seemed to align with that. When survivors were given new tasks to learn, they had to decide what piece of those tasks they would learn in order to complete them as quickly as possible due to the strict deadlines they had to meet. They did not have anyone to rely on in order to teach them, so the responsibility of how they would learn to do it was left up to them to decide. Furthermore, Confessore and Confessore (1994) argue that self-directed learning is based on a person's desire to learn, which includes motivation and readiness. This study's findings align with that, in that survivors were internally motivated and had a desire to learn when they saw the opportunity to use it in their future endeavors.

Incidental learning was another form of informal learning that layoff survivors engaged in. While people are not always conscious of incidental learning occurring, this type of learning can be the result of mistakes made or by trial and error (Marsick & Watkins, 2001). Participants shared the trial and error learning that occurred after the downsizing. One participant mentioned that this frustrated them because it took too much of their time to learn something after the fact of completing a task. Another participant mentioned that they would learn mistakes were made after passing the work off to the next person, and instead of being told what or how to correct it, they were left to learn what they did wrong on their own. The participants did not seem to acknowledge the type of incidental learning they were participating in, but described it more as a 'figure it out on your own' type of concept. Only one participant seemed to like this concept, mentioning it made them feel good when they were able to learn something on their own.

Overall, one of the significant findings of this study was the unveiling of the complexity of the informal learning process of layoff survivors as they navigated not only the learning process, but also the challenges of the downsized organization. Through discussion of these themes and the modes in which layoff survivors learn, it is hoped to bring new insight into an important component of workplace learning during changes.

### **Implications**

The implications of this research study apply both from an academic and practical standpoint. This section will discuss these implications.

#### **Academia**

First, to elaborate on the academic contributions, while the topic of organizational change and workplace learning is not new to the academic landscape, up until this study, research lacked the discussion specifically regarding how layoff survivors learn after an event such as downsizing. This study fills that current gap in the research by analyzing how layoff survivors engage in informal learning after such an event. This is important to consider in a time where organizations are striving to become or remain competitive in a constantly changing economy, but are also faced with decisions, such as downsizing, that inhibit the learning that takes place within a workplace (Hornstein, 2009; Reynolds-Fisher & White, 2000; Susskind, Miller, & Johnson, 1998). This case study provides researchers new insight into this understudied phenomenon, with hopes to inspire discussion and more questions regarding layoff survivors' learning behaviors.

#### **Practice**

From a practical standpoint, the contribution of this research is as follows. First, by now having a basic understanding of how layoff survivors engage in informal learning, organizations

can begin to explore options to providing the support and resources that are desired by layoff survivors after going through such an experience. This study also identified the issues and challenges layoff survivors faced after the downsizing in relation to learning, while also exploring how they engaged in informal learning. This insight into layoff survivors' learning behaviors, while adjusting to organizational changes, particularly a downsizing, can help inform organizations how to mitigate specific challenges during times of change. Some ideas that organizations could consider are informational guides to departments or desk procedures for certain tasks. These ideas could be implemented long before a downsizing occurs. They could also be implemented at the managerial level. From a human resource/relations development perspective, this research demonstrates the desire that employees have for a workplace environment that provides practical ways to enhance their learning experiences, even during times of organizational changes. Therefore, human resources could play a role in advocating for employees through the organizational changes and work towards gaining support and buy in from the upper level management team to establish a learning environment where employees feel fostered after a downsizing.

### **Limitations**

While this study offered new insight into how layoff survivors learn in a downsized organization, it did not come without limitations. There were several limitations in this study, including only having a small group of participants, participants who had experienced multiple layoffs and organizational changes, and that this study only provides insight into one particular organization. With only ten employees volunteering and participating in the study, this limited the experiences to this small group of participants. Being able to have more participants in this study would have provided an even more thorough study of layoff survivors' learning behavior.

Even with multiple recruitment emails, some employees expressed reluctance in wanting to share their story as they were trying to exit the company. However, even with this smaller amount of participants, they were from different departments, which did allow for different experiences to be discussed. Another limitation of this study was that most of the participants had survived multiple rounds of layoffs over the last five years prior to this study. While it certainly gave the layoff survivors a lot to discuss, it was discovered that many survivors felt a certain way about learning and their job due to not just the most recent layoff, but the one's prior to that as well. This could have impacted the experiences they shared, as many expressed feeling more apathetic towards the last layoff, which was discussed in the findings section. While I did consider that several participants had experienced multiple layoffs, because of the limited number of participants volunteering, I decided that I could not eliminate participants based on just this factor, but rather acknowledge it as a potential factor impacting findings. Collecting data from participants who had only experienced the latest round of layoffs could have potentially produced different findings. Lastly, this case study only focused on one particular company in one specific industry, which limited the findings to this company. However, due to the fact that this topic has not been thoroughly addressed in research, it was beyond the scope of this study to conduct research at multiple companies, and rather focus on one specific company to gain insight that would hopefully lead to more research at more companies regarding this topic. Also, some of the organizational factors that participants expressed impacting their learning was a great indicator that this particular company could likely have different findings from other companies.

### **Future Research**

This study was a qualitative study that was focused on gaining insight into the experiences of layoff survivors' learning after a downsizing. Through interviews and

observation, there were several key findings that will be insightful to the research community, as well as to future research. Future research should consider expanding this study to include multiple organizations in a case study. This would help further the findings of various organizational factors that can impact learning after a downsizing and provide a more thorough analysis on this topic. Future research should also include more participants to expand the collection of data to even more firsthand experiences. Due to the fact that this study focused on the self reported experiences of layoff survivors through interviews, future research could help strengthen this study's findings through other data collection methods, such as surveys and questionnaires. Lastly, longitudinal studies would be helpful in understanding the various factors that may lead up to employees feeling a certain way about a company once a layoff occurs.

### **Conclusion**

As the economy progresses, layoffs in organizations will continue to be inevitable. Layoff survivors will continue to be tasked with more work than they can handle; they will continue to experience a loss of their learning networks, and their learning will continue to be impacted by the changes of the organization. However, due to the gap in research that has not explored how layoff survivors learn after a downsizing, this study sought to provide insight into this in order to promote future discussion of what organizations can do to lessen the negative learning impact that downsizings tend to have. Furthermore, the findings of this study also contribute to the literature of how downsizings impact layoff survivors, and further the discussion on workplace learning in various contexts. With that being said, there are still gaps that exist within the literature and questions that are still left to answer. Future studies should continue the effort of exploring how downsizings impact learning and what organizations can do to lessen the negative learning impact.

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## Appendix A

### Email Requesting Approval from SVP of HR

Hi [Director of People and Culture],

As you know, I am a PhD candidate at the University of Oklahoma in the Adult & Higher Education Department. I am currently conducting a study that examines how informal learning can occur in a downsized organization. I am reaching out to you to ask for your permission to recruit employees of XX to participate in this study. I will inform employees that the decision to participate is completely at their discretion and will have no impact on their employment with XX. Any employee's decision to participate will remain anonymous and anything shared between the participant and me will remain confidential.

This study has been reviewed and approved by the University of Oklahoma Human Research Participant Protection Committee.

Please let me know your thoughts and if this study will be permitted. If you have any questions or concerns, please feel free to let me know.

Thank you,

Sarah Miller

## Appendix B

### Recruitment Email to Participants

*The University of Oklahoma is an equal opportunity institution.*

Hello,

My name is Sarah Miller and I am a PhD candidate at the University of Oklahoma in the Adult & Higher Education Department, as well as a colleague of yours at XX. I am currently conducting a study that examines how informal learning can occur in a downsized organization. Therefore, because you are an employee who has recently experienced a downsizing of an organization, I am reaching out to ask you for your participation in this study. I have contacted the Director of People and Culture and received approval to conduct this study.

Participation in this study is completely voluntary. It is not being required by the organization and your participation is your decision. Whether or not you choose to participate in this study will have no impact on your employment with XX. Your participation in this study will remain anonymous. Anything shared during the interview will remain confidential between you and me.

Participation in this study involves one round of interviews that will be conducted by me. In some cases, there may be potential for one follow up interview to take place. The interviews will last approximately 60 minutes and will be conducted either in your office at work, or in any other place you feel most comfortable. This can be discussed if you decide to participate.

Your time and participation in this study will be greatly appreciated. However, there will be no compensation for your participation.

This study has been reviewed and approved by the University of Oklahoma Human Research Participant Protection Committee.

If you are interested in participating, please respond to this email with your decision to do so within one week from receiving this. If you do not wish to participate, you do not need to respond. Once I receive a response from you stating that you would like to participate, I will send you an email with more information to schedule a time for the interview.

Thank you for your time and consideration. I look forward to hearing from you!

Sincerely,

Sarah Miller

## Appendix C

### Interview Protocol

#### Semi – Structured Interview Questions

- Can you describe what you do at the company?
- Can you walk me through a typical day at the office?
- What happened in your company during downsizing?
- Can you describe how your job has been impacted by the layoffs?
  - In what ways have you dealt with that? <sup>1</sup>
- What are some problems you have encountered since the layoffs?
  - Can you identify the sources of those problems? <sup>1</sup>
- Can you identify a specific challenge or difficulty that you have encountered in your job responsibilities?
  - Can you describe the process of working through that challenge? <sup>1</sup>
- How would you describe the learning culture in this organization?
- How have the layoffs impacted your relationships with co-workers or managers?
- How would you describe the support of other co-workers who are still employed here? Is there anything you wish you had that would make it easier to do your job?
- What is your biggest struggle that you have at work?
  - Have you overcome this and if so, how? <sup>1</sup>
- How has the downsizing changed the way you work?
- After going through this experience, what advice would you give to other employees who have just gone through downsizing at their company?
- Is there anything else you would like to share or feel like I should know?
- Is there anything you would like to ask me?

<sup>1</sup> 'Ready' Probing questions.