

**The Role of Expectations and Perceptions of Service Quality  
in the Evaluation of Corporate Education Programmes**

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## **Abstract**

Corporate education has become an important component of the university business school agenda. An essential ingredient of corporate education is the desire to create value for employees and the wider organisation. The search for value has been reflected in attempts to measure outcomes and return on investment. However, despite these efforts some academics and practitioners have become sceptical of this approach, arguing that less measurement is happening within organisations than one might think and that sponsors of corporate education may not be as wedded to proof of return on investment as many HR professionals assume.

This study aims to evaluate a new approach to the search for value within the corporate education context, namely the evaluation of expectations and perceptions of service quality. Whilst the study of expectations and perceptions has been well documented within the service quality literature utilising survey questionnaire instruments such as SERVQUAL, SERVPERF and HEdPERF, they have largely focused on open education programmes. They have failed to address the context of corporate education. This study seeks to adapt existing service quality approaches and apply them into a new field of investigation, namely corporate education. Corporate education is 'conceptually' different to open education, resting on a utilitarian foundation with roots going back to the work of Locke, Durkheim and Dewey (Locke, 1778; Durkheim, 1893; Dewey, 1918) and informed by several approaches to learning which include experiential learning, work-based learning, action learning and problem-based learning. These foundations have led to the creation of a different teaching and learning strategy to that offered in open education including a high level of contextualisation to the workplace and a strong emphasis on project work and mentoring. Corporate education is also 'practically' different to open education. It is closed or semi-closed in nature, it involves a complex set of relationships between the university and the organisation and it requires a unique learning and teaching strategy.

This research study is founded on a pragmatic paradigm and follows a sequential, cross-sectional, mixed methods design with three main stages. Stage one involves a series of initial interviews with key stakeholders in four contemporary business organisations, with the aim of investigating their expectations of corporate education. Stage two utilises a questionnaire with Likert-scale questions to measure the gap between expectations and perceptions for corporate programmes. Stage three involves follow-up interviews designed to interpret the results and suggest improvements to the corporate education provision. The sampling approach follows a purposeful, homogeneous pattern aimed at specific stakeholder groups. Analysis of the stage one and stage three qualitative results is derived by means of a first cycle, second cycle coding approach. Analysis of the stage two quantitative results is derived by means of descriptive and inferential statistical analysis.

The results indicate that expectation dimensions for corporate education are different from those of open education programmes and include seven key dimensions, namely organisational support, university support, return on investment, career development, collective learning, credibility and partnership. An analysis of gap scores between expectations and perceptions indicates that the organisational support dimension presents the greatest area of concern within the corporate education provision. It is also clear that expectations vary according to different stakeholder groups, which include programme participants, learning and development managers, line managers and senior managers. A further key finding is that expectation scores are higher than perception scores and therefore the notion of 'return on expectations' is not a helpful concept. Finally, the results indicate that the survey instrument utilised in this study is perceived by organisational stakeholders as a valuable tool in the evaluation of corporate education programmes.

The research study makes a contribution to knowledge in three respects. Firstly, it applies service quality concepts into a new context, namely corporate education. As such it demonstrates that specific service categories, such as corporate education are conceptually and practically different from

other service categories within an industry or sector and require a unique application in their own right. Secondly, the research study focuses on the role of several stakeholder groups in the assessment of service quality, in contrast to traditional studies which tend to assess the relationship between one service provider (normally a university or college) and one customer (normally the individual student). As such it highlights the importance of evaluating the expectations and perceptions of a range of stakeholders within the education process. Finally, the research study has suggested a new survey tool with potential to make a valuable contribution to the evaluation of corporate education programmes within contemporary business organisations.

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## Chapter One – Introduction

### 1.0. Introduction

*Synopsis: This chapter introduces the research problem and highlights the gap in knowledge that this research study seeks to address. Key terms in the research study are defined, the research methodology is elaborated and the units of analysis are introduced. The research objectives and questions are also clearly presented. Finally, the chapter concludes with an overview of the forthcoming chapters.*

### 1.1. The Research Problem

Organisations have traditionally spent large sums from their budgets on business education with little measurable or perceived long term impact on organisational effectiveness.

*“There is a paradox at the heart of Western corporates, and it is this: while many organisations plough thousands of dollars to train their employees, many managers don’t think it is worthwhile” (Development & Learning in Organisations, 2008, p34).*

The challenge facing all university business schools and corporate organisations alike is this: how do you ensure that education within the workplace is creating value for employees and the wider organisation? The search for value has grown to such a level of importance within many organisations that it has become learning and development’s ‘holy grail’ (Redford, 2007b, p1).

The search for value has been reflected largely in attempts to evaluate education through the measurement of outcomes. A variety of models have been created with the aim of providing clear evidence that education and training have created tangible and measurable benefits for the organisation (Hamblin, 1974; Warr, Bird & Rackham 1970; Kirkpatrick, 2007). More recently these attempts have led to the desire to measure return on

investment (ROI) for education and training in financial terms. In the US and UK ROI has been measured within the private, public and non-profit making sectors (Phillips, 2003, p24).

Whilst the concept of measuring the value of education within the workplace and its associated return on investment has been popular with some writers, others have grown more sceptical about the use of measurement as an approach. Kearns (2003, p65) warns against an “American obsession” with trying to measure return on investment. Charlton and Osterweil (2005, p13) have suggested that, in the UK, less return on investment measurement is happening than one might think and that sponsors of executive education may not be as wedded to proof of return on investment as many human resource professionals assume. This view is also taken by Bentley (2006, p1) who recognises that whilst human resource professionals may be keen to measure return on investment, chief executive officers and managing directors may be more concerned with maximising the education and ensuring that it is applied.

## **1.2. A Gap in Knowledge**

The current scepticism about measurement of value raises the question as to whether a new approach may be more beneficial for future research, namely the evaluation of expectations and perceptions of service quality. The evaluation of expectations and perceptions may help to address the perspectives of a variety of different stakeholders and the complex phenomena that surround the evaluation process. This approach may be a better lens through which to investigate the rich variety of personal, cultural and political dimensions that lie deep within the fabric of the organisation. It is this new approach that this research study sets out to explore.

A clear gap in knowledge has been identified in this study. The evaluation literature has focused mainly on outcomes and return on investment and has largely failed to address the ‘softer’ issues of expectations and perceptions in the corporate education process. Whilst many corporate education programmes have included ‘happy sheets’ which ask students to evaluate

their perspectives on particular modules or topics, little research has been implemented to investigate the detailed expectations and perceptions of multiple stakeholders, including those of the learning and development team, line managers and senior managers within the organisation. Furthermore, little research has been conducted to investigate the gap between expectations and perceptions and to determine whether the concept of 'return on expectations (ROE)' might have any value within the evaluation process.

The study of expectations and perceptions of service quality itself is not new and has been well documented within the service quality literature. Survey questionnaire instruments such as SERVQUAL and SERVPERF have been utilised in a wide variety of sectors and industries. HEdPERF has also been utilised within the higher education sector. However, research studies of this kind have largely focused on open education programmes, mainly at undergraduate level. They have failed to address the context of corporate education as a topic worthy of study. Trafford and Leshem (2008, p16) state that one example of doctoral studies involves the application of conventional research instruments into new fields of investigation. This research study follows this approach. The aim is to modify and adapt existing service quality approaches and apply them into a new field of investigation, namely corporate education.

### **1.3. Definition of Terms**

As indicated, the focus of this research study is the role of expectations and perceptions of service quality in the evaluation of corporate education. It is helpful at the outset to attempt a brief definition of these terms. The terms are defined briefly here, but are developed in more depth later within chapters two and three.

#### **1.3.1. Expectations**

Expectations are defined in general terms as "a strong belief that something will happen or be the case" (Oxford English Dictionary, 2009, p1064). Within

this research study however, expectations may be defined more narrowly from the service quality literature as “pre-trial beliefs about a product or service and its future performance”. Customers develop expectations on the basis of many sources of information including prior exposure to the service, word of mouth, expert opinion, publicity and company communications (Boulding, 1993, p9).

### **1.3.2. Perceptions**

Perceptions are defined in general terms by Brooks (2009, p52) as “how we view and interpret the events and situations in the world about us” and by Robbins (2003, p123) as “the process by which individuals organise and interpret their sensory impressions in order to give meaning to their environment”. In this research study however, perceptions may be defined more specifically from the service quality literature as post-trial beliefs about the actual service received. Teas (1993, p18) refers to perceptions as “consumer beliefs about the service” or “experienced service”.

### **1.3.3. Service Quality**

Parasaruman et. al. (1985, p42) state that “service quality is a measure of how well the service level delivered, matches customer expectations”. Pariseau and McDaniel (1997, p206) argue that the term has evolved from “quality is excellence, to quality is value, to quality is conformance to specifications, to most recently, quality is meeting and/or exceeding customer expectations”.

### **1.3.4. Evaluation**

Bramley (1996a, p4) states that “evaluation is a process of establishing the worth of something”. Thackwray (1997, p4) has a similar definition suggesting that evaluation is “finding out and agreeing if what you are doing is worth doing, if you are doing it well and how you can do it better”. Easterby-Smith (1994, p13) recognises that there are four general purposes for evaluation.



Firstly, 'proving' which aims to demonstrate conclusively that something has happened as a result of training or developmental activities. Secondly, 'controlling' which determines whether the training is going to plan. Thirdly, 'improving' which implies an emphasis on trying to ensure that the current or future programmes and activities become more effective for the future. Finally, 'learning' which recognises that evaluation cannot be divorced from the processes on which it concentrates and is an integral part of the learning and development process itself.

### **1.3.5. Corporate Education**

Corporate education is capable of wide definition and may include courses implemented by organisational learning and development teams, consultants, educational institutions or professional bodies. Prince and Stewart (2000, p207) define corporate education more narrowly as an activity that takes place within the higher education sector. Corporate education includes "any award or non-award bearing programme of study that is developed and run by a university with the involvement of a company or group of companies".

In this research study, the corporate education programmes are of a particular nature. They all involve programmes that are award bearing, either at undergraduate or postgraduate level, within the higher education sector. They are bespoke to a particular organisation and in this sense they are 'closed' rather than open programmes. They all involve face to face delivery. Finally, all the corporate education programmes involve a partnership between Lord Ashcroft International Business School at Anglia Ruskin University and each individual organisation.

## **1.4. Methodology**

The research is founded on a pragmatic paradigm in the belief that this will provide the best chance of eliciting clear answers to the research questions (Cresswell, 2011, p44). The research design follows a sequential, mixed methods design (Cresswell, 2011, p87) which includes three main stages.

Stage one involves a qualitative approach and is comprised of a series of initial interviews with key stakeholders in four business organisations, with the aim of investigating their expectations of corporate education. A key purpose of these interviews is to elicit dimensions and statements for the survey questionnaire at stage two. Stage two involves a quantitative approach and utilises a questionnaire survey to measure expectations and perceptions of service quality for corporate programmes. A key aim of this stage is to determine the gaps between expectations and perceptions for a variety of dimensions and elicit areas with high gap scores that might be considered areas of concern. Stage three involves a further qualitative approach which aims to follow-up the findings of the questionnaire and interpret the results with a view to making improvements in the service quality of the corporate education provision.

The sampling approach undertaken in this research study follows a purposeful, homogeneous pattern aimed at specific stakeholder groups (Saunders et al, 2009, p232). Purposeful sampling enables the researcher to use his judgement to select cases that would best answer the research question(s) and meet the research objectives. The homogeneous groups include the students on the programme, the learning and development team, the line managers and the senior management team. All four groups are involved in the research at stages one and two, whereas only the learning and development team are involved at stage three.

Stage one of the research involves semi-structured interviews, which are analysed by means of a detailed coding analysis. The analysis follows the first cycle, second cycle approach as delineated by Saldana (2009, p152). Stage two involves an online survey questionnaire divided into seven dimensions and thirty statements. Respondents are asked to provide answers on a five-point Likert scale. The questionnaire also contains additional sections including the opportunity to rank the seven dimensions, an overall satisfaction question and the opportunity to provide some free-form answers relating to expectations and perceptions. The results are analysed by means of both descriptive and inferential analysis. The descriptive analysis investigates the

weighted average scores for both expectations and perceptions for a variety of dimensions and determines the gap between the two. This process is completed for the overall results (all organisations) and for each individual organisation. The same process is also completed for different stakeholder groups. The inferential analysis investigates the internal reliability of the questionnaire by means of Cronbach alpha analysis, the structural integrity of the questionnaire by means of factor analysis and the relationships between several variables by means of Chi-square analysis. Stage three of the research involves semi-structured follow-up interviews with the learning and development team, followed by a detailed coding analysis, similar to the approach utilised at stage one.

### **1.5. Units of Analysis**

Four business organisations are involved as units of analysis in this research study. These include three from the private sector and one from the public sector, as outlined below. For reasons of confidentiality the names of the organisations have not been supplied and sources in this section have not been identified.

Organisation one is the world's largest independent provider of claims management solutions to the risk management and insurance industry, with a global network of more than 700 locations in 63 countries. The organisation provides claims services, business process outsourcing and consulting services for many product lines including, property, healthcare, engineering and marine sectors. The Lord Ashcroft International Business School at Anglia Ruskin University has worked in partnership with organisation one since 2007, to deliver an MBA programme for senior managers from the UK and Western Europe.

Organisation two is a luxury retail store, based in London with over 1 million square feet of selling space and over 330 departments. The store offers a wide range of products and services including, clothing, electronics, jewellery, housewares, toys, pet products and furniture. Up to 300,000 customers visit

the store on peak days with a high proportion from non-English speaking countries. More than 5,000 staff from over 50 countries are employed by the organisation. The Lord Ashcroft International Business School at Anglia Ruskin University currently delivers a BA (Hons.) Sales in partnership with organisation two. The degree is designed to improve the sales skills of staff within the organisation.

Organisation three is one of the UK's largest independent timber and builder's merchants with 25 locations across its region. Its client base has grown to include such diverse sectors such as property development, the public sector, farming, exports and DIY. The organisation provides a range of services including bricks and engineering timber solutions through to kitchens and bathrooms, heating and plumbing, paints and fixings. The Lord Ashcroft International Business School at Anglia Ruskin University has been working with organisation three since 2009 to provide a Foundation Degree in Management.

Organisation four is one of the first NHS Foundation Trusts in the UK and acts as a university associate teaching hospital. The hospital provides an extensive range of acute medical services and serves a population of 310,000 within its region. More than £60 million has been invested in the last few years expanding and modernising the Hospital. The hospital caters for a wide range of medical conditions but particular specialisms include cardiovascular diseases and endoscopy. The Lord Ashcroft International Business School has worked in partnership with the Hospital since 2008 to provide an MA Leadership for middle and senior health managers.

## **1.6. Research Aims**

This research study has two overarching aims. The first is academic in nature. It is envisaged that this study will make a contribution to the evaluation literature by suggesting a new approach to the evaluation of corporate education programmes. It should also make a contribution to the service quality literature by applying existing approaches to service quality into a new

and interesting context. The second aim of the research study is more practical in nature. It is believed that this study will have real-life impact and improve corporate education programmes within the four organisations concerned. Indeed, the learning and development teams within all four organisations have expressed interest in utilising the expectation and perceptions survey questionnaire derived from this study in their future corporate education provision. The use of the survey questionnaire may also have impact in a wider range of organisations beyond this study if learning and development teams in a variety of sectors can see its potential for the future.

The research objectives and research questions are presented in Tables 1 and 2 respectively.

No.	Research Objectives
1.	To identify and evaluate expectations of service quality within corporate education programmes
2.	To identify and evaluate perceptions of service quality within corporate education programmes
3.	To identify and evaluate the gap between expectations and perceptions of service quality within corporate education
4.	To make recommendations as to how service quality within corporate education programmes can be improved within business organisations

Table 1: Research Objectives

No.	Research Questions
1.	Do stakeholders have the same expectations of service quality for corporate education programmes as they have for open education programmes?
2.	Is the notion of 'return on expectations' a helpful concept?
3.	Do expectations and perceptions of corporate education vary according to stakeholder group?
4.	Is the expectation and perceptions survey instrument a valuable tool in the evaluation of corporate education?

Table 2: Research Questions

## 1.7. Outline of Forthcoming Chapters

Chapter two provides the context that lies behind the contemporary emphasis in many UK business schools on corporate education. Firstly, the chapter

examines the nature of corporate education as an important element within the university business school agenda. Secondly the chapter presents the philosophical origins of corporate education by presenting two historical perspectives on the purpose of learning, namely liberalism and utilitarianism, arguing that corporate education lies primarily within the utilitarian tradition. Secondly, the chapter investigates four approaches to learning that have informed corporate education. These include experiential learning, work-based learning, action learning and problem-based learning. Thirdly, the chapter explores the internal and external factors which have helped to drive the emergence of corporate education. Finally, the chapter concludes by arguing that corporate education programmes are both conceptually and practically different in nature to open education programmes and require research in their own right within the higher education environment.

Chapter three explores evaluation and service quality in more depth. Firstly, the chapter examines the issue of evaluation. A wide range of models and frameworks for measuring the value of corporate education are explored. Secondly, the chapter examines criticisms of evaluation approaches with a particular focus on criticisms of return on investment. It argues that the search for quantitative proof of a 'return' remains almost as elusive as the search for the holy grail and a new approach, namely the assessment of expectations and perceptions of service quality, might prove to be a more effective lens through which to explore the evaluation process. Thirdly, the chapter explores the notion of service quality in depth and assesses the potential of expectations and perceptions as an evaluation tool for corporate education. In particular, the chapter investigates a variety of service quality models, namely SERVQUAL, SERVPERF and HEdPERF and concludes that, although they have been subjected to some criticism, they remain tried and tested models which have made a definite contribution to service quality over the years. Finally the chapter recognises that these models have been utilised within a wide variety of industry/sector contexts, especially within the higher education setting. However, there is little evidence that they have been applied to corporate education, thus presenting a gap in knowledge which is worthy of further research.

Chapter four explores the research methodology utilised in this research study. Several research philosophies are presented and the pragmatic paradigm is suggested as the most appropriate for delivering the research objectives. This is followed by an outline of the research design, which includes a sequential, mixed methods approach. The research methods are outlined in some depth, including initial semi-structured interviews, an online survey questionnaire and follow-up semi-structured interviews. Finally, a variety of research issues relating to the research are presented, including sampling, reliability, validity and ethics.

Chapter five outlines the findings of the research. The structure of this chapter is divided into three parts. The first outlines the findings from the stage one initial interviews and the results of the coding analysis. The second outlines the findings from the stage two survey questionnaire. This includes both descriptive and inferential statistical analysis of the quantitative results. The third outlines the findings from the stage three follow-up interviews and the results of the coding analysis.

Chapter six provides a detailed analysis of the findings. It discusses the findings in depth and integrates material from all three stages of the research. A further aim of this chapter is to draw upon academic literature from chapter two, three and four, as appropriate to enrich the discussion. The structure of this chapter is based upon the research objectives to ensure that the aims of the research study are fully met.

Chapter seven outlines the final recommendations and conclusions from the research study. The chapter proposes a series of general recommendations plus specific recommendations for corporate organisations and universities engaged in corporate education. Finally, it presents a series of conclusions which include limitations of the research and suggestions for further study plus some final thoughts on the contribution to knowledge which this PhD study has addressed.

## **Chapter 2 - Literature Review**

### **The Context – Corporate Education**

#### **2.0. Introduction**

*Synopsis: This chapter provides the context that lies behind the contemporary emphasis in many UK business schools on corporate education. Firstly, the chapter examines the nature of corporate education as an important element within the university business school agenda. Secondly the chapter presents the philosophical origins of corporate education by presenting two historical perspectives on the purpose of learning, namely liberalism and utilitarianism, arguing that corporate education lies primarily within the utilitarian tradition. Secondly, the chapter investigates four approaches to learning that have informed corporate education. These include experiential learning, work-based learning, action learning and problem-based learning. Thirdly, the chapter explores the internal and external factors which have helped to drive the emergence of corporate education. Finally, the chapter concludes by arguing that corporate education programmes are both conceptually and practically different in nature to open education programmes and require research in their own right as a context within the higher education environment.*

#### **2.1. Corporate Education**

Corporate education has become of increasing interest to university business schools over the last 30 years. Watling et al (2003, p226) state that the number of university business schools operating in this area has grown considerably since the early 1980's in response to a considerable increase in organisational spend on management development. A number of trends have accounted for the growth in corporate education. These include an increasing awareness by organisations of the importance of people and their development, the development of less structured and more context specific interventions, the development of stronger links to competency frameworks, more flexible approaches to developing managers, the move from open programmes to 'in-house' programmes, the increasing recognition by organisations that they require accreditation, an increased desire for work-



based application and an increasing interest in e-learning. The importance of e-learning is emphasised by Unkles (2003, p2) who recognises that this form of corporate education is particularly useful for widely dispersed workforces in rapidly changing industries. Benefits include lower cost delivery and easy access for participants. Ryan (2006, p155) presents further reasons for the increase in corporate education. These include the opportunities to combine theory and practice based on latest developments within the field, the desire to enable organisations to differentiate themselves from competitors, to bring those with leadership potential together for open discussion of business issues, to aid succession planning, to professionalise the industry and recognise the status of the study people have undertaken and to facilitate restructuring and provide an accredited process for skills development. In a later study Ryan (2009, pp1315-17) suggests several additional factors. The first is complementarity whereby the university award complements the in-house education programme. The second is that university programmes add strength and credibility to in-house programmes. The third is that involvement with a university expands the range of programmes offered by the organisation. The fourth is that the university provides a degree of objectivity to the organisation and encourages critical reflection on current practices. The fifth is the potential for integration of cutting-edge research and contemporary business practice.

University business schools benefit considerably from engagement in corporate education. Programmes of this nature enable academic institutions to fulfil their social responsibilities within both the local and national community (Brennan and Little, 1996, p10) and develop long term relationships with organisations leading to new forms of research and programme provision (Boud and Solomon, 2001, p18). Relationships between universities and industry such as knowledge transfer partnerships (Lambert, 2003, p4) and employer engagement (Wedgewood, 2008, p4) are seen as an important priority by government agencies and they enable universities to make an important contribution to the national education agenda. A further benefit of corporate education is the opportunity for university business school staff to understand the realities of the workplace. The credibility of academic

staff rests on an ability to relate the latest research and academic theory to contemporary approaches and practices within the current business environment. To lose touch with the realities of the workplace results in the loss of a 'raison d'être' for existence. The corporate education experience provides valuable opportunities for university business school staff to gain insights from organisational staff and maintain their own currency and relevance. In this sense corporate education is always a two-way process, whereby organisations learn from university business schools and vice versa (Ryan 2009, pp1315-17). Finally, it is also evident that university business schools see corporate education as a significant income stream for the future (Ryan, 2007, p160). In the light of high university fees and an increasing level of competition within the HE sector, third stream income has become an essential ingredient of annual income targets. This trend has been encouraged by government initiatives. HEFCE put out a call in May 2006 for projects on "Employer engagement in learning at HE level". Sixty million pounds in capacity funding was awarded for infrastructure development, followed by an offer in February 2007 of additional student numbers for places co-funded by employers (HEFCE, 2007).

Corporate education is defined by Prince and Stewart (2000, p207) as "any award or non-award bearing programme of study that is developed and run by a university with the involvement of a company or group of companies". An essential element in this definition is the role of the organisation or group of organisations working in partnership with the university to create a holistic service provision. A key benefit of partnership between a university and an organisation in the corporate education process is the opportunity for co-creation or co-production. Referring to work-based learning, which is often an important feature of corporate education, Boud and Solomon highlight the importance of "co-production of knowledge and of the learning experience" whereby learners are involved in negotiating their learning, whilst at the same time workplace supervisors from the partner organisation are involved in supervision of the learning process (Boud and Solomon, 2001, p21). The importance of co-creation has been well documented. Prahalad and Ramaswamy (2004, p8) note that consumers want to interact with firms and

thereby “co-create value”. They state that co-creation involves joint creation of value by the company and the customer. It allows the customer to be involved in co-constructing the service experience to suit their context. Key features will involve joint problem definition and problem solving and the opportunity to have active dialogue in constructing personalised experiences. The importance of co-creation is often seen in business to business relationships. Normann and Ramirez (2000, p66) recognise that value is co-created when the parties involved in a buyer-supplier relationship combine their knowledge and skills to achieve higher profits than would be achieved by working independently. They highlight the importance of developing a value constellation in which a wide variety of partners including suppliers, business partners, allies, and customers work together to co-produce value. Vargo and Lusch (2004, p2) agree, arguing that interactions among social and economic actors transform into complex value constellations. These constellations are crucial for value co-creation. Joshi and Chebbiyam (2011, p675) highlight the importance of these interactions, “co-creation is the positive sum relationship between two or more businesses, which collectively create value by providing access and transparency of information, engaging in dialogue, and sharing of risks”. An important means of fostering this interaction is the use of cross-functional, cross-firm teams (Enz and Lambert, 2011, p 506). Whilst much of the literature on co-creation focuses on the positive aspects of interaction, it is important to recognise that the integration processes involved also face challenges. Yngfalk (2013, p1177) states “when multiple actors interact, a complex network of different interests and logics must co-exist in every given context....the result is fragmented and disharmonised value creation processes...actor’s resource integration is dependent on their background, previous experiences and present goals. Hence actors embody various and often contradictory, understandings and perceptions of value”. In the context of corporate education, one example of fragmentation relates to the problem of proprietorship and ownership. Traditional university programmes are owned solely by the university whereas in work-based learning programmes these issues are more amorphous and more open to contestation and debate (Boud and Symes, 2000, p24).

The organisation acts not only as joint service provider for learning but also provides the context for learning. Indeed, the environment outside the classroom can play a dominant role in achieving learning. Corporate education involves complex elements in which “the cognitive operations of individual learning intertwine with the social processes of an organisation” (Kessel and Plomp, 1999, p679).

Some writers prefer to use the term ‘executive education’ for programmes aimed at corporate clients. This term, commonly utilised within higher education, suggests that the educational process is aimed at the strategic level within the organisation. Liedtke, Weber and Weber (1999, p405) state that executive education is seen as “a strategic tool which....reflects the urgent need for executive development to promote both individual learning and organisational adaptation and renewal”. Novicevic et al (2009, p155) state that executive education programmes are of benefit to both the individuals on the programme and to their organisations in that they “foster the development of an organisational culture supportive of business teams with emphasis on human and social capital”. Haskins (2012, p19), recognises several key differences between regular degree programmes and executive education programmes. These include (a) attendees on an executive education programme tend to have more work and life experiences than those on open degree programs; (b) executive education programmes tend to be shorter than open degree programmes; (c) executives are more bottom-line orientated, seeking immediate relevance to their work roles; (d) attendees on the programme are more critical of what the tutor can offer; (e) executive education programmes are designed to align with corporate objectives, as opposed to the tutor’s objectives; (f) corporate sponsors are often make more requests of the programme tutors. Haskins goes on to provide thirteen characteristics of a dynamic executive education instructor, as outlined in table 3. Dynamic instructors are those who:

No.	Characteristic
1	Invest time and effort to become familiar with a client company's history, products and services, customers, competitors, geographic presence, regulatory concerns, business units, strategic initiatives, executive leadership group.
2	Exhibit genuine enthusiasm for an EE program's overall objectives, each class session's subject matter, the client company and the program attendees, that is genuine, disarming and infectious.
3	Convey real and up-to-date "face validity" in regards to subject matter expertise and how that expertise is best brought to bear on a client's business issues.
4	Possess a willingness and an ability to tailor their classroom materials and classroom approach to the multi-dimensional profile of a managerial audience and to a client organisation's stipulated program focus.
5	Are able to quickly and clearly establish a believable, interesting, realistic, need-to-know foundation for the content of each of their class sessions.
6	Are skilled in providing tangible takeaways (e.g. Tools, techniques, frameworks, templates, protocols and change agendas) relating to new insights/capabilities that are readily useable by program participants back at work.
7	Invest time and effort to integrate their subject matter with that of other instructors teaching on the same EE program for the purpose of making powerful complementary connections, leveraging cross-functional know-how, creating multi-dimensional perspectives on important challenges/opportunities, and to promote the demise of stove-pipe views of functional areas.
8	Are gifted at distilling, in a compressed amount of time, the essence of complicated topics, into a few action-oriented points that participants are highly likely to recall after their program departure.
9	Present a pleasant demeanour of confident humility that is willing to field and address tough questions, acknowledges and celebrates the good ideas offered by the EE audience during class discussions, and purposefully challenges participants' assumptions, expectations and operating norms.
10	Tell provocative, engaging stories of pertinent exemplars from other companies, making explicit connections to the business issues faced by those in their current audience, in order to demonstrate and dramatize the practicality and achievability of the specific ideas under discussion.
11	Desire to establish both a personal and professional connection with the program attendees by interacting with them outside the classroom during breaks, meals, receptions, and other events that might be part of the programme design (e.g. simulations, round-table discussions, outdoor events) in order to learn more about the participants, explore participant-specific applications of class sessions, and to help establish a repertoire facilitating honest and open sharing of ideas, concerns and challenges.
12	Insightfully ascertain the right level and pace for presenting their subject matter content and make real-time classroom and program-wide adjustments as dictated by an audience's questions, interests, first-hand accounts.
13	Are interested and comfortable in gaining access to, and making purposeful connections with, some of the client's key top executives in order to have ongoing discussions with those executives regarding their perspectives on the company's business, competitors, markets, and personal learning needs.

Table 3: Characteristics of Dynamic Executive Education Instructors (Haskins, 2012)

It is clear that the terms 'corporate education' and 'executive education' exhibit many common characteristics and in practice the choice of terminology reflects the specific language preferences of each university business school. The choice of the term 'corporate education' for this research study reflects the desire for a wider and more embracing term that highlights the involvement of the corporate organisation in the education process, alongside the university. Executive education, as a terminology, focuses specifically on the strategic level of the participants who comprise middle or senior managers within an organisational hierarchy. Corporate education in contrast, may include participants at any level within the organisation, including those with more junior roles. The literature from both terminologies is useful in creating an overall picture of the phenomenon in question, but 'corporate education' as a generic term appears more appropriate and will be utilised within this research study.

## **2.2. Philosophical Origins**

In order to understand the distinctiveness of corporate education it is important to explore the philosophical foundations that lie at its roots. Historically, writers have advanced two contrasting perspectives on the purpose of learning.

### **2.2.1. The Liberal Tradition**

Since ancient times, the view has been propounded that learning is intrinsically worthwhile and should not be shackled to the imperatives of the workplace. Historical examples of this approach include Plato, Aristotle and, more recently, Cardinal Newman.

Plato (428-348 BC) was one of the most influential figures in western thought and founded what is said to be the first university, his Academy, in around 385 BC (Hare, 1991, p13). In *The Republic*, Plato regards mental processes as divorced from actual experience. Education is seen as a process of bringing forth knowledge already in the learner, a sort of recollection or reminiscence.

He argued that what is real is the ideal form of concept – goodness, love – not a material or experiential manifestation of it (Bailey, 2004, p25). In the ideal state, matters are overseen by the educated guardian class, whereas slaves, craftsmen and merchants are relegated to serving apprenticeships. Plato believed that true knowledge can only be obtained by transcending the mundane (Symes, 2000, p32).

Like Plato, Aristotle believed that the leisure classes should be free to pursue activities of the mind without being hampered by the exigencies of the mundane. In *Politics* he states “The whole of life is divided into two parts, business and leisure.....we have to be busy and go to war, but still more to be at peace and in the enjoyment of leisure.....we must do what is necessary and useful, but still more what is fine” (Burnett, 1967, p7). A practical life is busied about many things but the right enjoyment of leisure is “the one thing needful” and the highest aim of education will be to prepare us for this. In *Nicomachean Ethics*, Aristotle distinguishes five ways in which the soul derives at truth. The highest of these is wisdom, or theoretical wisdom. In *Metaphysics*, he argues that theoretical kinds of knowledge are more of the nature of wisdom than the productive or practical kinds of knowledge because they deal with the first causes and the principles of things (Moodie, 2008, p28).

One of the more recent modern apologists for the view that learning is intrinsically worthwhile, for its own sake, is Cardinal Newman. In his book ‘*The Idea of a University*’ he argues that the purpose of a university is to provide a liberal education, “it is common to speak of a ‘liberal knowledge’, of the ‘liberal arts and studies,’ and of a liberal education’ as the especial characteristic or property of a University and of a gentleman”. Liberal education is characterised by the fact that “knowledge is capable of being its own end” (Newman, 1852/1996, p80). In Discourse 5, Newman sees liberal education as opposed to ‘servile’ which he defines as bodily labour, mechanical employment, in which the mind has little or no part. He concludes “you see, then, here are two methods of education; the end of one is to be philosophical, of the other to be mechanical; the one rises towards general

ideas, the other is exhausted upon that which is particular and external” (Newman, 1852/1996, p81). In Discourse 7, he argues against other writers, such as John Locke, for whom “utility becomes their watchword” and stresses the pre-eminence of a liberal education which is “truly, and fully a useful, though it be not a professional education” (Newman, 1852/1996, p113). Newman clearly regards the ‘professionalisation’ of the university as a distortion of its true purpose and mission. The phrase “the idea of the university” was not created by Newman, but goes back to a significant period in university history, namely the reforms of Wilhelm von Humboldt in Prussia (Anderson, 2010 p1). Humboldt enshrined the idea that individuals should obtain a liberal, not a state or civic-centred education. A clear distinction exists between man as an individual and man as a citizen. It is the pursuit of freedom which is central to an understanding of the educational ideal. (Gronon, 2009, p160). Students should be engaged above all things in searching for the truth. Thus the function of the university is to advance knowledge by original and critical investigation, not just to teach skills (Sorkin, 1983, p58). Universities retain a body of pure theory and knowledge which need to be kept up to date by current research (Anderson, 2010, p2). It is only free men, who study this body of true knowledge, who will truly be able to enhance commercial and industrial success.

### **2.2.2. The Utilitarian Tradition**

In contrast to those who recognise education as intrinsically worthwhile for its own sake, writers with an alternative view have recognised the pre-eminence of practice and experience as key elements within the learning process.

John Locke recognised that utility is more important than that which is intrinsically worthwhile for its own sake. He states that the education of children should not be limited to rules and principles but requires practical experience. In *Thoughts Concerning Education* (Locke, 1778, p65) he states, “pray remember, children are not to be taught by rules, which will always be slipping out of their memories. What you think necessary for them to do, settle in them by an indispensable practice, as often as the occasion returns; and, if



it be possible, make occasions". Locke criticizes the ordinary subjects which are taught at school, on the grounds that they are not needed in later life, "reason, if consulted with, would advise, that children's time should be spent in acquiring what is useful to them, when they come to be men, rather than that their heads should be stuffed with a deal of trash, a great part of which they never do think on again as long as they live". In another passage he states "can there be any thing more ridiculous than that a father should waste his own money, and his son's time, in setting him to learn the Roman language, when at the same time he designs for him a trade" (Locke, 1778, p238).

Durkheim believed that school education should directly prepare pupils for vocational education (Walford and Pickering, 1998, p4). He also emphasised the importance of "social solidarity" (Durkheim, 1893, p63). He believed that increasing mutual dependence would solve experiences of anomie or demoralisation, of not knowing where we are (Portwood, 2000, p19). Essentially, this view recognises that culture consists of various kinds of knowledge that are transmitted to and internalised by others. This cultural transmission is crucial to maintaining social equilibrium because it ensures consensus among members. Learning is regarded as essentially socialisation or acculturation. The learner is inducted into a body of culturally defined knowledge. The process is essentially passive; appropriate social mechanisms and people teach the learner socially appropriate knowledge (Bailey, 2004, p25).

John Dewey challenges the notion of a purely liberal education and stresses the importance of experience and vocation in the educational process. He emphasises that action orientated, real-world problem-solving education is the most powerful means to raise the level of intelligence in individuals, groups, societies, communities and humanity in general (Benson, Harkavy and Puckett, 2007, p25). Dewey states "no-one is just an artist and nothing else....he must either support himself or be supported by others, and thus he has a business career.....a person must have experience, he must live, if his artistry is to be more than a technical accomplishment" (Dewey, 1918, p227).

He continues, “an occupation is a continuous activity having a purpose. Education through occupations consequently combines within itself more of the factors conducive to learning than any other method” (Dewey, 1918, p228). He elaborates this theme by stating, “the only adequate training for occupations is training through occupations” (Dewey, 1918, p228). Dewey argues that his historical time is characterised by the increasing importance of vocation. This is demonstrated in the following observations. There is an increased interest in whatever has to do with manual labour, commercial operations and the rendering of tangible services to society. Manufacturing and commerce has grown in importance considerably over the last century. The manufacturer, the banker and captain of industry have displaced an hereditary landed gentry as the immediate directors of social affairs. Industry has ceased to be essentially a rule of thumb procedure, handed down by custom. It is now technological. Finally, the pursuit of knowledge has become more experimental and less dependent on literary tradition (Dewey, 1918, p231). In an article entitled ‘Learning to Earn’, Dewey argues that instead of trying to split schools into two kinds, one of a trade type for children who it is assumed will become employees, and one of a liberal type for the children of the well-to-do, schools should be reorganised to give all pupils a general respect for useful work, an ability to render service and a contempt for social parasites (Dewey, 1940, p131). According to Dewey, education happens through direct contact with the world, through manipulating real things and through learning their social uses (Bailey, Hughes and Moore, 2004, p24).

### **2.3. Philosophical Foundations of Corporate Education**

In considering these two perspectives on the purpose of learning it appears immediately evident that corporate education rests on a utilitarian foundation. The desire within corporate education to develop work-based application (Watling et al, 2003, p226) and to combine theory and practice based on latest developments within the field (Ryan 2006, p155) suggest that corporate education is undertaken for the purposes of developing practice and experience. Dewey’s utilitarian emphasis on an action orientated, real-world problem-solving education (Benson, Harkavy and Puckett, 2007, p25) fits well

with the emphasis on practice and experience found within corporate education programmes. However, it is worth noting that there are advocates of a third approach to the purpose of learning. In the 20<sup>th</sup> century, some writers have argued that an adequate system of education should include a synthesis of both liberal and utilitarian elements. As early as 1948 Moyer argues that both liberal and vocational approaches are forces for good and that they can be harmonised in the interest both of the students and of the colleges of the liberal arts (Moyer, 1948, p404). One of the chief exponents of a synthesis between liberal and vocational is Whitehead (1962, p74), who states “if education is not useful, what is it?” He continues, “an evil side of the Platonic culture has been its total neglect of technical education as an ingredient in the complete development of ideal human beings”. However, he recognises that both liberal and vocational aspects of education are important, “the antithesis between a technical and a liberal education is fallacious. There can be no adequate technical education which is not liberal, and no liberal education which is not technical: that is, no education which does not impart both technique and intellectual vision.... education should turn out the pupil with something he knows well, and something he can do well” (Whitehead, 1962, p 74). More recently Pring (1993) states that both approaches have valuable insights to bring to the learning process and they can be reconciled (Pring, 1993, p76). In summary, whilst it is clear that corporate education with its emphasis on translating theory to practice has its roots primarily within the utilitarian tradition, it is undoubtedly the case that business and management education is intrinsically of value in its own right and is a subject of interest well beyond an immediate organisational context.

## **2.4. Approaches to Learning**

Corporate education is not only based on utilitarian philosophical foundations but has been informed in more recent times by a number of approaches to learning. Of these four stand out as requiring special investigation. They include experiential learning, work-based learning, action learning and problem-based learning. Definitions of these approaches abound. Warner Weil and McGill (1989, p248) view experiential learning as the process

whereby people engage in direct encounter and then purposefully reflect on that experience. Boud and Symes (2000, p6) see work-based learning as learning which occurs primarily in the workplace, with work as the curriculum. McGill and Beaty (2001, p11) recognise action learning as a continuous process of learning and reflection with the intention of getting things done. Barrows (1986, p1) sees problem-based learning as learning which results from working towards the understanding or resolution of a problem. The next few sections of this chapter explore the four approaches to learning in detail.

#### **2.4.1. Experiential Learning**

The first approach to learning which has informed corporate education is experiential learning. The roots of experiential learning lie in the work of John Dewey (as outlined in section 2.1.2). Dewey states that “experience is a weasel word. Its slipperiness is evident in an inconsistency characteristic of many thinkers”. (Dewey, 1925, p1). One of the reasons for this difficulty is that we all interpret our experience differently, “When I look at a chair, I say I experience it. But what I actually experience is only a very few of the elements that go to make up the chair, namely that colour that belongs to that chair under these particular conditions of light, the shape that the chair displays when viewed from this angle etc.” (Dewey, 1925, p4). More recently, Boud, Cohen and Walker (1993, p7) have developed this point by emphasising that experience is “multifaceted, multi-layered and so inextricably connected with other experiences that it is impossible to locate temporally or spatially. It almost defies analysis as the act of analysis inevitably alters the experience and the learning which flows from it”. Despite this evident complexity, Dewey recognises the importance of experience and of eliminating the gap between a child’s experience and the subject matter that is the object of study. “Abandon the notion of subject matter as something fixed and ready-made in itself, outside the child’s experience; cease thinking of the child’s experience as also something hard and fast; see it as something fluent, embryonic, vital; and we realise that the child and the curriculum are simply two points which define a single process.....it is a continuous reconstruction moving from the child’s present experience out into that represented by the organised bodies

of truth that we call studies” (Dewey, 1902, p11). Dewey emphasises that there is an intimate relationship between the processes of actual experience and education (Dewey, 1938, p19). However, he also emphasises that some experiences are mis-educative, in that they can arrest or distort the growth of further experience (p25).

Another founder of the concept of experiential learning was Kurt Lewin, the founder of American social psychology. The consistent theme in all his work was his concern for the integration of theory and practice, summed up in his quotation “there is nothing so practical as a good theory! (Lewin, 1951, p33).

A third tradition of experiential learning is constructivism. In contrast to the instructivist approach whereby knowledge is perceived as flowing from experts to novices (Booth, 2001, p170), constructivism’s central premise is that a learner is believed to construct, through reflection, a personal understanding of relevant structures of meaning derived from his or her action in the world (Fenwick, 2001, p10). The Swiss psychologist Piaget described this construction process as oscillating between assimilation and accommodation. Individuals sometimes assimilate new objects of knowledge by incorporating them into their personal internal network of knowledge constructs. At other times individuals accommodate, by altering these constructs when confronting new experiences that may contradict their past knowledge. Each person may construct very different understandings after interacting with the same objects in the same environment (Piaget, 1966, p23).

The constructivist view has been embedded in the writings of many other authors. Schön (1983, p2) recognises that professionals live in a world of uncertainty, instability and complexity in which they often deal with problems that no existing rules or theories learned through formal training or past experience can help them. He is most interested in reflection as it relates to experience. He makes a distinction between reflection-in-action, which involves improvisation on the spot, and reflection-on-action which takes place after the event or episode itself. Critical reflection, according to Schön (1983,

p3) goes further in that it questions situations, asking why things are the way they are and why events unfold in the way they do. Mezirow (1978, p29) presents a theory of transformative learning based on a tri-level concept of critical reflection on experience. He argues that when an individual encounters a 'disorientating dilemma' it triggers reflection. First individuals reflect on the *content* of the experience, secondly on the *process* they employed and thirdly on the *premises and assumptions* on which they have based their problem-solving processes. In this third level of reflection the individual confronts established norms, leading to *transformation* in the learner's way of viewing the world.

Kolb draws upon the work of Dewey, Lewin and Piaget in his landmark book 'Experiential learning: experience as the source of learning and development' (1984). He emphasises that experiential learning offers a foundation for an approach to education and learning that is based in the traditions of social psychology, philosophy and cognitive psychology and that it emphasises the critical linkages that can be developed between the classroom and the "real world" with experiential learning methods. The workplace is a learning environment which can enhance and supplement formal education (Kolb, 1984, p4). Based on ideas from Dewey and Lewin, Kolb has developed his famous cycle of concrete experience, observation and reflection, formation of abstract concepts and generalisations and finally testing the implications of concepts in new situations (Kolb, 1984, p21). The model has been criticised as being too simplistic (Jarvis, 1987, p17) as well as too ordered and predictable (Newman, 1999, p84). Meittinen (2000, p68) argues that Kolb's interpretation of the work of Dewey, Lewin and Piaget is selective and does not represent the facts. He also concludes that Kolb's experience and reflection occur in isolation whereas in reality humans interact together and with their environment. Taylor (1991, p258) also highlights the limitations of a circular approach to the model arguing that experiencing, reflecting, thinking and action are all different aspects of the same process, not necessarily sequential. Despite these criticisms, Kolb's model remains influential within management education within the US and UK. Later writers have added to Kolb's model. This includes the Honey and Mumford learning styles inventory.

“The term learning styles is used as a description of the attitudes and behaviours which determine an individual’s preferred way of learning”. (Honey and Mumford, 1992, p1). Cowan (1998, p37) has also redrawn the Kolb cycle “rather like an overstretched spring” to reflect more of the reflective processes based upon Schön. Boud and Walker (2000, p34) have also refined Kolb’s model to include more refinement on the role of the process of reflection.

A further contribution to experiential learning theory comes from Friere (1972), who presents a damning critique of schools which separate learning from the world in which it is to be used. In his critique, he states “education thus becomes an act of depositing, in which the students are the depositories and the teacher is the depositor.....this is the banking concept of education.....but in the last analysis, it is men themselves who are filed away through the lack of creativity, transformation and knowledge in this (at best) misguided system. For apart from inquiry, apart from the praxis, men cannot be truly human. Knowledge emerges only through invention and reinvention, through the restless, impatient, continuing hopeful inquiry men pursue in the world, with the world and with each other” (Friere, 1972, p45-6). To counteract the banking education approach Friere proposes ‘problem posing education’ which involves an unveiling of reality and critical intervention in reality (p54). Illich (1972, p132) applies many of Friere’s ideas by presenting a serious critique of Western education and encouraging a ‘de-schooling’ of society.

There have been many attempts to provide a definition of experiential learning. ‘Experiential learning’ refers to a spectrum of meanings, practices and ideologies (Warner Weil and McGill, 1989, p3). Winter (1989, p8) distinguishes between ‘experience’ and ‘learning from experience’. The link between experience and learning is made even more forcefully by Boud, Cohen and Walker (1993, p8) who state “we find it to be meaningless to talk about learning in isolation from experience. Experience cannot be bypassed; it is the central consideration of all learning. Learning builds on and flows from experience. Kolb (1984. p38) had a similar perspective “learning is the process whereby knowledge is created through the transformation of experience”. The link between experience and learning, however, is not

always straightforward. Winter (1993, p8) makes the point that a colleague's ten years' experience may in fact be one years' experience repeated ten times over. "Experience has to be arrested, examined, analysed, considered and negated to shift it to knowledge" (Criticos, 1993, p2).

The connection between experience and learning has developed a terminology of its own. Usher and Soloman (1999, p23) make a distinction between 'learning from experience', which takes place in the life world of everyday contexts, and 'experiential learning' which is a more specialised term, normally occurring in the context of formal education. It is "a key element of a discourse which constructs experience in a particular way as something from which knowledge can be derived through abstraction and by use of methodological approaches such as observation and reflection" (Usher and Soloman, 1999, p24). A number of other writers have attempted to define the term 'experiential learning'. Coleman (1976, p51) makes a distinction between information assimilation and experiential learning. Information assimilation involves receiving information, organising information and inferring a particular application from a general principle. Experiential learning is almost a reverse process, whereby one carries out an action, sees and understands the effects of that action and derives a general principle from that action. Laurillard (2002, p21) makes a similar point, distinguishing between first order experience of the world, which involves the traditional educational experience of accumulating knowledge in isolation and second order experience of the world which is 'situated' and involves reflecting on experience. Saddington (1992, p44) follows a similar view "experiential learning is a process in which an experience is reflected upon and then translated into concepts which in turn become guidelines for new experiences. Chickering (1976, p63) argues that experiential learning is the learning that occurs when changes in judgements, feelings, knowledge or skills result for a particular person from living through an event or events. Beard and Wilson (2006, p19) see experiential learning as "the sense-making process of active engagement between the inner world of the person and the outer world of the environment". Boydell (1976, p19) views it as "synonymous with meaningful-discovery learning....which involves the learner in sorting things out for



himself, by re-structuring his perceptions of what is happening”. One of the most comprehensive definitions is provided by Warner Weil and McGill (1989, p248), who view experiential learning as “the process whereby people individually and in association with others, engage in direct encounter, then *purposefully* reflect upon, validate, transform, give personal meaning to and seek to integrate their different ways of knowing. Experiential learning therefore enables the discovery of possibilities that may not be evident from direct experience alone”.

A number of frameworks have been developed to assist in the understanding of experiential learning. Warner Weil and McGill (1989, p3) have created a typology outlining four ‘villages’. The villages represent clusters of interrelated ideas and concerns relating to experiential learning. The first village is concerned with assessing and crediting learning from life and work experience as the basis for creating new routes into higher education, employment and training opportunities, and professional bodies. The second is concerned with experiential learning as the basis for bringing about change in the structures, purposes and curricula of post-school education. The third emphasises experiential learning as the basis for group consciousness raising, community action and social change. The fourth is concerned with personal growth and development and experiential learning approaches that increase self-awareness and group effectiveness. Saddington (1998, p134) builds on Warner Weil and McGill’s four villages to show three basic dimensions of educational practice which demonstrate different dimensions of experiential learning. These are progressive, humanist and radical perspectives.

Boud, Cohen and Walker (1993, pp8-16) have developed five propositions about experiential learning, namely (a) experience is the foundation of, and the stimulus for all learning, (b) learners actively construct their own experience, (c) learning is a holistic process, (d) learning is socially and culturally constructed, (e) learning is influenced by the socio-emotional context in which it occurs. Beard and Wilson (2006, pp36-38) have posited three types of experiential learning: concurrent learning, which is learning in

the present as things happen; retrospective learning; which is learning from past events and actions and prospective learning which is learning from the experiences of others prior to them happening to us. Andresen et al. (2000, p227) also mention three further factors which characterise experience-based learning. Firstly, intentionality of design; learning events may be structured. Secondly, facilitation; experiential learning situations tend to be managed by facilitators rather than teachers. Thirdly, assessment of learning outcomes; these are processes of assessment which are particularly characteristic of experiential learning such as learning journals, negotiated learning contracts, peer assessment and self-assessment. Moon (2004, p113) recognises four 'outside boundaries' which are important for an understanding of experiential learning. The first is that it takes effort and does not occur automatically when someone has an experience. The second is that not just any experience results in learning, but rather specific experiences that are often at the right time and in the right place. The third is that 'unlearning' can be a more important gain from experiential learning than 'learning'. Finally, experiential learning should explicitly recognise the subjective nature of the experience. Fenwick (2001, pp27-51) suggests four alternative approaches to a constructivist view of experiential learning. The first is a psychoanalytic perspective, which recognises the conflicting desires at the heart of the pedagogic encounter. The second is the situative perspective, whereby learning is rooted in the situation in which the person participates. The third is a critical cultural perspective which recognises power as a core issue in experience. The fourth is an 'enactivist' perspective which recognises that learning exists in a complex ecology or organismic relationality.

#### **2.4.2. Work-based Learning**

The second approach to learning which has informed corporate education is work-based learning. "Isn't it high time that we return learning to perhaps its most natural location – to the workplace?" (Raelin, 2008, p3)

#### 2.4.2.1. Definitions of Work-based Learning

Work-based learning is a slippery concept, not given to straightforward definition (Caley, 2001, p113). Smith (2001, p31-48) hints as to why this might be so by referring to programmes of work-based learning as “throwing a net around slippery experience and capturing it as learning”. Brennan (2005, p4) argues that the term work-based learning has become ubiquitous and is made up of a cluster of concepts which make it difficult to define. Costley (2000, p27) agrees, stating that “work-based learning is not easily defined because it is designed to be flexible, it is a customised programme and it is multidimensional” Despite this evident complexity, many attempts have been made to define the term. One of the early attempts to define the term was Levy et al. (1989, p 4) who defined work-based learning as ‘linking learning to the work role’. They identified three interrelated components, namely structuring learning in the workplace, providing appropriate on-job training/learning opportunities and identifying and providing relevant off-job learning opportunities.

At a simple level work-based learning can be defined as “learning, which takes as its starting point the learner’s activities at work in their company or organisation” (Durrant, Rhodes and Young, 2009, p1). Other writers present a similar view, “work-based learning occurs primarily in the workplace, with work as the curriculum” (Boud and Symes, 2000, p14). Many providers of work-based programmes make a distinction between learning *at* work, *through* work, *for* work and *from* work (Seagraves et al, 1996, p6).

In the US the expression work-based learning has been used within school settings. The 1994 US legislation called the Schools-To-Work Opportunities Act initiated activities that were classified as work-based, as opposed to school-based learning. These opportunities include a partnership between the school, the organisation and the student, and may include activities such as internships, international experiences and clinical practice (Raelin, 2008, p46). In the UK there is also an increasing number of work-based opportunities for pre-16 students within the workplace (Asher, 2005, p64-69).

To many advocates of work-based learning, the term has a unique interpretation in the sense that it is learning that receives academic recognition (Boud and Symes, 2000, p14). Within the higher education sector, the term work-based learning is therefore used to describe “a class of university programmes that bring together universities and work organisations to create new learning opportunities in workplaces. Such programmes meet the needs of learners, contribute to the longer term development of the organisation and are formally accredited as university courses” (Boud, Solomon and Symes, 2001, p4). The term ‘work-based learning’ should therefore be distinguished from the notion of ‘work-related learning’ which does not necessarily require areas of the curriculum to be completed in the workplace itself (Brennan, 2005, p4). Boud and Symes, (2000, p14) believe work-based learning should also be distinguished from ‘workplace learning’ which is that form of learning that develops at work on a daily basis as employees acquire new skills or develop approaches to solving problems, but does not accrue any formal educational recognition.

Boud, Solomon and Symes (2001, p4-7) cite several characteristics of work-based learning programmes. A partnership is established between an external organisation and an educational institution to foster learning and the learners involved are employees of, or are in a contractual relationship with, the external organisation. The programme followed derives from the needs of the workplace and of the learner, rather than being controlled or framed by the disciplinary or professional curriculum. The starting point and educational level of the programme is established after learners have engaged in the process of recognition of current competencies and identification of the learning they wish to engage in. An important element of work-based learning involves learning projects that are undertaken in the workplace. Finally, the educational institution assesses the learning outcomes of the negotiated programmes with respect to a framework of standards and levels.

#### **2.4.2.2. Characteristics of a Work-based Curriculum**

It is important to state at the outset that there is no one form of work-based learning...“its current incarnations are a reflection of the contemporary moment and in different circumstances, work-based learning might have a different character altogether” (Boud and Symes, 2000, p15). However, it is possible to identify some common themes. A work based curriculum needs to establish work-based learning as a learning enterprise that, while commonly undertaken at work, is not identical to work (Boud, 2001, p48-57). Some of the characteristics of work-based learning have been described by Learndirect for their Learning Through Work Programme as task related, problem-based (or issue-led), innovative, both strategic and just in time, autonomously managed and self-regulated, self-motivated, team-based and concerned about enhancing personal and organisational performance (Brennan, 2005, p16). Work-based learning should involve internal stakeholders, especially line managers, plus academic supervisors and peers (Shipley, 2001, p150). External stakeholders such as other providers of high-level learning utilised by the employer may also need to be involved, for example independent training providers (Garnett, Comerford and Webb, 2001, p111). Work-based programmes should also include customisation of the learning package to the organisation (Shipley, 2001, p150), which may involve flexibility in the pattern of delivery, pace of the programme and the approach to pedagogy (Garnett, Comerford and Webb, 2001, p111) and will lead to the creation of added value for the organisation (Shipley, 2001, p150) and tangible outcomes which have the potential to enhance the intellectual capital of the organisation (Garnett, Comerford and Webb, 2001, p111). Various approaches to the learning process may be utilised including action projects, learning teams and mentorships that permit and encourage learning dialogues (Raelin, 2008, p2). Finally, the outcomes of work-based learning should be located in a framework of levels and standards of achievement and documented through means of proper assessment. The approaches to assessment may need to be different from that of traditional taught programmes (Boud, 2001, p48-57).

From the perspective of the learner, work-based programmes should be characterised by a high degree of critical reflection which enables learners to engage constructively and deeply with ideas (Boud, 2001, p48-57). Skills required by learners should include the ability to analyse workplace experiences, the ability to learn from others, the ability to act without all the facts available and the ability to choose among multiple courses of action (Tennant, 2000, p127). From the perspective of the teacher, various approaches can be adopted including the teacher acting as arbiter of what constitutes worthy knowledge, guide who assists learners to 'learn from experience', measurement specialist who monitors performance, facilitator who processes the concerns and interests of learners or critical commentator who addresses issues of power and authority (Tennant, 2000, p129).

#### **2.4.2.3. Benefits of Work-based Learning**

Organisations gain great benefits from work-based learning. Employers may gain affordable staff development opportunities, employee motivation and access to a wider knowledge base. Taken together these may increase competitiveness (Brennan and Little, 1996, p10). Shipley (2001, p148) presents several drivers towards work-based learning which create tangible benefits. These include the performance management driver in which organisations seek to link individual performance to organisational performance, the strategic plan driver, in which the organisation seeks to align individual goals with the wider strategic plan and the compliance driver, in which organisations set up work-based learning approaches to comply with licensing, accreditation or legislated standards. Further drivers include the succession planning driver, in which the organisation ensures that the capability base of the organisation has survival and growth beyond the employment term of current employees, the industrial relations driver, in which the acquisition of portable qualifications will be seen as positive by employees and unions and finally the innovation driver: in which innovation is derived from the freedom to engage in new projects.

Work-based learning also offers a vehicle for linking individual learning to the development of corporate capabilities. Furthermore it assists in facilitating change and for retaining employees (Boud and Solomon, 2001, p18). At Bovis, a work-based learning programme set up in conjunction with Middlesex University and Webb Associates provided Bovis with an in-house research and development capacity, which was able to utilise university support (Garnett, Comerford and Webb, 2001, p109).

Employees also benefit greatly from work-based learning. Work-based learning provides an opportunity for gaining qualifications that incorporates their existing knowledge and experiences and that links learning to current workplace performance needs and career goals (Boud and Solomon, 2001, p18). It enables students to gain personal development, career advancement and portable qualifications (Brennan and Little, 1996, p10). There are also potential savings of time and effort on the part of the learner in work-based learning compared to similar tasks in an educational setting (Boud, 2001, p35). In one training programme at Bovis, the Training Manager identified the following benefits for participants as a clear sense of purpose for work-based projects and the personal rewards that can come from them; an understanding of the concepts of academic research and how to apply them in the workplace; a greater sense of responsibility for personal and continuing professional development; an enhanced and more participative role in personal appraisal and consequently an improved dialogue with line managers; a greater sense of self-esteem, especially as a result of gathering evidence of competency and finally a clearer understanding of the role and expectations resting upon them as managers (Garnett, Comerford and Webb, 2001, p109). Organisations may offer inducements to employees to take up work-based learning study. These may involve remuneration, career progression and recognition (Shipley, 2001, p146).

#### **2.4.2.4. Challenges of Work-based Education**

Organisations face many challenges in relation to work-based learning. Academics and practitioners within companies may fail to talk the same

language and comprehend one another. A further problem for organisations when they consider work-based learning is the classic problem of “transfer in the psychology of learning” (Bowden and Marton, 1998, p 25). There is a danger of a learner’s understanding being trapped within their own immediate work setting. It is critical for learners to perceive what they are learning separate from their immediate context and apply their learning to wider settings. (Boud, 2001, p42). A further challenge to organisations is the cost. Some senior managers have already begun to question the appropriateness of work-based learning awards, believing that contrary to expectation these awards have not proven any cheaper than traditional awards (McIntyre and Solomon, 2000, p96). Organisations have also begun to recognise that successful work-based learning may prove to be a bargaining tool for individuals within their current work environment or in the wider job market (Brennan and Little, 1996, p122).

Employees also face many challenges with work-based learning. Some of the most commonly cited barriers to work-based learning are financial cost and the lack of awareness of financial incentives, inability to get time off and family commitments (Brennan and Little, 1996, p121). Boud (2001, p35) cites a number of further challenges for employees when considering work-based education. The role of worker and learner do not necessarily sit well together. It may be difficult to distinguish learning from working, especially as the learning is multi-modal. It may be difficult to determine when a shift from one mode to another has taken place. Moreover, work-based learners may struggle with their identity and not feel like students. Many of the conventional approaches to being a student, such as attending classes and taking exams are absent. Students, as learners, also face the problem of responding to a variety of expectations. They are subject to multiple layers of surveillance – from management in relation to performance agreements and from academics in their role as assessors of learning. They also have their own expectations which may revolve around enhanced job prospects and career development. Handling this ambivalence and managing these differing expectations may not be an easy task (Solomon and McIntyre, 2000, p118).



Universities also face challenges in relation to work-based learning. Boud and Solomon (2001, p27-30) cite three major challenges for work-based learning, namely equivalence, practice and identity. Equivalence relates to the fear of some academics within HE institutions that work-based learning is contributing to a lowering of standards within the university. For many, academics “standards” relate to a body of disciplinary or professional knowledge, which are constructed within and accountable to a disciplinary community. The movement to cross-disciplinary or trans-disciplinary knowledge has led to concerns that the academic standard of that knowledge is no longer certain. Concerns about practice relate to the complexities of converting work practices into learning practices, plus the need to ensure a place for theory and critical reflection in the learning process. A related concern is the challenge of finding tutors with the right skills for work-based learning. The challenge to identity involves the need for universities to reshape the curriculum and knowledge structures of the institution to accommodate work-based learning and indeed to “reposition the academic” (Boud and Solomon, 2001, p30). The role of the academic requires a shift from expert in a discipline to facilitator in learning. This may pose a threat to some academics who feel de-skilled and de-schooled. Administrators may also struggle with work-based learning, since the time-frame involved is often incompatible with the university calendar (Boud and Symes, 2000, p19).

New forms of assessment also need to be devised that are tailored to work-related forms of learning (Boud and Symes, 2000, p20). Moreover, different views on assessment between academics and work practitioners may arise within a work-based study programme. In a partnership programme at the University of Portsmouth, a project on a military satellite navigation system was judged as an average piece of work by the academic but as a first class commercial development by the company mentor (Lyons and Bement, 2001, p169). Although the initial enthusiasm for work-based learning was driven by the need to generate new revenue streams for the university, it has now become clear that the university-delivered components of work-based learning are labour-intensive and expensive. Elements of cost include the additional administrative infrastructure required within a faculty and the

individualised supervision of proposals and portfolios (Onyx, 2001, p137). Solomon and McIntyre cite a further challenge, namely a “problem of location in work-based learning” (2000, p116). Where exactly do learning exchanges occur? They argue that this is more than merely a contestation of the site of learning, but has to do with locus of control. Universities are ceding authority to other and more powerful interests beyond educational institutions. As Tennant states “universities have lost their monopoly over the accreditation, production and distribution of knowledge” (2000, p 123).

### **2.4.3 Action Learning**

The third approach to learning which has informed corporate education is action learning.

#### **2.4.3.1. Definitions of Action Learning**

The concept of action learning was originally founded by Reg Revans, who organised a programme for coal mine managers in 1954. It was not until 1972 that he first used the term “action learning” in published form (Boshyk, 2010, p 68). Revans refused to define action learning, preferring to describe it in terms of what it is not (Dilworth, 2010, p6). It is not job rotation, project work, simulation, group dynamics, business consultancy or simple common sense (Revans, 1980, p306-311). From 1972-1983 he outlined action learning in more detail, providing working explanations rather than definitions. “Learning by doing is an insufficient explanation (of action learning)...It is rather learning to learn by doing with and from others who are learning-to-learn by doing” (Revans, 1980, p288). He also argued that there can be “no action without learning and no learning without action” and “experience is the best curriculum and colleagues, the best teachers” (Revans, 1982, p349). He did come close to a definition in 1983, “action learning is to make useful progress on the treatment of problems/opportunities where ‘no solution’ can possibly exist already because different managers, all honest, experienced and wise, will advocate different courses of action in accordance with their different

value systems, their past experiences and their different hopes for the future” (Revans, 1983, p28).

Whilst Revans himself refused to define action learning, others have been brave enough to make the attempt. Pedler (1997, p18) provides the following, rather wordy definition “action learning couples the development of people in work organisations with action on their difficult problems...action learning makes the task the vehicle for learning and has three main components – people, who accept the responsibility for action on a particular task or issue; problems, or the tasks which are acted on; and the set of six or so colleagues who meet regularly to support and challenge each other to take action and to learn. Action learning implies both organisation development and self-development – action on a problem changes both the problem and the actor”. Willis (2010, p 167) provides a more succinct definition: “action learning is a process of reflecting on one’s work and beliefs in a supportive/confrontational environment of one’s peers for the purpose of gaining new insights and resolving real business and community issues in real time”. McGill and Beaty (2001, p11) present a similar view “action learning is a continuous process of learning and reflection, supported by colleagues, with the intention of getting things done. Through action learning individuals learn with and from each other by working on real problems and reflecting on their own experiences”.

#### **2.4.3.2. Original Precepts of Action Learning**

Revans argues that organisations cannot make progress unless their rate of learning (L) is equal to, or greater than, the rate of change (C) being experienced, hence  $L \geq C$ . Revans created a further formula for accelerating the velocity of learning to keep pace with the rate of change. This was expressed in his learning equation  $L = P + Q$ , where L stands for ‘learning’, P stands for ‘programmed instruction’ (from teachers or books) and Q stands for ‘questioning insight’ (ie. question-driven enquiry) (Revans, 1982, p711). Q, according to Revans, is the essential factor in action learning and one should always start with Q. For Revans, education has traditionally placed too much emphasis on P, taught by experts, rather than Q, which is initiated by people

questioning their own experience and revealing the depth of their ignorance (Morris, 1997, p 49).

Revans suggested a place to start, in terms of basic questions in dealing with different dimensions of organisational problems. He called this System Alpha (Revans 1982, p333). There are three lead questions from which others can be derived namely: what is happening, what ought to be happening, and how do we make it happen? System Alpha leads to what Revans terms System Beta. This includes a survey stage, a trial decision stage, an action stage, an inspection or audit stage and a control stage (Revans, 1982, p 334). Finally the action learning process can lead to System Gamma, characterised by a symbiosis between the manager and the situation he is trying to manage (Revans, 1982, p348). System Alpha is the decision or strategy system which rests on the manager's values, the external environment and the internal resources of the organisation; System Beta is the influencing or negotiation cycle required to implement the decision or strategy and System Gamma is the learning process as experienced by each action learner and involves self-questioning and an awareness of self and others (Lessem, 1997, p83). Revan's view was that "System Gamma was the essence...(it) ...represents in its own way the structure of all intelligent behaviour and offers in conjunction with systems alpha and beta, one starting point for a general theory of human action, for a science of praxeology" (Revans, 1971, p58).

Revans made a distinction between puzzles and problems. Puzzles are conundrums to which one or more solutions exist. They are the field of experts, who can be given algorithms to solve them. Problems have no unique solution. Different people, faced with the same problem, will advocate different lines of future action (Revans, 1982, p712). Dilworth adds that problems should never be fabricated; instead they should be real, urgent and even daunting. Real problems are the "learning engine", that drive the energies of the group (Dilworth, 2010, p13).

### **2.4.3.3. Elements of Action Learning**

Weinstein proposes five main elements of action learning, namely the set, the projects or tasks, the processes, a set advisor and the duration of the programme (Weinstein, 1995, p10). This framework is now taken up in more detail.

The action learning set: Revans is very clear about the centrality of the action learning set, describing it as the “cutting edge of every action learning programme” (Revans, 1998, p10). The essence of the set is to create the conditions to stimulate learning from action (McGill and Beaty, 2001, p29). Sets should be characterised by support, confidentiality, challenge and reflection and should be contractual and a source of resources (Weinstein, 1995, p90). The size of the set should ideally be between four to six members, and Revans believed that five was ideal (Boshyk, 2010, p15). Inglis (1994, p60) believes that the composition of the set should be made up of a variety of members, including those with technical expertise and those who are involved for their own self development. The exact composition of the set will be determined by a number of factors including whether it is an in-company programme, the programme objectives, geography and the specific issues the participants wish to address (Weinstein, 1995, p97). McGill and Beaty (2001) throw the net wide stating that set members can include “anyone who can benefit from the experience” (p16). Sets should meet for full or half day, every four to six weeks, over several months or a year (Pedler, 2008, p23). Revans describes the set members as ‘comrades in adversity’ though Mumford later describes them more positively as ‘comrades in opportunity’ (Mumford, 1997, p16).

Problems, issues and projects: Inglis (1994, p56) states that there is a great deal of overlap between the terms ‘problem’, ‘issue’ and ‘project’....for the sake of readability the three terms are frequently interchangeable. McGill and Beaty (2001, p18) state that at one level “anything” can be brought to a set, but concede that trivial issues are unworthy of set time. For Pedler, an action learning problem is an issue, a concern, an opportunity or a task that you

want to do something about (Pedler, 2008, p41). Some projects select themselves when a pressing problem requires urgency, but at other times problems are longer term and it is important to tackle the underlying issues rather than papering over the cracks (Inglis, 1994, p56). Problems can be familiar or unfamiliar. This concept led to Revans 'Four Square' model, namely a familiar problem in a familiar setting; a familiar problem in an unfamiliar setting; an unfamiliar problem in a familiar setting and an unfamiliar problem in an unfamiliar setting (Revans, 1982, p16). Weinstein (1995, p130) states that the focus for a project might be an organisational or departmental issue, a personal managerial issue or a self-development issue. Above all a project should be something that participants can get their teeth stuck into, find a challenge, want to resolve, have authority to do something about, can report back on and can learn from.

The action learning process: The action learning process within the set differs from any other group gathered together to work, in that its purpose is not to resolve issues, but rather to help each individual member to resolve their own issues (Weinstein, 1995, p88). Dilworth (2010, p14) mentions two types of action learning set process. The first is 'everyone brings one' (EBO). Here, every individual brings their own unique issue to the table, though he concedes that the downsides of this approach are that the issues can be uneven in their difficulty and that other set members will not have the same level of interest in them. The second is 'one common joint problem' where every team member works on the same issue and seeks to pool their knowledge to diagnose the problem, carry out research and produce recommendations. Weinstein's view, however, is that even where the group is working together on a project, each individual should be allocated a mini project for themselves to retain an individual element in the process (Weinstein, 1995, p88).

The action learning process should begin with a start-up workshop. The aims are to outline the principles of action learning, enable participants to understand their own learning styles and, above all, clearly define the problem or project that they wish to pursue (Inglis, 1994, p74). Ground rules should

also be drawn up at the start and agreed by all set members (McGill and Beaty, 2001, p 36). Once the start-up workshop has been undertaken, the regular action learning sets should be characterised by the following processes: airspace in which to present, asking helpful and challenging questions, listening, focusing on learning as much as action, reflecting, allowing space for silences, refraining from being judgemental or giving advice and finding formulas to share ideas and thoughts (Weinstein, 1995, p156). It is important to record the discussion through use of a learning log, which can also be used outside the set time in relation to on-the-job learning (Inglis, 1994, p80). It is essential that, at the end of the action learning set, each member should leave with specific action points for their project that they have decided to complete before the next meeting (McGill and Beaty, 2001, p42). Regular reviews are also helpful in which members stop and reflect on how well the process is working (Pedler, 2008, 34).

The set advisor: Revans viewed the action learning set as an assembly of equals which should have no leader. He did accept that a facilitator might be required especially in the early stages to 'jump start' the set but the facilitator should then stand back and allow the set members autonomy unless asked to participate. Some practitioners of action learning, such as the Action Reflection Learning School (ARL) and The World Institute of Action Learning (WIAL) have moved away from this approach by placing a strong emphasis on 'expert facilitation' in which the facilitator has much more authority over the action learning set, but this a clear departure from Revans original concept. (Dilworth, 2010, p23). McGill and Beaty (2001, p66) present a helpful perspective on this dilemma, by highlighting three modes of facilitation; hierarchical mode, used in the initial stages where direction and the exercise of power is important; cooperative mode, used once the action learning set becomes more confident, in which the facilitator shares their power over the learning process with the set members; and finally autonomous mode whereby the facilitator accepts the total autonomy of the set members.

In the spirit of Reg Revans' approach, Weinstein (1995, p208) makes clear what a set adviser is not, namely a tutor, a lecturer, a chairman, a group

leader and an evaluator of group members. Casey (1997, p212) states that the role of the set advisor should be; to facilitate giving; to facilitate receiving; to clarify the various processes of action learning and to help others take over 1, 2 and 3. He continues by outlining the skills needed by the set advisor, namely skill in timing interventions, skill in asking exceptionally good questions, skill in using the language of managers, the skill of saying nothing and being invisible, the skill of hearing two or three processes at the same time, skill in making statements truthfully and the skill to select and apply the appropriate model to reflect processes taking place at a particular time. Drawing on the work of Rogers (1979) McGill and Beaty (2001, p69) highlight three core conditions that the set advisor needs to foster to create a climate of developmental growth. Firstly, the advisor must be genuine, real and congruent; secondly, they should display acceptance and caring; thirdly they should have empathetic understanding.

A variant of action learning which does not follow the normal route of having a set advisor is the 'self-facilitating set'. Here, all the set members share the responsibilities that would normally be undertaken by an advisor. This requires a large sense of commitment on the part of the members, but can work successfully in some settings (Inglis, 1994, p160).

Duration of the action learning programme: Weinstein (1995, p220) states that there is no ideal length for an action learning programme but most programmes last between six and twelve months. She stresses the point that learning, and action learning in particular, takes time. It is important to acknowledge the end of a set and not let it drift into closure. It is fitting to celebrate the process at its end (McGill & Beaty, 2001, p45).

#### **2.4.4. Problem-based Learning**

The fourth approach to learning which has informed corporate education is problem-based learning.



#### 2.4.4.1. Definitions of Problem-based Learning

The concept of problem-based learning (PBL) was popularised in the 1960's as a result of research by Barrows. It was first introduced at McMaster University Medical School in Canada in the late 1960's, followed by several other medical schools in the 1970's in Australia, Maastricht and New Mexico (Schwartz, Mennin and Webb, 2001, p2). PBL is capable of wide definition. Barrows states that PBL "does not refer to a specific educational method. It can be said to have many different meanings". On this basis Barrows determined a taxonomy of problem-based learning methods (1986, p13). However, he did make an early attempt to define PBL as "... the learning which results from the process of working towards the understanding of, or resolution of, a problem" (Barrows and Tamblyn, 1980, p10). Boud and Feletti (1997, p1) present a similar view, "the principal idea behind problem-based learning is....that the starting point for learning should be a problem, a query or a puzzle that the learner wishes to solve". A distinction should be made between problem-based learning and problem-solving learning. Problem-solving learning places the focus on giving students a lecture or article and then a set of questions based on the information given. In contrast, problem-based learning involves handling real scenarios in which the answers are not prescribed or known (Savin-Baden, 2000, p3). Savin-Baden adds that one of the important benefits of focusing on problems is that it helps students to *learn with complexity* and to see that there are often no easy answers (Savin-Baden, 2000, p5). Savery agrees, stating that problems should be ill-structured and allow for free enquiry (Savery, 2006, p13). Margetson (1997, p37) suggests that PBL is not just a different method of learning but rather a different view of learning which has an alternative starting point from traditional educational approaches. It is "a conception of knowledge, understanding, and education profoundly different from the usual conception underlying subject-based learning".

#### **2.4.4.2. Elements of Problem-based Learning**

Characteristics of good PBL problems include: they should engage the student's interest; they should relate to the real world as much as possible; they should be complex enough to engage cooperation from all group members; they should challenge students to develop higher-order thinking skills, such as analysis, synthesis and evaluation (Duch, 2001, p48). Once a problem is chosen, it may be presented to the students in the form of a videotape, an audiotape or as a written account (Engel, 1997, p20). Students work with a faculty tutor who acts as a facilitator of discussion rather than as a direct source of information (Schwartz, Mennin and Webb, 2001, p2). The process of problem-based instruction follows a series of steps. Firstly students attempt to define the broad nature of the problem and explore their existing knowledge as it relates to the problem. Secondly, through discussion, students pose questions called 'learning issues' that relate to aspects of the problem they do not understand. These are recorded and help to focus discussion. Thirdly, students rank these issues in order of importance and discuss what resources will be required to research them. Fourthly, when the students reconvene, they explore the previous learning issues and integrate their new knowledge into the context of the problem. They also define new learning issues as they progress through the problem, recognising that there will always be new issues to explore (Duch, Groh and Allen, 2001, p7).

#### **2.4.5. Distinguishing Terminology**

It is clear from the literature outlined above that four approaches to learning have made an important contribution to a practical orientation to the curriculum, as found within corporate education programmes. These include experiential learning, work-based learning, action learning and problem-based learning. However, the question arises as to the distinction between them and how they interrelate?

Advocates of problem-based learning seem clear that it lies firmly in the experiential tradition. Savin-Baden (2000, p8) argues that problem-based

learning lies within the experiential learning tradition. Torp and Sage (2002, p1) agree that “problem-based learning is an experiential form of learning”. Kirchner, Sweller and Clark (2006, p2) go further by stating that, along with discovery-based, inquiry-based and constructivist approaches, problem-based learning and experiential learning are differently named but pedagogically equivalent approaches. Hmelo-Silver, Duncan and Chinn (2007, p99) believe that this is as step too far. They argue that these different approaches are not equivalent but highly ‘scaffolded’ approaches. Nonetheless, Hmelo-Silver (2004, p236) states that “problem-based learning is focused experiential learning organised around the investigation, explanation and resolution of meaningful problems. The emphasis appears to be that problem-based learning is a distinct form of experiential learning rather than a full equivalent.

Savin-Baden (2003, p16-19) distinguishes between problem-based learning and work-based learning. Work-based learning is located at the workplace with support from the employer and the university, whereas problem-based learning takes place as a component of a higher educational qualification, where the curriculum revolves around problems rather than disciplines. The aim is to prepare people for the workplace. She goes on to argue that action learning has as its essence a focus on the individual and their future action, whereas in problem-based learning the emphasis is on groups functioning as teams to achieve tasks collaboratively. Simpson and Bourner (2007, pp180-1) also make a distinction between action learning and problem-based learning. They argue that in problem-based learning the problems are generally fabricated by academic tutors, whereas in action learning they are related to real life. In problem-based learning the learning outcomes are programmed into the problem when it is created, whereas in action learning the learning outcomes emerge from the problem. In problem-based learning an outcome is sought which best solves the problem in theory, whereas in action learning an outcome is sought to solve a real problem. Finally, in problem learning the key aim is to solve the problem, whereas action learning will generate as much learning about the participant as about the participant’s problem.

Simpson and Bourner (2007, p181) also argue for a clear distinction between action learning and experiential learning. They see experiential learning as including much that lies outside the spirit of action learning. Action learning is a particular form of experiential learning whereby a particular problem is explored through cycles of questions leading to a chosen course of action, observation, reflection and conclusions. Experiential learning is a broader term and covers practices different from, and even incompatible with, action learning.

It is clear from the academic literature that some commonality exists between the four approaches to learning. They have all made a clear contribution to the study of the corporate education process and there does appear to be some overlap between them. Further research is required to fully understand the distinctions and similarities between them. However, the search for definitional purity may be unhelpful. Easterby-Smith (1996, p46) argues “the labels we use are based on agreed meanings; they are subject to challenge and redefinition. No-one has the right to impose meaning on others – this is a liberal and relativist position that I hold with some passion! Attempts to restrict the usage of terms such as self-managed learning and action learning are dangerous because they inhibit experimentation and learning; they privilege the ideas of the past and downgrade experience”. Savin-Baden (2000, p16) has a similar view. Writing in relation to problem-based learning she recognises that describing something as definable that can be contained within boundaries creates two problems. It sets traditional ideas of learning against progressive ones and it sets up misconceptions about what might be seen as a definition and what might not. In conclusion, it may be of more value to follow a pluralist stance towards these well-established approaches to learning, rather than maintain a pointless search for synchronicity. This allows freedom for further exploration and research.

## **2.5. Internal Drivers for Corporate Education**

The rise of corporate education has been driven, not only by academic research into new approaches to learning but also by a wide range of

environmental factors. Internal drivers within university business schools have been of particular importance. At first sight, university business schools have been the success story of late twentieth-century and early twenty-first-century education. No business schools existed in the UK prior to 1965 but by the 1980's there were approximately 120. By 2004 the business and management area accounted for one in seven of all students in British universities and one in five of all postgraduates (HESA, quoted in Slack and Francis, 2005, p2). There has been a similar level of success in the US. In 1955-56, graduate business education was virtually non-existent, with only 3,200 MBA degrees awarded. By 1997-98 this number had grown to over 102,000 (Zimmerman, 2001, p3).

However, despite the obvious successes of the past, many writers have argued that business schools are facing a crisis. As early as the 1960's Zalaznick raised questions about business school curricula stating: "The idea that the graduate school of business is the principal source of top executive talent has been allowed to flourish, unexamined...." (Zalaznick, 1968, p13).

Porter and McKibbin (1988, p64-65) stated that the business school curricula is too focused on analysis, with insufficient emphasis on problem finding and insufficiently integrative across the various functional areas. Pfeffer and Fong (2002, p8) highlight further problems including a focus on teaching rather than learning and a focus on lecture plus case study rather than experiential learning. An AIM research report (2006) highlighted the following problems with business school education: (a) business school research is too abstract and irrelevant to the needs of practicing managers, (b) business school teaching is too theoretical and not sufficiently focused on problems that managers actually face, (c) MBAs and business degrees generally, do not produce well rounded managers with leadership qualities, (d) business education has made almost no impression on practicing managers and has failed to impact business performance, (e) there are too many business schools. Many of those taking degrees in management are unlikely to get much benefit from their studies (AIM Research Report, 2006, p7). Shapinker adds the point that businesses themselves ignore business schools.

Practitioners rarely attend academic business conferences, they pay little attention to business schools and they do not understand the jargon-laden language used by academics (Shapinker, 2008, p1).

MBAs, in particular have come in for a high degree of criticism. Harold Leavitt (1989, p3) asserted: "We have built a weird, almost unimaginable design for MBA-level education" that distorts those subjected to it into "critters with lopsided brains, icy hearts and shrunken souls". One of the most articulate critics of the MBA curricula has been Henry Mintzberg, who states that business schools are attracting prospective students who are too young and do not have sufficient experience for an MBA. Moreover, the MBA curricula are too dependent on theory as opposed to practice, and analysis as opposed to synthesis (Mintzberg, 2004, pp9-68). The consequences of such a wrong curricula are corruption of the educational process, corruption of managerial practice, corruption of established organisations and corruption of social institutions (Mintzberg, 2004, pp69-142). Other writers have joined in the attack. MBAs have faced intense criticism for failing to impart useful skills, failing to prepare leaders, failing to instil norms of ethical behaviour and even failing to lead graduates to good corporate jobs (Bennis and O'Toole, 2005, p1). Bennis & O'Toole add that many leading business schools have adopted an entirely inappropriate and self-defeating model of academic excellence, based on a scientific model that uses abstract financial and economic analysis, statistical multiple regressions and laboratory psychology. The scientific model forgets that business is a profession and must recognise that it is essential to strike a balance between scientific rigour and practical relevance (Bennis and O'Toole, 2005, p2). Holland (2009, p2) also recognises the scientific problem as an issue but adds that business schools foster students who come up with hasty solutions to complicated problems and who focus on maximising shareholder value at the expense of ethical and social considerations. De Angelo et al. (2005, pp1-4) agree that business education has gone wrong but they critique Bennis and O'Toole, arguing that they fail to realise the real problem with business schools. Their view is that US business schools are locked in a dysfunctional competition for media rankings that diverts resources from long-term knowledge creation and pushes the MBA

curriculum towards “quick fix, look good” packaging changes. They also argue that business schools should strike a balance between excessive vocationalism on the one hand and pure science, on the other. A different perspective on the problem with business schools is given by Ghoshal (2005, p76) in the light of Enron and other financial scandals, who argues that, by propagating ideologically inspired amoral theories, business schools have actively freed themselves from any sense of moral responsibility. A reinstitution of ethical and moral concerns is required for the practice of management. Holstein (2005, 2005, p1) believes that the problems lie elsewhere, arguing that business schools need to add some criteria for promotion which includes real world experience. In his view business schools should have a two track faculty, one academic and one practitioner focused which brings into the classroom the world of practice and experience. Even the Harvard Business School has recognised some of the problems facing its world famous brand. Thompson (2008, p2), quoting a study by Harvard professors Datar and Garvin, states that many deans now recognise that the statement “if a company wants new hires, with cutting edge insight, they’d hire an MBA” is no longer true and believe that MBA students do not understand the practice of leadership or have sufficient awareness of their impact on others.

Clearly, business school curricula have not changed and adapted over the years. “Course materials have been upgraded and some class offerings have changed, but the 1960’s product is still quite recognisable....in the 1990’s (Davis and Botkin, 1994, p90). Light (in Thompson, 2008, p5) agrees “We have to understand how the world is changing and make sure we’re preparing our students for the future”. Reasons for the lack of change and adaptability may include cost, lack of staffing for new models that focus on practice, an unwillingness on the part of business schools to change the rules of the game that have put them on top and finally the institutionalisation of existing models and practices (Pfeffer and Fong, 2002, p15).

In a study for the Association of Business Schools, Burgoyne et al. (2003, p12) investigated the issue of applying business school learning within the

workplace. Common problems that emerged were as follows: problems in transferring business school learning back to the workplace; problems in managing practical projects and learning sets within time constraints and the level of support offered by the employer; problems in moving career after study. Overall the study found limited examples of attempts to link business school education with individual performance in the workplace.

Tushman et al. (2007, p15) also highlight the fact that it is not only business school teaching which poses a relevancy problem but business school research also lacks real-world relevance. He quotes Donald Stoke's (1997) book *Pasteur's Quadrant* which provides a taxonomy which classifies research programmes into those that are driven by a quest for understanding (e.g. Neils Bohr and the discovery of the structure of the atom) and those that are driven by a quest for use (e.g. Thomas Edison's development of the phonogram). A third category is the quest for both understanding and use (e.g. Pasteur and the development of microbiology). Tushman et al. (2007, p15) argue that business school research should be characterised by both understanding (rigour) and use (relevance). Van de Ven and Johnson (2006, p5) highlight similar issues in their concept of 'engaged scholarship'. This is a collective approach in which academics and practitioners leverage their different perspectives to co-produce knowledge.

The collective view of many writers in relation to the relevance of much university business school curricula is summed up by Bennis and Toole (2005, p1) "business schools are on the wrong track".

## **2.6. External Drivers for Corporate Education**

Internal concerns within the education sector about the relevance of business education have been echoed by the external concerns of government about the contribution of business schools to the economy and the need for improved partnership working between business and universities. The Lambert Review (2003) was a step forward in recognising the importance of business-university collaboration. The review made a number of proposals for



developing research opportunities between universities and businesses, encouraging more government investment and supporting existing schemes such as Knowledge Transfer Partnerships (Lambert, 2003, p4). In 2004 a joint Forum of the Advanced Institute of Management Research and the Scottish Manufacturing Institute at Herriot-Watt University generated a report to address some of the Lambert recommendations in more detail. They highlighted the point that there is no “one size fits all” approach for business-university collaborations and that context, content and process are all important in this process. In particular their recommendations included: (a) all parties must believe there are appropriate mutual gain and financial outcomes to the collaboration, (b) communication between the two parties must be improved, (c) the assessment of practitioner relevance should be improved in the RAE, (d) promotion criteria in universities should be expanded to include enterprise and outreach activities, (e) a social network analysis should be undertaken to understand the relationships between the key players in the regional economy (AIM Report, 2004, p4).

Governmental concerns have also focused on the employability of graduates, skills development and the need for higher education institutions to be more responsive to employers (Tallantyne, 2008, p57). QAA (2009) uses the recent term “employer engagement” to cover this broad spectrum of ideas. The introduction of foundation degrees in 2001, with its strong emphasis on employer involvement in programme design and review was a step forward in this process (QAA, 2004). The Leitch Report (2006) encouraged the expansion of foundation degrees and reinforced the need for a greater degree of employer engagement, demand and investment. Recommendation 8.22 recommends “widening the focus of HE targets to encompass both young people and adults via workplace delivery. This will dramatically improve engagement between HE and employers” (Leitch, 2006, p140). Subsequently, HEFCE put out a call in May 2006 for projects on “Employer engagement in learning at HE level”. Sixty million pounds in capacity funding was awarded for infrastructure development, followed by an offer in February 2007 of additional student numbers for places co-funded by employers (HEFCE, 2007). Following on from the Leitch Report, a DIUS Research Report presented a

number of conclusions including: (a) the HE sector must do its business of teaching and learning differently in delivering higher education to the workforce, (b) “value” is the critical factor for engaging employers and employees, combined with accessibility, flexibility and responsiveness, (c) the practice of engaging employers is growing, through exciting innovations, (d) success develops when HE providers and employers work closely together, (e) targeted government investment could catalyse a step change in this process (Wedgewood, 2008, p4). In 2008, the Sector Skills Development Agency commissioned a report to inform the employer engagement activity of the Skills for Business network and other public sector organisations. The report defined employer engagement as “any form of contact between any organisation and an employer, that attempts to effect a change in the knowledge, understanding or behaviour of either, or of a third party, for some purpose related to the wider public benefit”. The report highlighted four key phases in the employer engagement process: preparing for the engagement, establishing the engagement, maintaining the engagement and developing the engagement (Cooper et al., 2008, p32). In 2009 a Higher Skills Research Report for HERDA South West and HEFCE examined 27 case studies of HE employer engagement and made a number of recommendations including, identifying project champions, establishing appropriate management and communication structures, engaging academic interest an output, working with brokers and intermediaries, taking a long term view and articulating a clear, coherent and integrated strategy for employer engagement that connects to the other core missions of teaching and research in HE (Bolden et al., 2009, p4). Wedgewood (2008, p20) sums up the importance of employer engagement: “HE is at a critical point”. We need a “new tradition for higher education in which there is a more widespread culture of engagement – of business focus, of ‘close connect’ with professional employment and practice”

A number of wider environmental factors have also helped to create the antecedent conditions in higher education that have positioned a vocational orientation to learning as a “seductive alternative to traditional academic education” (Boud and Solomon, 2001, p23). Employment patterns have undergone considerable changes over the last twenty years. Traditional

career paths have broken down and full-time employment is no longer the dominant pattern. The employment market has seen a rise in part-time, casual and contract work and the development of portfolio contract workers who are responsible for managing their own and skills development and seek to develop lifelong learning. At the same time they face pressures to limit the amount of time spent away from work and will consequently value vocationally oriented education (Brennan, 2005, p6). A further factor is the restructuring, downsizing and outsourcing which have resulted in a decline in the number of large organisations and has led to growth in SME employment, with its demand for higher level skills. Since SMEs have limited numbers of staff it is difficult for them to release them for education and training away from the workplace (Brennan, 2005, p6).

The terms 'knowledge society' or 'knowledge economy', in which new sites of knowledge production have sprung up in all kinds of places, have gained wide currency in recent years (Gibbons et al, 1994, p3). A review of high level training packages in Australia found that the new knowledge is different from knowledge in traditional subjects and disciplines in that it is constructed within the context and environment of the immediate workplace and its value within the organisation may well be short-lived. The new knowledge is rarely the product of individuals but is constructed through collaborations and networks that exist within specific sites and particular contexts (Brennan, 2005, p7). Knowledge is no longer disseminated in a small number of designated locations such as universities or research organisations (Hager, 2000, p 54). Scott (1997, p42) notes "the emergence of new kinds of knowledge institutions, that are not characterised by the same patterns of academic and professional socialisation as the universities and which apparently offer a rival model". He also recognises that "knowledge, conceptually and operationally, has become a much more capacious category; it has spread far beyond academic and/or scientific dimensions".

The global spread of information and communication technologies has played a key role in the compression of time and space and in the migration of ideas. The concept that learning takes place in a classroom and that knowledge is

produced within a university has been disturbed. Every home, by virtue of the internet, is now a potential library (Boud and Solomon, 2001, p24). This has led to the “deinstitutionalization of education” (McIntyre and Solomon, 2000, p13). The combination of databases, electronic journals, video-conferencing and multi-media course packages creates a virtual university (Hager, 2000, p56). McIntyre and Solomon (2000, p89) recognise that globalisation has also played an important part in the changing nature of business education. They present six “discourses” which describe the influence of globalisation on the learning and work environment of the university. The first is corporatisation: the adoption of business management models within the public sector. The second is commercialisation: the application of market economics to educational provision. The third is knowledge commodification which arises out of the marketization of courses. The fourth is internationalisation: new possibilities in the trade in educational products, including the internationalisation of the curriculum and the need for transcultural professionals in the workplace. The fifth is performativity: new parameters through which to judge the efficiency and outcomes of higher education.

## **2.7. Responses to Environmental Drivers**

In response to the changing nature of the environment and the growing criticism within the higher education sector and government, many UK business schools have begun to address the issue of relevance. Pfeffer and Fong (2002, p13) argued that many new programmes concentrate on more experienced students, have a multidisciplinary design, focus on how people think about business issues and have a clinical or action component. The pronounced shift that has taken place from elite to mass higher education over the last 50 years has led to the incorporation of more practice-based areas such as nursing, podiatry and acupuncture (Hager, 2000, p54). Universities have been required to recognise new forms of learning and to recruit practitioners who were originally trained in the vocational and training sectors.

Symes (2000, p38) cites a number of further contributory factors within the HE sector in the move towards a more vocational orientation, namely: the expansion of awards and degrees with a more utilitarian focus such as professional doctorates and masters, the decline of traditional departments such as classics, and the rise of double degrees, which multiply the options of students,. Other antecedents from the HE sector, which have helped to create a foundation for a vocational orientation include work placements and sandwich courses, which allow periods of up to one year in a job as part of an undergraduate degree; independent studies and negotiated learning, in which students create their own degree programmes through negotiation with teachers within HE departments and access and the accreditation of prior experiential learning (APEL). Access programmes provide a bridging programme between work and HE level education and APEL provides recognition of prior work experience which can be credited against academic programmes. A further factor is the rise in emphasis on generic competencies and capabilities. Universities in the 1990s began to engage in the competency agenda, reflected in the development of statements of graduate-ness and learning outcomes (Boud, Solomon and Symes, 2001, p8).

It is clear that a wide range of environmental factors have contributed to the rise of a more practical orientation to the curriculum and indeed to corporate education. These factors have been internal, driven by university business schools in a search for relevance within the curriculum and by corporate organisations in a search for academic credibility and accreditation. Other factors have been external, driven by governmental agendas, globalisation and the rise of information technology. The drive towards corporate education, as an important element within the university business school agenda, appears to be here to stay for the long term.

## **2.8. Conclusion**

This chapter has demonstrated that corporate education has a special nature of its own within the UK higher education setting and presents a distinctive context for academic study. Corporate education is 'conceptually' different to

open education, resting on a utilitarian foundation with roots going back to the work of Locke (1778), Durkheim (1893) and Dewey (1918). It is informed by several academic approaches to learning which include experiential learning, work-based learning, action learning and problem-based learning. These foundations have led to the creation of a different teaching and learning strategy to that offered in open education including a high level of contextualisation to the workplace and a strong emphasis on project work and mentoring. Corporate education is also 'practically' different to open education. It has been driven by a wide variety of internal and external environmental factors which have created momentum and guaranteed its inclusion within the future university business school agenda. Corporate education is closed or semi-closed in nature in that an individual cohort is limited to participants from one organisation or group of organisations within a sector. It also involves a complex set of relationships between the university and the organisation. An important area of difference here has to do with the nature of the customer. In open education programmes the relationship is relatively straight-forward consisting of a relationship between the university and the student, with the university as the service provider and the student as the customer. In the corporate education context the customer is different. The purchaser of the education is normally the organisation and specifically consists of the learning and development team and senior management. In this sense the senior decision-makers (plural) are the customer and the participants on the programmes are the end-users. Additionally, the participants on the programme are themselves relatively senior staff within the organisation and as such have an important voice in the evaluation process.

A further area of difference has to do with the nature of the service provider. In corporate education the corporate organisation often works in partnership with the university to provide the educational experience. This may include co-delivery through guest speaker input, mentoring and facilitation of project teams or it may extend to co-design and co-research. The service provider is therefore both the university and the organisation. The two work in a symbiotic relationship with each other to provide an overall educational experience which has high practical relevance to the mission of the organisation. The

partnership provides an opportunity for a rich level of interaction, co-production and co-creation, whereby the two parties together produce enhanced value for the recipients of the educational provision. As Ryan (2009, p1317) notes there are several benefits to partnership between the university and the organisation. Benefits include opportunities to understand the realities of the workplace, opportunities for cross-pollination between industry and academia and opportunities to make money.

The conceptual and practical distinctiveness of corporate education is summarised within table 4 below.

### **Corporate Education**

<b>CONCEPTUAL</b>	<b>PRACTICAL</b>
<p data-bbox="308 1104 679 1126"><b>Based on UTILITARIAN PHILOSOPHY</b></p> <p data-bbox="347 1211 639 1346"><b>Informed by EXPERIENTIAL LEARNING WORK-BASED LEARNING ACTION LEARNING PROBLEM-BASED LEARNING</b></p>	<p data-bbox="850 1003 1318 1059"><b>Characterised by PARTNERSHIP (including co-creation, co-design and co-research)</b></p> <p data-bbox="850 1081 1318 1137"><b>Characterised by a CLOSED OR SEMI-CLOSED design</b></p> <p data-bbox="858 1160 1310 1216"><b>Characterised by MULTIPLE STAKEHOLDERS acting as both customer and provider</b></p> <p data-bbox="858 1238 1310 1317"><b>Driven by INTERNAL DRIVERS (including the search for relevance and the search for third stream income)</b></p> <p data-bbox="874 1350 1294 1429"><b>Driven by EXTERNAL DRIVERS (including government agendas, globalisation and information technology)</b></p>

Table 4: Distinctiveness of corporate education

The conceptual and practical distinctiveness of corporate education, as opposed to open education, demonstrate that it is a context which is worthy of study in its own right. Corporate education involves complex elements in which the cognitive operations of individual learning and the social processes of an organisation intertwine (Kessel and Plomp, 1999, p679).

## **Chapter Three– Literature Review**

### **Evaluation and Service Quality**

#### **3.0. Introduction**

*Synopsis: This chapter explores evaluation and service quality in relation to corporate education. Firstly, the chapter examines the issue of evaluation and its importance for contemporary business organisations. A wide range of models and frameworks for measuring the value of corporate education are explored, including taxonomy, transfer, systems, decision-making meta-analysis and return on investment perspectives. The chapter examines criticisms of many of these traditional approaches to evaluation and argues that a fresh approach, namely the assessment of expectations and perceptions of service quality, might prove to be a more effective lens through which to explore the evaluation process. Thirdly, the chapter explores the notion of service quality in depth and investigates a variety of service quality models, namely SERVQUAL, SERVPERF and HEdPERF and concludes that, although they have been subjected to a level of criticism, they remain tried and tested models which have made a clear contribution to the assessment of service quality over the years. The chapter recognises that these models have been utilised within a wide variety of industry/sector contexts, especially within the higher education setting, but there is little evidence that they have been applied to the context of corporate education, thus presenting a gap in knowledge which is worthy of further research. Finally, the chapter presents the model upon which this research study will be built, namely a SERVQUAL-informed approach which is modified and adapted to a corporate education context.*

#### **3.1. The Evaluation of Corporate Education**

Organisations increasingly want value for their investments and this is nowhere more evident than in the concern for value in corporate education. However, pressure on education budgets, combined with managerial scepticism, has resulted in a fear that much of the HR budget is being poured down a black hole with few tangible benefits to the organisation.



*“There is a paradox at the heart of Western corporates, and it is this: while many organisations plough thousands of dollars to train their employees, many managers don’t think it is worthwhile” (Development & Learning in Organisations, 2008, p34).*

This is an issue of great concern to human resource professionals and as a result evaluation has grown to such a level of importance that it has become learning and development’s ‘holy grail’ (Redford, 2007b, p1).

### 3.1.1. The Purpose of Evaluation

Kirkpatrick (2007, p17) proposes three reasons as to why corporate education programmes need to be evaluated. It justifies the existence and budget of the learning and development team’s department by showing how it contributes to the organisation’s objectives and goals. It helps to decide whether a programme should be continued or discontinued. Finally, it helps to gain information on how to improve future programmes. Easterby-Smith (1994, p13) provides four general purposes for evaluation. Firstly, ‘proving’ which aims to demonstrate conclusively that something has happened as a result of developmental activities. Secondly, ‘controlling’ which determines whether the programme is going to plan. Thirdly, ‘improving’ which implies an emphasis on trying to ensure that the current or future programmes and activities become more effective for the future. Finally, ‘learning’ which recognises that evaluation cannot be divorced from the processes on which it concentrates and is an integral part of the learning and development process itself. The grid below distinguishes between summative and formative evaluation. Summative evaluation is about proof and formative evaluation is about improvement.

PURPOSE	PROCESS	OUTCOME
SUMMATIVE	CONTROLLING Is it going according to plan?	PROVING Is it achieving what was intended?
FORMATIVE	IMPROVING Is there a better way of doing what we are trying to do?	LEARNING Can we re-visualise what we are trying to do?

Table 5: The Purposes of Evaluation (Easterby Smith, 1994)

Bramley (1996b, p4) provides further purposes of evaluation, namely; feedback to participants and trainers, control for the organisation, research which adds to the overall knowledge of training principles and practice, intervention in the human resource procedures within an organisation and finally, an opportunity for trainers to understand the power games within organisations. Bramley (1996a, p9) adds a further list of reasons for evaluating training which include improved quality of training activities, improved ability of the trainers to relate inputs to outputs, better discrimination of training activities between those that are worthy of support and those that should be dropped, better cooperation between trainers and line managers and closer integration of training aims and organisational objectives. In considering all these arguments, Burgoyne and Cooper (1975, p53) make a helpful distinction between two overarching purposes of evaluation. Evaluation can be helpful in a particular context which provides data about an intervention or it can be understood as pure research that increases the body of knowledge about the effectiveness of educational methods. Both perspectives are important.

Kraiger et al. (1993, p312) note that the terms evaluation and effectiveness, are often used interchangeably, but in reality they address different research questions. Evaluation is linked to measurement and design and refers to a system for measuring whether trainees have achieved learning outcomes. Effectiveness, in contrast, is concerned with why training did or did not achieve its learning outcomes. Kraiger et. al. (1993, p323) also provide a classification scheme for evaluation which includes cognitive, skills, affective, attitudinal and motivational outcomes.

Despite the obvious benefits of evaluation, Rae (2002, p7) recognises that the risks can be high. Excessive numbers of tests, questionnaires and interviews can make learners feel that they are getting in the way of learning. Schedules may be so tight that there is no space available for evaluation. The purse-string holders may also have little understanding as to why evaluation is important arguing 'you should be spending your time and money on training not evaluation!'

### **3.1.2. Definitions of Evaluation**

Bramley (1996a, p4) states that “evaluation is a process of establishing the worth of something”. Thackwray (1997, p4) has a similar definition suggesting that evaluation is “finding out and agreeing if what you are doing is worth doing, if you are doing it well and how you can do it better”. Guskey (2000, p41) agrees stating that evaluation is the systematic investigation of merit or worth. However, he notes a difference between merit and worth. Worth relates to the organisation’s mission and its perceived value to the organisation’s stakeholders. Merit is a property of the programme itself and should be judged against established standards of excellence within the profession. A programme may have great merit but be of little worth to the organisation. Goldstein (1993, p147) demonstrates the importance of information gathering in this process by defining evaluation as “the systematic collection of descriptive and judgemental information necessary to make effective decisions related to the selection, adoption value and modification of various instructional activities”. Rae (2002a, p70) provides a holistic definition stating that evaluation is “the assessment of the total value of a training programme, training system or training course in both value – and cost effective terms.... it includes all the pre-course action, the post course action and the post course implementation of the learning by the learner back at work”.

## **3.2. Evaluation Models**

### **3.2.1. Early Perspectives**

One of the earliest models of evaluation was developed by Ralph W. Tyler in his evaluation work in the 1930’s and 1940’s. Tyler (1949, p4) believed that the first step in any evaluation is clarification of the programme’s goals. Once these are specified, evaluation can focus on the extent to which these goals have been achieved. Tyler’s model includes a series of steps: establish broad goals or objectives, classify or order the goals, define the goals in observable terms, find situations in which achievement of the goals is demonstrated, develop measurement techniques, collect performance data and compare the

data with the stated objectives. Tyler's work brought direction, clarity, order and objectivity to evaluation processes, qualities which were lacking in evaluations prior to his work (Guskey, 2000, p49). In the 1960's Metfessel and Michael (1967) proposed a model of evaluation that extended Tyler's model in two ways. It emphasised the inclusion of multiple constituencies throughout the evaluation process. Secondly, it expanded the methods of data collection that might be used in evaluations. Metfessel and Michael's (1967, p940) model comprised an eight step model including: involve the total school community as facilitators in the evaluation process, formulate a cohesive model of goals and objectives, translate objectives into a communicable form, select instruments to furnish measures allowing inferences about programme effectiveness, carry out periodic observations using content-valid tests, analyse data using appropriate statistical methods, interpret the data using standards of desired levels of performance, develop recommendations for the further implementation, modification and revision of broad goals and specific objectives. Tyler's work was further extended by Hammond (1973, p160) who proposed an even more detailed structure for evaluation. Hammond believed that it was important to know, not just whether, but 'why' goals were attained. He created a three-dimensional model to organise the factors that impinge on goal attainment. These factors included: organisation, content, method, facilities and cost. He also distinguished between the characteristics of the different individuals or groups involved in the programme. These included students, teachers, administrators, educational specialists, family and community. These many factors led to a large set of 90 cells, which made evaluation highly complex. In contrast to Tyler and Hammond, Scriven (1972, p5) developed a goal-free evaluation model. A goal-free evaluation concentrates on the 'actual' outcomes of a programme rather than on only those that are intended.

### **3.2.2. The Taxonomy Perspective**

The most famous and most quoted model on training evaluation and the one of which most trainers and developers are aware, is the model created by Kirkpatrick, developed in the 1960's but made popular in the 1970's (Kearns,

2005, p39). The Kirkpatrick model has become a “global taxonomy” which enables people to consider evaluation criteria (Alliger and Janak, 1989, p339). The model comprises four levels, namely reaction, learning, behaviour and results. Kirkpatrick defines the first level, ‘reaction’, as “how well trainees like a particular training programme. Evaluating in terms of reaction is the same as measuring trainees’ feelings”. It is a measure of customer satisfaction (Kirkpatrick, 2007, p21). As Thackwray (1997, p18) points out, reaction is easy to measure and easier to quantify and nearly all training and development managers use it, however it is often the only evaluation method used. Kirkpatrick suggests that trainers should determine what they want to find out, use a written comment sheet, design the sheet such that reactions can be tabulated and quantified, obtain honest reactions by making the sheet anonymous and finally allow participants to write additional comments, not covered by the other questions (Kirkpatrick, 2007, p28). The second level in Kirkpatrick’s model, ‘learning’, recognises that trainees might react favourably but may not have actually learned anything of real significance. Learning, therefore focuses on how participants have changed attitudes, improved knowledge or increased skills as a result of attending the training programme (Kirkpatrick, 2007 p22). Kirkpatrick (2007 p43) offers the following guideposts to measuring learning. Firstly, measure the learning of each trainee so that quantitative results can be determined. Secondly, use a before-and-after approach so that learning can be related to the programme. Thirdly, the learning should be measured on an objective basis. Fourthly, a control group (not receiving the training) should be used to compare with the experimental group that receives the training. Finally, the results should be analysed statistically so that learning can be proven in terms of correlation or level of confidence. The third level in Kirkpatrick’s model, ‘behaviour’, highlights the distinction between *knowing* about something and actually *doing* it. It is the extent to which changes in behaviour have occurred as a result of the participant attending the training programme. Kirkpatrick states that trainees must want to improve, must recognise their own weaknesses and must work in a permissive climate. They must also have help from someone who is interested and skilled plus have opportunity to try out new ideas. He offers further guideposts as to how to develop behavioural changes. The first is to

appraise performance before and after the development action has taken place. The second is to have the appraisal conducted by peers, staff developers, departmental heads or colleagues. The third is to statistically analyse the results to compare before or after performance. The fourth is to have a post training appraisal three months or more after the training action. The fifth is to use a control group. The final level in Kirkpatrick's model, 'results', is the most difficult to determine and can be defined as the final results that occurred because the participants attended the training programme (Kirkpatrick, 2007 p25). This might include how much quality, productivity, turnover or sales figures have improved as a result of the training. It asks "what is the return on investment for all the money spent on training" (Kirkpatrick, 2007, p64).

The Kirkpatrick model has been criticised over the years. Kearns believes that the Kirkpatrick approach should really be stated as a five level model. Greater importance should be given to pre-measurement, the 'baseline score' before the main training takes place. Kearns argues that measuring training after it has been implemented is too late in the learning cycle and that baseline measures are indispensable (Kearns, 2005, p40). This view has led Kearns to develop his Baseline, Added Value, Evaluation and Learning Model which is an adapted version of Kirkpatrick (Kearns, 2005, p54). Rae (2002b, p4) terms this concept of pre-measurement, level 0, in line with Kirkpatrick's model. Kearns also argues that Kirkpatrick completely misunderstands level four, results. He states that the only way to 'e-value' training is to show its true value. Making a distinction between basic value and added value, he stresses the importance of expressing the value in monetary terms through cost reduction or increased outputs and revenue (Kearns, 2005, p49). Thackray states that this monetary element requires a further level to be added to the Kirkpatrick model, namely return on investment: did the monetary value of the results exceed the cost of training? (Thackray, 1997, p25). Phillips (1991, p7) also recognises the importance of adding return on investment as level 5, and used this concept to create his return on investment model. He states, the four level framework developed by Donald Kirkpatrick...does not focus directly on the return on investment issue....the fifth level of evaluation is developed

by collecting level 4 data, converting the data to monetary values, and comparing them to the cost of the programme to represent the return on training investment". Kearns (2005, p51) criticises Phillips arguing that it is questionable as to whether his level five is necessary since real monetary value can be ascertained at level four. He also reiterates that the monetary value should ideally be specified at the baseline level, before training begins, rather than post training. Further suggestions for a fifth level to be added to the original Kirkpatrick model include training's ultimate value in terms of organisational success criteria, namely economic benefits or human good (Hamblin, 1974, p23) or societal value (Kaufman and Keller, 1994, p379).

Sutton and Stephenson (2005, p360) argue, based on research of a wide range of organisations within the UK, that very few organisations in practice manage to reach Kirkpatrick's level three or beyond. Level 3 and 4 requires (a) transfer of techniques and skills from the learning programme to the workplace, (b) sharing of knowledge and experience, (c) transforming, whereby people show signs of new ways of thinking and working, (d) embedding into wider organisational goals and finally (e) championing whereby people recommend their experiences to others.

A range of further models relating to training evaluation have been articulated over the years. Hamblin has produced a similar model to Kirkpatrick's – a five level model. The five levels are reaction, learning, job behaviour, organisational effects and ultimate value (Hamblin, 1974, p13). The Industrial Society (1994) has developed a 'carousel' or 'endless belt of development model. The model comprises six stages, namely, recognise a business need, define development objectives, design the learning process, experience the learning process, use and reinforce learning and finally, judge the benefit to the organisation (cited in Thackwray, 1997, p30). Sutton and Stephenson (2005, p369) have also provided a framework which they claim goes beyond Kirkpatrick's model. It is a 5-stage model which includes determining the decision-makers' information needs, setting programme goals, designing & piloting the evaluation regime, monitoring and controlling the programme and demonstrating/sharing information about accrued value. A further approach to

training evaluation has been developed by Bernthal (1995, p41) who identifies seven steps in the setting up of a long distance, in-depth evaluation programme. These include: identify the organisation's values and practices, identify skills, knowledge and attitudes, define the scope and purpose of the evaluation, identify data sources, choose the best method for collecting data, select the best measurement approach and finally gather and inventory your resources. In step three, define the scope and purpose of the evaluation, Bernthal goes beyond Kirkpatrick's four levels to include, the quality, delivery and retention of training; whether the training and development action solved a problem or an issue for a particular group of staff; how useful is parallel training for managers and their staff; variables in the work environment that discourage or facilitate the effect of training and finally, organisational context (Bernthal, 1995, p41).

### **3.2.3. The Transfer Perspective**

Baldwin and Ford (1988, p9) present an alternative approach to the debate, which focuses less on evaluation and more on the learning transfer process. Transfer is defined as "the degree to which trainees effectively apply the knowledge, skills and attitudes gained in a training context to the job. For transfer to have occurred, learned behaviour must be generalised to the job context and maintained over a period of time on the job". This conceptual framework is important to the development of later models of evaluation. Baldwin and Ford also analyse a wide body of existing literature and outline three main phases: training inputs, training outputs and conditions of transfer. Training inputs include trainee characteristics, training design and work environment. Training outputs includes handling learning and retention whilst conditions of transfer concerns generalisation and maintenance.

Based on Baldwin and Ford's transfer of learning approach, Holton (1996, p9) proposes an evaluation model which accounts for the impact of primary and secondary intervening variables. He suggests three primary outcome measures, namely learning, individual performance and organisational results. Notable features, in contrast to the Kirkpatrick model, include the absence of



reactions as a primary outcome and individual performance used instead of behaviour. Holton recognises the influence that trainee reactions, motivation to learn and ability have on learning outcomes. He also notes the influence that the variables of motivation to transfer, transfer conditions, environment and ability have on performance outcomes.

D' Netto et al (2008, p4) cover similar ground with their “predictors of management development effectiveness”. They outline a three stage approach to management development that includes assessment of development needs, conducting the development programme and evaluating the programme. The focus is on two groups of variables, namely antecedent components and post-programme components. Antecedent components include organisational learning culture, individual initiative, top management support and link to corporate strategy. Post-programme components include post-programme evaluation, line manager support and opportunities for skill utilisation. Along with the Baldwin and Ford and Holton models, this model recognises that a wide range of factors outside of the delivery of a programme are important. Collins and Denyer (2008, p172) agree that it is important to understand the intricacies and contextual factors that lead to various levels of success in training programmes.

#### **3.2.4. The Systems Perspective**

The importance of context is also highlighted in a range of so-called systems models, which have contributed to the evaluation debate. An early example is the CIPP model proposed by Stufflebeam (1971). This model focuses on decision-making processes, particularly those made by policymakers and administrators. CIPP is an acronym based on context, input, process and product. Context evaluation is used to make planning decisions. It identifies the problems, needs and opportunities that exist in an educational setting. Input evaluation focuses on structuring decisions. Process evaluation provides information for implementation decisions and product evaluation focuses on recycling decisions (Stufflebeam, 1971, p22).

Warr, Bird and Rackham (1970, p4) produced the CIRO method of evaluation. CIRO involves context evaluation (determining whether there is a need for action and forming objectives), input evaluation (the best method of delivery), reaction evaluation (determining participants' reactions based on reports and interviews) and outcome evaluation (using results to inform future planning).

A further approach, emphasising context, is the CIMO model advanced by Collins and Denyer (2008, p170). This framework (Context, Intervention, Mechanism and Outcome) states that to “understand outcomes (O) it is important to focus on certain hypotheses about mechanisms (M) through which an intervention seeks to bring about change as well as recognising the contextual conditions (C)“.

### **3.2.5. The Decision-making Perspective**

Patton (1997, p13) suggests the concept of ‘utilization-focused evaluation’ which starts with the question “what decision(s) do we want to be able to make better as a result of the evaluation”. Voller (2011, p26) argues that Briner et al’s (2009) Evidence-based Management Model (EbMgt) helps to re-frame evaluation as part of a wider decision-making process. EbMgt involves making decisions through the use of four sources of information, namely practitioner expertise and judgement; evidence from the local context, a critical evaluation of the best available research evidence and the perspectives of those people who might be affected by the decision. All four of these elements need to be brought together to create optimal decision-making. Voller (2011, p26), in a research study at Ashridge, found that all four elements were involved in the decision-making process but not all were being used to best effect. The findings also revealed that there are usually one or two critical individuals behind the initial decision to commission a programme but there are a variety of further stakeholders involved alongside them. The main contribution of evaluation to the decision-making process is in modifying and improving the design after training has taken place. Finally, evaluation also contributes to the decision as to whether to continue with further iterations of the programme in future (Voller, 2011, pp28-29). Hirsh and

Burgoyne (2009, p33) highlight the importance of the timeframe for decisions. This involves leaving enough time post-training to complete evaluation before the next training cohort begins.

### **3.2.6. Meta-Analysis Perspectives**

In addition to empirical studies on management development evaluation, several meta-analyses have been conducted which survey the literature over a number of years. The aim is to quantitatively aggregate the results of primary studies to determine whether management or leadership development works. They provide the opportunity to investigate relationships over a range of empirical studies (Arthur et. al., 2003, p123).

Alliger and Janak (1989, pp332-337) conducted an early meta-analysis, investigating a wide range of articles relating to Kirkpatrick. According to Alliger and Janak the Kirkpatrick model is underpinned by three implicit assumptions, which Kirkpatrick may or may not have intended. Firstly, the levels are arranged in ascending order of information provided. Secondly, the levels are causally linked. Thirdly, the levels are positively correlated. However, only limited evidence of correlations has been discovered. In an investigation of over 200 articles on training evaluation, only 12 articles reported 26 correlations. As Holton states, “attempts to test causal assumptions within a taxonomy are futile because, by definition, taxonomies classify rather than define causal constructs” (Holton, 1996, p6). Building on the meta-analytic work of Alliger and Janak in 1989, Alliger et al. (1997, p348) conducted a further study using 34 more recent articles and reported 115 correlations. Whilst this is more interesting than the outcomes of the original study, Alliger et al. also acknowledge that there are limitations to their study: there are very few publications on level 4 criteria and Kirkpatrick’s model itself has its own shortcomings.

Burke and Day (1986, p232) also conducted an early meta-analysis in which they set out to determine the effectiveness of management and leadership development programmes. 70 managerial training studies were investigated,

focusing on three questions about the overall effectiveness of managerial training, the relative effectiveness of different training types and the relative effectiveness of different training methods. In the study six training content areas, seven training methods and four types of criteria (subjective learning, objective learning, subjective behaviour and objective results) were investigated. The overall results were rather general arguing that “managerial training is, on the average, moderately effective”. Nonetheless, Collins and Holton (2004, p234) state that Burke and Day’s study is “legendary” and “commonly regarded as the principle empirical support for the effectiveness of managerial training and leadership development programs”. Collins (2001, p43) conducted a further study, following on from Burke and Day, in which she analysed 54 studies on leadership development research aimed at determining the extent to which the intended outcomes of the leadership development programmes focused on organisational performance. The findings demonstrated that only 16 of the studies focused on organisational performance and that the effectiveness of leadership development programmes remained mixed.

In a further study, Arthur Jr. et al. (2003, p236) examined 636 articles from the training and development literature, from 1960-2000. The research questions were as follows: does the effectiveness of training vary systematically as a function of the evaluation criteria used?; what is the relationship between needs assessment and training effectiveness and what is the observed effectiveness of specific training methods as a function of the skill or task being trained? The results indicated that training effectiveness decreases from learning measures through to behavioural and results measures. This is attributed to the social context and environmental favourability of the post-training environment. The relationship between needs assessment and training effectiveness was uncertain with no clear pattern emerging. In terms of choice of training method, the results suggested that the effectiveness of organisational training does vary according to the training delivery method, the skill or task being trained and the criterion being used to operationalise effectiveness (Arthur Jr. et. al., 2003, p243).

Building on the work of Burke and Day (1986), Collins and Holton (2004, p232) reviewed 83 studies of managerial leadership development published between 1982 and 2001. The results found that “the effectiveness of managerial leadership programs varied widely: some programs were tremendously effective, and others failed miserably”. Collins and Holton also created a six-type classification with which to measure managerial leadership effectiveness: knowledge-objective, knowledge-subjective, expertise-objective, expertise-subjective, system-objective and system-subjective. Knowledge outcomes were found to be highly effective whilst expertise and systems outcomes gradually dropped in effect size across different designs (Collins and Holton, 2004, p237).

Both Burke and Day’s (1986) and Collins and Holton’s (2004) analyses contained tight inclusion criteria as to the number of empirical studies involved. This restricted the analysis and creates a degree of uncertainty over the findings. The effects of moderating variables, such as quality of trainer, training content and organisational climate were not incorporated into the analyses. The reduction of empirical studies into an integrated meta-analysis involves a sacrifice of richness of information. Meta-analyses are useful for demonstrating overall effectiveness but do not answer the ‘why’ questions. They also place a strong reliance on a quantitative approach rather than using qualitative data. Nonetheless, meta-analyses are helpful in aggregating a wide range of data and provide templates for categorising variables such as intervention type, training method, research design and outcome levels (Voller, 2010, p13).

### **3.2.7. Recent Perspectives**

A useful framework created by Russ-Eft and Preskill (2005, p75) suggests a systems framework for programme evaluation. The framework includes the external environment, the internal environment and the organisation’s mission and goals. The advantage of this approach is that it “places the evaluation process within the larger context of the organisation so that it is not an add-on activity but one aligned with the organisation’s strategic goals and processes.

Eiter and Halperin (2010, pp5-8) argue that a transition has taken place in recent years from evaluation as an isolated post-programme activity to an integral part of the programme design process. Quoting a consultant Jon Fay of Wilson Alan, they have termed the phrase “a portfolio of measures”. These include a range of quantitative and qualitative measures including process measures, satisfaction measures, progress measures, usage measures and business value measures. They add to this list a series of alternative measures which include net promoter score, company buzz, and measures of personal reputation.

Meister and Willyerd (2010, p22) present an interesting contemporary perspective, asserting that traditional learning has been based on building competencies through formal programmes which are created and implemented through a top-down approach. In contrast, social media platforms allow learners to create and manage their own content in a just-in-time, on-the-job context. They suggest “a movement towards learning occurring in peer to peer communities of practice that are organic, emergent and definitely not controlled only by HR or senior executives”.

### **3.3. The Limitations of Evaluation**

Hirsh and Burgoyne (2009, p31) present a number of reasons as to why practitioners find evaluation a definite challenge. Evaluation, especially at the higher levels can be “difficult, costly or even impossible”. The search for return on investment, in particular may feel like an “impossible mountain to climb”. Equally, some practitioners feel that if the evaluation is not perfect then it is not worth doing at all or they feel it is better not to know whether training is effective as this may generate bad news. Finally, learning and development includes many contemporary approaches such as support to teams, OD interventions, coaching, talent management and career development. The question remains as to how these are to be evaluated.

Thackwray (1997, p37) admits that proof of training effectiveness is very hard to attain. It is unlikely that it can be satisfactorily proven that a particular

training programme or development action has actually caused the benefits claimed. The critical issue is to find a collection of evidence that suggests or preferably demonstrates a causal relationship between action and results. Guskey (2000, p87) agrees, stating that it is impossible to obtain ironclad proof. Nearly all professional development takes place in complex real-world settings. One aspect of the problem is that most evaluators tend to believe in monocausality, in other words a single evaluation action can be used to answer all questions. This does not take into account ambiguous findings and the fact that many variables may be in play (Thackwray, 1997, p27). There are too many intervening variables to allow for simple casual inferences. Isolating the effects of a single programme or activity under such conditions is usually impossible. However, in the absence of proof, you can collect very good evidence. Board members rarely ask “Can you prove it?”. What they ask for is evidence (Guskey, 2000, p87). The difficulties of obtaining proof are a reminder of the Easterby-Smith framework outlining the purposes of evaluation which adds controlling, improving and learning as important purposes in the evaluation mix (Easterby-Smith, 1994, p13).

### **3.4. A Further Look at Return on Investment (ROI)**

“Not everything that can be counted counts, and not everything that counts can be counted” attributed to Albert Einstein (Seldon, 2011, p2).

One of the most noteworthy attempts over the last 30 years to obtain proof within evaluation is the notion of return on investment (ROI), often described as the “holy grail” of management development (Redford, 2007b, p1). Return on investment, in relation to training and development, is the analysis of how much the training costs and whether the organisation has received any benefit of equal or greater value (Platt, 2006, p1). Thackwray (1997, pp48-54) outlines a range of financial approaches that are used to evaluate training programmes. Cost/benefit analysis is a comparison of all the costs of a training action against all the benefits. It is derived from the formula:  $\text{net benefit} = \text{total benefit} - \text{total costs}$ . Payback looks at how long it will be before the total benefits of training actions exceed the total costs. It is derived from

the formula:  $\text{payback period} = \text{total investment} \div \text{annual savings}$ . Profitability is net income i.e. what is left after every item of expenditure has been taken into account. Other approaches that are sometimes used include utility analysis, transfer pricing, pay forward, impact analysis and trend. By far the most developed approach to the financial calculation of training and development is return on investment. Kearns (2005, p65) argues that return on investment can be understood from three different perspectives. The first is return on investment as a concept, which anyone can understand even if they choose not to physically measure the £'s generated. The second is return on investment as a management tool, which helps to check that the hypothesis behind the training is valid and sound. The third is return on investment as a practical formula, which produces real figures to prove the financial return on training. In this regard, he presents a simple formula for calculating return on investment, which includes: the gross benefit achieved from training, the cost of training (above the line), the net benefit achieved from training, the costs of training (below the line), net ROI,  $\times 100\%$ , per annum payback period in years. Redford (2007a, p1), quoting the Marketing Director at Communicaid, provides four top tips for measuring return on investment, (a) before measuring return on investment make sure the training solution is aligned with core business needs, (b) use an ongoing skills audit to provide evidence of why training in specific areas is needed, (c) be clear on objectives and identify key performance indicators (KPIs) to measure training against, (d) estimate outcomes from the start - only start a training programme when the initial expectation of benefits improvement is justified by the cost.

One of the strongest proponents of measuring return on investment for training in recent years has been Jack J. Phillips. He highlights the benefits of return on investment as including: it measures the impact of training, it helps to set training priorities, it focuses on results, it earns respect from senior executives and sponsors and it alters management perceptions of training (Phillips, 2003, p24). He states that there has been a strong progression of implementation of return on investment in the US from the manufacturing sector to other sectors such as the service sector, the health care sector, the



non-profit sector, the public sector and the educational sector (Phillips, 2003, p4).

### **3.5. Criticisms of the Return on Investment Approach**

Kearns, with Jack Phillips and his associates in mind, cautions against what he calls an 'American obsession' with trying to actually measure return on investment (Kearns, 2003, p65). Despite his great enthusiasm for measuring return on investment, Phillips himself recognises that there are barriers to its implementation, which include: costs and time, a lack of skills and orientation on the part of human resources staff, faulty needs assessments, fear, lack of discipline and planning and false assumptions (Phillips, 2003, p22). Valuation attempts are not always easy. Whilst it is relatively easy to identify and assign monetary values to most of the costs associated with training, it is much more difficult to do the same with benefits. The valuation of improved morale and reduced stress levels, for example, are problematic (Murray and Efendioglu, 2007, p373). Burgoyne et al. (2003, p25) argue that return on investment approaches are based on questionable assumptions and estimates. It is more easily applied to task-based training rather than to management learning. In a survey of British Business Schools they found only one example of a return on investment approach being applied to management education. Writers also argue about exactly what should be measured. Chang (2003, p3) recommends that for employees directly involved with producing sales revenue it is the change in revenues that is important. Farrell (2005, p24) argues that employee turnover is the best measure. Other writers argue that the benefits of training must be measured by identifying changes in key operating activities directly related to an organisation's goals and objectives. Campbell (1994, p35) recognises these as employee morale, workforce stability, lower absenteeism, job satisfaction, supervisory skill development and improved customer relations, but agrees that they are hard to quantify. Phillips (2007, p36) adds to this list changes in the organisation's commitment, teamwork and customer complaints. Lengermann (1996, p365) argues that the change measured should be a firm's productivity net of changes in employee salaries that are the result of training, while Tobin

(1998, p32) focuses on changes in business outcomes that are evidenced in improved job performance. ASTD (a national professional organisation for training) reports that their related organisations use employee and customer satisfaction, quality of products and services, cycle time, retention, revenue and overall productivity as their measures (Ketter, 2006, p32).

Contemporary academic researchers and organisational practitioners have expressed some scepticism about the measurement of return on investment for training. Research at Ashridge Business School in 2004, which targeted 156 HR professionals and 114 sponsors, mainly CEOs, managing directors or general managers, found that less ROI measurement is happening than one might think. Whilst 86% of respondents are evaluating at Kirkpatrick's level one, only 42% are evaluating at level 2 and 30% at level 3. Only a small proportion are evaluating at level 4 (11%) and even less at Phillips level 5 (3%). This raises the question: if ROI is such a burning issue, why are so few respondents regularly attempting it? (Charlton and Osterweil, 2005 p9). Eiter and Halperin (2010, p4) argue that many researchers in the field today contend that return on investment is not necessarily what the client wants or needs and is not the best approach to answering the organisation's evaluative questions. Redford (2007b p1) goes further and expresses a very pessimistic view of return on investment, "measuring the return on investment of training is one of learning and development's holy grails. The good news for unbelievers and ROI laggards is, that it's probably a waste of time". She articulates three reasons for this view. Firstly, it is not cost efficient. The time spent on trying to use complex formulae is too much compared to knowing the return on investment of training. Secondly, there are serious doubts about the robustness of return on investment formulae. They have too many variables and the calculations are not worth the paper they are written on. Thirdly, most organisations are not interested in learning and development figures anyway. Research at Ashridge Business School reveals that sponsors of executive education may not be as wedded to proof of return on investment as many human resource professionals assume (Charlton and Osterweil, 2005, p13). Human resource professionals may be overly concerned with finding return on investment, whereas CEOs and managing directors are more concerned with

maximising the training and ensuring it is applied. The constant quest for return on investment smacks of HR trying too hard to justify itself (Bentley, 2006, p1). Kearns (2005, p63), whilst positive about calculating return on investment, also recognises that the quest for ROI is often used to prove the benefits of training, in order to justify training spend and therefore ensure the existence of the training department. These aims are often symptomatic of training departments in trouble, rather than genuine attempts to add value to the organisation through learning.

### **3.6. Return on Expectations (ROE)**

It is clear that many of the traditional methods of evaluation with their emphasis on outcomes and return on investment have been received with a degree of scepticism and cynicism by contemporary scholars. This prompts the question as to whether a different approach might be required for the future. Voller (2010b, p8) in an unpublished paper on the Ashridge perspective on evaluation, hints at one alternative. She states that “we have found that focusing on return on expectations (ROE) is more helpful than seeking to reach the ‘holy grail’ of evaluation, measurement of return on investment (ROI)”.

The concept of ‘return on expectations’ has not been studied in depth within the evaluation literature. However, several writers have acknowledged the importance of stakeholder perspectives. Stake (1975, p43), early in the debate about evaluation, highlighted the importance of stakeholder dimensions in the evaluation process. In contrast to the goal orientated approach of Kirkpatrick, Stake coined the phrase ‘responsive evaluation’ which recognises that evaluation is a highly political activity. He argues that evaluation should consider the interests of the various stakeholders, such as agents, beneficiaries and victims. The interests of stakeholders are divided into claims, concerns and issues. Evaluators need to determine who the stakeholders are. Martineau (2004, p1) presents a set of three key questions. Who has a vested interest in the evaluation? Are there additional people whose support is required for the evaluation? Who has decision-making

responsibility with respect to the evaluation? Thackwray (1997, p38) argues that evaluators should ask three questions of stakeholders. Why is this training and development action important to them? What actually is their stake in it? What values, biases or experiences might influence their judgement about the programme? Michalski and Cousins (2001, p37) also highlight the importance of stakeholder perceptions in training evaluation. In a study of a global telecommunications network development firm, they analysed the perceptions of 15 people in 3 stakeholder groups within the organisation and found a multiplicity of stakeholder views. One approach to assessing the perceptions of different stakeholders in management learning is Kaplan and Norton's balanced scorecard, which is used by employers both formally and informally. Burgoyne et al. (2003, p26) argue that, by using this tool and assessing views of different stakeholders such as participants, line managers, senior managers, management development staff and business school staff, this approach may make a contribution to management education evaluations and help to assess organisational impact.

Greene (1997, p25-32) adds an important cautionary note to the debate over stakeholders, by distinguishing between evaluation and advocacy. She recognises that in most evaluation programmes there is an intention not to take sides and to "equitably advance the interests of multiple stakeholders". Evaluation seeks "to judge fairly the quality, merit and worth of a program based on impartial, scientifically gathered information". In reality, however, advocacy in evaluation is inevitable and most evaluation approaches are distinguished by exactly whose questions and criteria are adopted. "To advocate is to espouse and promote a partisan belief or stance, to embrace and advance a cause" Objectivity and value-neutrality are worthy aims but difficult to promote in practice. Greene also argues that the evaluator is best positioned as an explicit advocate for pluralism to ensure that the debate on evaluation includes multiple voices and perspectives. Hirsh and Burgoyne (2009, p32) go further in suggesting that the varying stakeholder perspectives themselves should be made more explicit so that evaluation approaches can cope with the different questions being asked and the political dimensions of the answers they are seeking. Markiewicz (2005, p13) emphasises the

importance of negotiation as an important component in the early stages of an evaluation and Alkin et al. (1997, p33) highlight the necessity for the evaluator to have the interpersonal and political skills necessary to maximise stakeholder participation. There are three main models which outline the involvement of stakeholders in the evaluation process. The first is the stakeholder-directed approach whereby the authority and initiative for the evaluation arises from the stakeholder group. The second is the stakeholder-collaboration model, which involves both stakeholders and the evaluator in joint planning and reporting the evaluation results. The third is the stakeholder-based model which involves the stakeholders but keeps the evaluator in control of the entire process (Ayers, 1987, p266). A further contribution to the debate as to who should be involved in the evaluation process is the concept of 'participatory evaluation'. Cullen et al. (2011, p347), coming from an international development evaluation perspective, propose a three dimensional framework, based on a previous framework developed by Cousins and Whitmore (1998). The first dimension focuses on who holds control of the evaluation process (the stakeholders or the evaluator). The second dimension outlines the extent of stakeholder participation from consultation to extensive participation and the third dimension focuses on the evaluation process itself.

Weiss (2004, p153) adds a political dimension to the debate, stating that programme evaluation is political in three different senses. Firstly, programmes are brought into being through a political process. Secondly, evaluation results feed decision-making and compete with other perspectives in the political process. Thirdly, evaluation is inherently political in its nature because of the conclusions it reaches. Cronbach (1980, p3) argues that "a theory of evaluation must be as much a theory of political interaction as it is a theory of how to determine the facts". Patton (1997, p347) maintains that "the fact that evaluation requires classifying and categorizing makes it political". Kim and Cervero (2007, pp7-9), in a study of a management development leadership course in a Korean insurance company found that the evaluation process was shaped by structurally asymmetrical power relationships within the organisation. They state "given the political nature of evaluation, the role

of evaluators is likely to be entangled in power struggles among stakeholders". Specifically, four key themes emerged. Firstly, organisational demands in evaluation reproduce power relations of the planning stage. Secondly, HRD practitioners function as gatekeepers for evaluation input. Thirdly, the HRD manager uses his position to advocate a dominant paradigm in HRM. Fourthly, HRD practitioners privilege learners' reactions in the evaluation. A further contribution to the debate is provided by Holton and Naquin (2005, p265) who provide a critical analysis of HRD evaluation models from a decision-making perspective. They provide a critique of the rational-economic framework that underlies many evaluation models and suggest that these do not work in practice for making decisions. Holton and Naquin argue that bounded-rationality models are of more value, stating that "decision makers have neither the time nor resources to conduct complex ROI-type evaluations". Naturalistic evaluation models are also of more value, involving collaborative, participatory and learning orientated approaches. Evaluations that work most effectively for decision making involve multiple stakeholder groups.

### **3.7. A Summary on Evaluation**

Whilst the literature on stakeholder perspectives and political dimensions has received some treatment within the evaluation debate as outlined above, much more academic research in this area is required. Indeed Michalski and Cousins (2001, p38) state "given the large and growing body of training literature and the number of resources devoted to corporate training and its evaluation, we find the underdevelopment of work on stakeholder diversity in the field to be striking". In the years since this statement was made, the paucity of literature on stakeholder/political dimensions and the lack of organisational research in this area, demonstrates that this observation is still correct. What is even more striking is the fact that no attempts have been made within the evaluation literature to evaluate expectations and perceptions of service quality for different stakeholder groups. It would appear that there has been such an obsession with seeking the holy grail of return on investment (ROI), that the 'softer' perspective of measuring the expectations

of different stakeholder groups has been largely ignored or forgotten. A detailed search of academic databases on evaluation, conducted for the purposes of this research, has revealed no studies of this kind and this appears to be a clear gap within the evaluation literature.

In conclusion, this research study shares the scepticism and cynicism felt by many academic writers relating to traditional models of evaluation with their emphasis on outcomes and return on investment. Such approaches do appear to be a search for the holy grail and like the legend itself this holy grail may never be found. This research study proposes a new approach to the study of evaluation, which will make a contribution to the stakeholder literature on evaluation. The relatively limited literature in this area so far has focused, as outlined above, on types of stakeholder the interests of stakeholders and which stakeholder has control over the evaluation process. Other studies have focused on political dimensions, including power struggles between stakeholders and the need for a more collaborative approach. This research study makes a contribution to this literature by examining stakeholder perspectives through a different lens, namely the study of expectations and perceptions of service quality. It is to this body of literature that we now turn.

### **3.8. Service Quality**

Quality has been described as “units of goodness packed into a product or service” (Ghobadian et al, 1994, p44). It is important to distinguish services from products. Abdullah (2006a, p571) emphasises that the word ‘service’ has a richness and diversity of meaning. The unique characteristics of a service are intangibility, inseparability, perishability and heterogeneity. Services are intangible in that they cannot be touched. As Brochado (2009, p175) states: “Services are behavioural rather than physical entities, and have been described as deeds, acts or performances”. Services are also inseparable in that they involve simultaneous production and consumption; heterogeneous (or variable) in that they depend on the mood of a customer at a particular time; and perishable, in that they cannot easily be stored or warehoused.

Service quality is an elusive concept and there is a considerable amount of debate about the nature of this phenomenon (Abdullah, 2006a, p571). Pariseau and McDaniel (1997, p206) argue that the concept of service quality has gradually evolved from “quality is excellence, to quality is value, to quality is conformance to specifications, to most recently, quality is meeting and/or exceeding customer expectations”. Sahney, Banwet and Karunes (2004, p147) posit a further five perspectives on quality. The first is quality as ‘exceptional’ which includes being distinctive, exceeding high standards and passing required standards. The second is quality as “consistency” achieved through zero defects and a quality culture. The third is quality as “the purpose of the product/service”, which includes fitting customer specifications, mission-based fitness for purpose and customer satisfaction. The fourth is quality as “value for money through efficiency and effectiveness”, linked to accountability and performance indicators. The fifth is quality as “transformative” in terms of a qualitative change or form.

### **3.9. Expectations and Perceptions**

A central concept within service quality studies is the notion of expectations and perceptions. Parasaruman et al (1985, p42) argued that “service quality is a measure of how well the service level delivered, matches customer expectations”. They also proposed that service quality perceptions result from a comparison of consumer expectations with actual service performance.

Expectations are pre-trial beliefs about a product or service and its future performance. Customers develop expectations on the basis of many sources of information including prior exposure to the service, word of mouth, expert opinion, publicity and company communications (Boulding, 1993, p9). Expectations can fall into four categories: forecast, normative, ideal and minimum tolerable. Forecast expectations are sometimes known as expected expectations or as predictive expectations. They refer to what the customer believes ‘will’ occur in the next service encounter. Normative expectations are also referred to as deserved expectations or as desired expectations. They refer to what the customer ‘should’ expect i.e. what is realistic and feasible for



the service provider to offer. Ideal expectations refer to the 'highest level' of service achievable by a service provider. Finally, minimum tolerable are often termed adequate expectations and refer to a "minimum acceptable baseline of performance" (Higgs et al, 2005, p30). The evidence suggests that customers utilise multiple levels of expectations. Perceptions are understood to be post-trial beliefs about the actual service received. Teas refers to perceptions as "consumer's beliefs about the service received" or as "experienced service" (Teas, 1993, p18).

The notion of expectations and perceptions in the assessment of service quality is based on the disconfirmation model originated by Oliver (Oliver, 1980, p465). This model suggests that a customer's level of satisfaction with a particular product or service is determined by disconfirmation. Disconfirmation is understood as the extent to which actual performance meets, exceeds or falls short of expectations. Confirmation results when expectations and performance match. Disconfirmation occurs when expectations and performance do not match. Disconfirmation can be of two types. Positive confirmation results from a mismatch of low expectations and high performance, whereas negative disconfirmation results from a mismatch of high expectations and low performance (Spreng and Dröge, 2001, p262).

### **3.10. Service Quality Models**

A range of quality models developed for industry have been tested or adopted within the Higher Education sector. According to Becket and Brookes (2008, p44) these include: Total Quality Management (TQM), the EFQM excellence model, the Balanced Scorecard, the Malcolm Baldrige Award, ISO 9000 Series, Business Process Re-engineering and SERVQUAL. Of these approaches, SERVQUAL and its derivatives have been most widely used in research studies for exploring the importance of expectations and perceptions.

### 3.10.1. SERVQUAL

SERVQUAL was developed by Parasuraman, Zeithaml and Berry (1985). Parasuraman et al. created the SERVQUAL instrument to measure service quality across a range of businesses, initially focusing on a bank, a telephone company, an appliance repair and maintenance firm and a credit card company (Parasuraman et. al., 1988, p22). SERVQUAL was based on the disconfirmation paradigm, which recognises the disparity between customers' initial expectations and their actual perceptions of quality (Angell et al., 2008, p237). Perceived quality is summarised as the consumer's judgement about an entity's overall excellence or superiority. SERVQUAL provided a "technology for measuring and managing service quality" (Buttle, 1996, p8). It was a construct for determining the gap between expectations and perceptions. Parasuraman et al. (1985, p5) recognised five gaps in the SERVQUAL concept, as follows:

GAP	DEFINITION
GAP 1	The gap between what customers expect and what managers think they expect. This gap may arise from the lack of marketing research on customer needs or inadequate communication within the organisation between front-line staff and senior management
GAP 2	The gap between what customers expect and what managers think they expect. This gap may arise from the lack of marketing research on customer needs or inadequate communication within the organisation between front-line staff and senior management
GAP 3	The gap between service specifications and service delivery. This gap may arise from role ambiguity and role conflict within the organisation. Further factors may be poor employee job-fit, poor job definition, poor technology job-fit, inappropriate supervisory control systems, lack of empowerment and lack of teamwork
GAP 4	The gap between service delivery and external communication to customers. This gap may arise from inadequate horizontal communication (with intermediaries) and a propensity to over-promise by the organisation
GAP 5	The gap between customer expectations and their perceptions of the service delivered. This gap may arise from influences exerted on the customer side and on the gaps on the part of the service provider.

Table 6: SERVQUAL Quality Gaps (Parasaruman et al., 1985)

The first four gaps are identified as functions of the way in which the service is delivered and, as such, focus on the role of the provider, whereas gap five

relates to the customer and, as such, is considered to be the true measure of service quality. SERVQUAL is based on gap five.

Elaborating on the key issue in gap five, Parasuraman et al. (1988, p16) state: “service quality, as perceived by consumers, stems from a comparison of what they feel service firms should offer (i.e., from their expectations) with their perceptions of the performance of firms providing the services”. Buttle (1996, p9) emphasises that the gap being measured here is between customer expectations of a class of service providers and their perceptions of the performance of a particular service provider. Initial research in 1985 revealed that the criteria used by consumers in assessing service quality consisted of ten dimensions. These dimensions included tangibles, reliability, responsiveness, communication, credibility, security, competence, courtesy, understanding/knowing the customer and access (Parasuraman et al., 1985, p47). These ten dimensions were reduced in a further study in 1988 to five dimensions, as follows:

DIMENSION	DEFINITION
TANGIBLES	Physical facilities, equipment and appearance of personnel
RELIABILITY	Ability to perform the promised service dependably and accurately
RESPONSIVENESS	Willingness to help customers and provide prompt service
ASSURANCE	Knowledge and courtesy of employees and their ability to inspire trust and confidence
EMPATHY	Caring, individualised attention the firm provides its customers

Table 7: SERVQUAL Quality Dimensions (Parasaruman et al., 1988)

The last two dimensions (assurance and empathy) contained items representing the seven original dimensions of communication, credibility, security, competence, courtesy, understanding/knowing customers and access. The revised scale included twenty-two parallel expectation and perception statements, distributed over the five factors and asked respondents to answer the statements based on a five-point Likert scale (Parasuraman et al., 1988, p23). In 1991, Parasuraman et al. presented a follow-up study which refined and reassessed the SERVQUAL model. One of

the key changes related to wording. The original scale was based on normative expectations and focused on “should” terminology, which tended to lead to unrealistically high expectation scores. Parasuraman et al. (1991, p422) changed the wording to what customers “would” expect from companies delivering excellent customer service. Hence, “telephone companies should keep their records accurately” was changed to “excellent telephone companies will insist on error-free records”. The wording of many perception items were also changed in similar fashion. Two new statements relating to tangibles and assurance were also substituted for original items.

### **3.10.2. Criticisms of SERVQUAL**

A variety of academic writers have subjected SERVQUAL to criticisms from different perspectives. One of the early critiques has been presented by Cronin and Taylor (1992, pp55-64) who argue that SERVQUAL is flawed because of its adoption of the disconfirmation paradigm. They state that “the current conceptualization and operationalization of service quality (SERVQUAL) is inadequate. They continue, “little, if any, theoretical or empirical evidence supports the relevance of the expectations-performance gap as the basis for measuring service quality”. A number of further concerns relating to SERVQUAL have been raised by other academic writers. Andersson (1992, p42) argues that SERVQUAL does not draw on previous social science research, especially economic theory, statistics and psychological theory. Specifically, Andersson argues that SERVQUAL takes no account of the costs of improving service quality; it makes use of Likert scales but performs analyses with methods suited to interval level data; it does not allow enough possibilities to play with statistical data; and it fails to make use of the literature on the psychology of perception. A further set of criticisms of SERVQUAL relate to the use of the gap measurement approach. Babakus and Boller (1992, p254) argue that the “difference scores do not provide any additional information beyond that already contained in the perceptions component of the SERVQUAL scale”. The perceptions score is dominant because respondents tend to rate expectations high. Iacobucci et al. (1994, p2) add “while conceptually difference scores might be sensible, they

are problematic in that they are notoriously unreliable, even when the measures from which the difference scores are derived are themselves highly reliable. They also argue that expectations might not exist or be formed clearly enough to serve as a standard for evaluation of a service experience. They may be formed simultaneously with service consumption (Iacobucci et. al., 1994, p11). Teas (1994, p132) has also explored the issue of gaps. Where gaps are tied with similar differences, he raises the question as to whether these really mean equal perceived service quality. A further point is considered by Buttle (1996, p14) who suggests that SERVQUAL fails to take into account the dynamics of changing expectations. Whilst the suggestion in Parasuraman et. al's work is that expectations rise over time, it is also possible that they may fall over time. Buttle (1996, p14) also suggests that SERVQUAL has an inbuilt assumption that positive and negative disconfirmation are symmetrically valent, whereas in reality failure to meet expectations may be more revealing than meeting or exceeding expectations.

SERVQUAL has also been criticised for focusing on process rather than outcomes when it comes to service quality. Swartz and Brown (1989, p190) drew a distinction between 'what' the service delivers, which is evaluated after delivery, and 'how' the service is delivered which is evaluated during delivery. The 'what' dimension is defined as outcome delivery by Parasuraman et al (1985), technical quality by Grönoos (1983) and physical quality by Lehtinen and Lehtinen (1982). The 'how' dimension is defined as process quality by Parasuraman et al (1985), functional quality by Grönoos (1983) and interactive quality by Lehtinen and Lehtinen (1982). Further light is shed on the notion of the 'how' dimension by Jobber (2004, p5) who argues that the service process consists of three distinct phases, namely pre-purchase, consumption and post-consumption. The pre-purchase phase involves information gathering from friends or from advertising and websites. The consumption phase involves actual interaction with the service and some preliminary judgements about the ongoing service quality. The post-purchase phase involves the customer making ultimate judgements about all aspects of the service. Critics have argued that Parasuraman et. al's approach to service quality focuses on process quality rather than outcome quality (Buttle, 1996,

p14). Richard and Allaway (1993, p60), in a study of Domino's Pizza, responded to this issue by developing a revised SERVQUAL model which includes both process and outcome components. They concluded that the process and outcome approach is a better predictor of consumer choice than process or outcome alone. Critics have also raised questions concerning the number of dimensions within the SERVQUAL scale. Parasaruman et. al. (1988, p30) argue that SERVQUAL "provides a basic skeleton through its expectations/perceptions format encompassing statements for each of the five service quality dimensions. The skeleton, when necessary, can be adapted or supplemented to fit the characteristics or specific research needs of a particular organisation". Subsequently, researchers have explored the use of a varying number of dimensions. Carman (1990, p33) used nine dimensions in a study of hospital research, which included admission service, tangible accommodations, tangible food, tangible privacy, nursing care, explanation of treatment, access and courtesy afforded visitors, discharge planning and patient accounting. In contrast, Bouman and van der Wiele (1992, p5) used only three dimensions in their study on car servicing, namely, customer kindness, tangibles and faith. Researchers have also found that the number of items within each dimension may need to be varied to capture the variance or context specific meaning of each dimension. Carman's hospital study involved 40 items whereas Bouman and van der Wiele used 48 items within their research. Babakus and Boller (1992, p255) suggest "the domain of service quality may be factorially complex in some industries and very simple and unidimensional in others".

Further criticisms of SERVQUAL relate to the understanding of expectations within the scale. Teas (1993, p35) recognised that respondents' interpretation of the expectations scales may vary according to six different interpretations. The first is service attribute importance: customers may respond by rating expectation statements according to their relative importance. The second is forecasted performance: customers may respond by using the scale to predict the performance they expect. The third is ideal performance: the optimal performance expected. The fourth is deserved performance: the level of performance that customers feel the performance should be. The fifth is

equitable performance: the performance level that customers feel they should receive given a perceived set of costs. The sixth is minimum tolerable performance what performance must be. The difference in respondents' interpretations helps to explain a considerable percentage of the variance in SERVQUAL expectations. Parasaruman et al. (1994, p118) have responded to this criticism by redefining and clarifying expectations as the service customers would expect from excellent service organisations rather than normative expectations of service providers. Another criticism of SERVQUAL relates to the relative nature of its customer evaluations and the subsequent failure to determine absolute standards of service quality. Respondents are asked to report their expectations of excellent service within a class (Iacobucci et al., 1994, p21). On this basis an E-score of six for Joe's Greasy Spoon is equivalent to an E-score of six for Michel Roux's Le Lapin restaurant, which clearly in absolute terms cannot be the case (Buttle, 1996, p21). A further concern relating to SERVQUAL relates to the fact that thirteen statements are worded positively and nine pairs are worded negatively. Parasaruman et al. (1988, p17) deliberately introduced this approach as good practice to reduce systematic response bias. However, Babakus and Boller (1992, p254) concluded that the item wording produces a 'method factor' The wording may create factors that are method artifacts rather than meaningful dimensions of service quality. Parasaruman et al. (1991, p423) have responded to this criticism by rewording all negatively-worded items positively. The use of seven-point Likert scales has also received criticism, on the grounds of a lack of labelling of points two and six which may lead to overuse of the extreme ends of the scale. A further problematic issue is the meaning of the midpoint scale which could refer to 'don't know', 'do not feel strongly' or 'do not understand' (Buttle, 1996, p22). Finally, Bouman and van der Vliek (1992, p7) comment that respondents are often bored or confused by two administrations of the questionnaire for both expectations and perceptions. Carmen (1990, p35) agrees and criticises Parasaruman et. al. for asking participants to complete the two questionnaires at a single sitting after the service experience. Clow and Vorhies (1993, p22) argue that expectations should be measured prior to receipt of services, otherwise responses will be biased.

A considerable amount of discussion has taken place within the literature relating to the reliability and validity of the SERVQUAL construct. A reliable measure is one that is consistent. If the quality does not change, the measure of quality will not change. A valid measure is one in which the score created by the measurement process reflects the true value of the property that is being measured (Asubonteng et al., 1996, p63). The Cronbach alpha reliability coefficient has been used in many SERVQUAL studies to demonstrate reliability. In the Parasuraman et al. study (1988), once the SERVQUAL scale had been revised to 22 items, the alpha coefficient scores demonstrated high reliability with scores ranging between 0.87 for a Bank and 0.90 for a repair and maintenance company. These high scores were confirmed by further studies. In an early meta-analysis across a range of studies (including Babakus and Boller, 1992; Babakus and Mangold, 1992; Bowers et al., 1994); Carman, 1990; Cronin and Taylor, 1992; Finn and Lamb, 1991; Headley and Miller, 1993; Lytle and Mokwa, 1992; McAlexander et al., 1994; O'Connor et al., 1994; Taylor and Cronin, 1994), it was found that the SERVQUAL scale was internally reliable (Abubonteng et al., 1996, p66). The lowest score was 0.59 (Finn and Lamb, 1991), but other scores ranged up to 0.97 (Babakus and Mangold, 1992, p24).

Several forms of validity have been discussed within the literature. The two main forms are content (or face) validity and construct validity. Construct validity itself is a composite of convergent validity, discriminant validity and concurrent validity. Content validity focuses on whether the scale is meaningful and measures what it is supposed to measure i.e. whether the scale items capture the main aspects of the instrument being measured. Parasuraman et al. (1988, p28) made clear efforts to refine and purify their scale and claimed that the SERVQUAL scale "can be considered to possess content validity". Since then further studies, whilst making refinements of wording to the SERVQUAL scale, have confirmed that it does have content validity (Asubonteng et al., 1996, p74). Often content validity involves a qualitative approach and is confirmed through discussions with customers and interviews with company executives (Babakus and Boller, 1992, p32). Convergent validity measures the extent to which the various scale items



'converge' or correlate with other measures of the same construct. The reliability of a scale, as measured by the coefficient alphas, demonstrates the degree of cohesiveness among scale items and is therefore an indirect indicator of convergent validity. A stronger test of convergent validity is factor analysis. Parasuraman et al. (1988, p30) examined the relationship between a service firm's overall quality (referred to as "Overall Q") and individual SERVQUAL scores and concluded "the strength and persistence of the linkage between the Overall Q categories and the SERVQUAL scores across four independent samples offer strong support for SERVQUAL's convergent validity". However, in their meta-analysis, Asubonteng et al. (1996, p74) found that no other studies demonstrated the same factor loadings and concluded "there is little proof of SERVQUAL's convergent validity". Discriminant validity is the extent to which a measure does not correlate with other measures from which it is supposed to differ. Most studies have indicated that overlap does exist between the SERVQUAL dimensions, especially between responsiveness, assurance and empathy (Asubonteng et al., 1996, p67). Concurrent validity relates to the extent to which SERVQUAL scores are associated with conceptually related measures. Concurrent validity has been examined in several studies, including Babakus and Boller (1992) and Bresinger and Lambert (1990). SERVQUAL performs well in terms of concurrent validity (Asubonteng et al., 1996, p74).

### **3.10.3. SERVPERF**

In contrast to SERVQUAL, Cronin and Taylor (1992, p58) present an alternative performance-only instrument for measuring service quality, namely SERVPERF. SERVPERF is a variant of the SERVQUAL scale and based on the 22 items of the perception component alone (Brochado, 2009, p176). SERVPERF only uses the perceptions data because it assumes that participants provide their ratings by automatically comparing performance perceptions with performance expectations. Therefore measuring expectations is unnecessary (Carrillat, Jaramillo and Mulki, 2007, p475). Cronin and Taylor (1992, p64) argue that the SERVPERF scale explains more of the variation in service quality than SERVQUAL. In reply Parasuraman et

al. (1994, p112) have presented a strong defence of their position arguing that critics seem “to discount prior conceptual work in the SQ literature” and that Cronin and Taylor’s study “does not justify their claim” that the disconfirmation paradigm is flawed. In a further contribution to this debate Cronin and Taylor (1994, p130) have created a further defence stating that the objections of Parasaruman et. al. relate more to issues of interpretation than issues of substance and that the existing literature definitely does support the performance-only perspective. Since this debate, a considerable amount of discussion has taken place in the literature over which measurement instrument is superior. Carillat, Jaramillo and Mulki (2007, p485), in a meta-analysis of seventeen years of research over five continents conclude that both scales are adequate and equal predictors of service quality. However, other researchers within the service quality domain have concurred with Cronin and Taylor that the performance-only approach is a more suitable approach. For example, a team of researchers, including Zeithaml herself, has rejected the concept of an expectations-based paradigm and agree that service quality is influenced only by perceptions (Boulding et al., 1993, p9). Firdaus (2006a, p32) has also confirmed that SERVPERF (performance-only) results in more reliable estimations, greater convergent and discriminant validity, greater explained variance and consequently less bias than the SERVQUAL scale”.

Variants of both the SERVQUAL and SERVPERF scales have recognised that students will use different criteria in making their evaluation, which is likely to vary in terms of importance. Importance is defined as “a reflection by consumers of the relative value of the various qualities attributes” (O’Neil and Palmer, 2004, p43). This involves gathering information on the level of importance students place on each dimension. This has led to weighted SERVQUAL and weighted SERVPERF scales which take into account the relative importance of the five dimensions to the customer and creates a composite weighted score of the perceived service quality for each dimension (Brochado, 2009, p177).

### **3.10.4. HEdPERF**

Firdaus (2006b, p572) argues that service quality instruments such as SERVQUAL and SERVPERF were designed as generic instruments of service quality which would have applicability across a wide range of industries. This was partly due to the fact that the scale development process of both instruments was derived from samples from multiple industries (Carrillat, Jaramillo and Mulki, 2007, p476). It should be noted that Parasaruman et. al. (1988, p30) originally agreed with the point that SERVQUAL was designed as a basic skeleton and would need adaptation to specific industry contexts. Firdaus (2006b, p572) goes further by arguing that “perhaps the time has come to ‘bury’ the existing instruments and attempt to reconstruct or redefine service quality from a new perspective”. This has led to the creation of new instrument, HEdPERF, which is specifically designed for the higher education sector. Firdaus (2006b, p571) originally developed a scale of 41 items which was designed to measure student perceptions of service quality. He recognised that the definition of ‘customer’ is a complex issue within higher education and can comprise a variety of groups including students, employers, academic staff, government and families, but chose to focus his research study on what he considered to be the primary customer ‘students’. The approach Firdaus took to the research followed a number of key stages. Stage one involved the identification of critical factors or determinants of service quality by means of a literature review and a series of focus groups. Stage two involved the development of the research instrument and its piloting through the use of a draft questionnaire, a pilot test, expert validation and finally, the modification, refinement and finalisation of the scale. Stage three involved the main survey itself, which consisted of a scale consisting of 13 items adapted from SERVPERF and 28 new items (p78). The items were categorised into six distinct dimensions, namely non-academic aspects, academic aspects, reputation, access, programme issues and understanding. Firdaus (2006c, p569) recognised that the scale should incorporate not only the academic components, but also aspects of the total service environment as experienced by the student.

DIMENSION	DEFINITION
NON-ACADEMIC ASPECTS	Duties carried out by non-academic staff that are essential to help students fulfil their study obligations, such as respect, equality of treatment, confidentiality, good communication.
ACADEMIC ASPECTS	Responsibilities carried out by academic staff, such as positive attitudes, regular feedback to students, a good reputation as an institution, degrees which are recognised internationally, educated and experienced academic staff
REPUTATION	The importance of educational institutions projecting a professional image
ACCESS	Issues such as approachability, ease of contact, availability and convenience
PROGRAMME ISSUES	Wide ranging and reputable programmes with flexible structure and syllabus
UNDERSTANDING	Understanding the specific needs of students

Table 8: HEdPERF Quality Dimensions (Firdaus, 2006c)

Stage four of the Firdaus research approach involved tests of unidimensionality (using chi-square, adjusted-goodness-of-fit index and root mean square error of approximation), reliability (using Cronbach Alpha), validity (convergent, discriminant and criterion-related) and comparative regression analysis (effect size and relative influence). Stage five involved the creation of the modified and finalised HEdPERF measurement scale (Firdaus, 2006b, p76). The findings suggested that “the modified HEdPERF scale is better suited in higher education settings” (Firdaus, 2006a, p45). Brochado compared five different measurement scales (including SERVQUAL, weighted SERVQUAL, SERVPERF, weighted SERVPERF and HEdPERF) based on a study of Higher Education within Portugal. Her conclusion was that all five scales present good results in terms of measurement capabilities. She concludes that SERVPERF and HEdPERF demonstrate the best measurement capability, but it is not possible to determine which one is the best (Brochado, 2009, p185).

### **3.10.5. Benefits of Service Quality Models**

SERVQUAL and its derivative models have survived much criticism over the years and are still seen by many as tried and tested tools in the assessment of service quality. Buttle (1996, p10), comments “without question, SERVQUAL has been widely applied and is highly valued”. Nyeck et al. (2002, p101) concur, stating that the SERVQUAL measuring tool “remains the most complete attempt to conceptualize and measure service quality”. Several benefits of service quality and SERVQUAL in particular have been proposed. High levels of service quality can create the potential to gain higher market share, improved profitability and the opportunity to gain competitive price premiums (Angell et al, 2008, p238). Buttle (1996, p8) highlights a number of benefits of service quality, including costs, profitability, customer satisfaction, customer retention and positive word of mouth.

### **3.11. Service Quality in Higher Education Settings**

Service quality models have been used extensively in a wide variety of industry and service sectors. However, one of the most noteworthy contexts for study has been the realm of higher education. The specific context of the higher education sector is different to other service sectors in some regards. As Dickson et al. (1995, p63) have observed “Education may be unique in the sense that it is difficult for the customer to assess the service quality and relevance of the service. A university course is unusual in that the buyer i.e. the student, may have only a general idea of what lies ahead and may not fully comprehend the context or relevance of a course until the later years of study or potentially years after graduation”.

Despite this potential difficulty, a number of attempts were made to apply the principles of service quality to the Higher Education sector, in the early years following the development of SERVQUAL. Cuthbert (1996, p34) developed a modified version of the SERVQUAL instrument. The SERVQUAL questions were adapted in a minimalistic fashion to be made relevant to the HE sector and the survey was undertaken with students from three undergraduate

degrees. Following some disappointing results, Cuthbert concluded that SERVQUAL may not be an appropriate tool for measuring service quality in higher education. In a study within the Australian Higher Education scene, Soutar and McNeil (1996, p81) came to a more positive conclusion arguing that the SERVQUAL dimensions are applicable in a university context and that modification of the original instrument to include industry-specific quality features is appropriate. In the following year a further study within Australia by Athiyaman (1997, p532) examined service quality in a medium-sized university. Students were surveyed at both pre and post enrolment stages in relation to eight services and service attributes including standard of teaching, availability of staff, library services, computing facilities, recreational facilities, class sizes, subject content and student workload. The results demonstrated that perceived quality is a consequence of customer satisfaction and that pre-enrolment attitude has little effect on post-enrolment attitudes. Pariseau and McDaniel (1997, p213) investigated service quality within two small private business schools in north-eastern USA. The SERVQUAL instrument was used for the purpose with few modifications other than a question which asked students for their overall view of service quality and some questions about retention and student loyalty. The results demonstrated that business faculty were not meeting student expectations. They also found that in the higher education sector, assurance, reliability and empathy were deemed as most important as determinants of quality among students, whereas Parasuraman et al. had found that reliability was the most important. Pariseau and McDaniel concluded that SERVQUAL was a useful initial attempt to measure service quality in their two institutions and research on a wider number of Higher Education institutions was necessary for the future. LeBlanc and Nguyen (1997, p76) also developed a modified SERVQUAL instrument containing 38 items, which was tested on a small business school in Canada. The results demonstrated that the main determinant of service quality was reputation i.e. the institution's ability to position itself in the minds of students as innovative, involved with the business community and having the students' needs at heart. Further important factors were the role of faculty and administrative personnel, curriculum, and access to facilities. In a later study LeBlanc and Nguyen (1999, p194) engaged in a further study of a small

business school in Canada. This study found a relationship between students' evaluation of service quality and perceptions of price. Higher Education institutions should seek to offer quality services within an acceptable price range. The results also indicated the importance of functional value i.e. opportunities for employment and career progression. In 2004 Sohail and Shaikh (2004, p64) created a modified version of the LeBlanc and Nguyen instrument in a study of a large university in Saudi Arabia. They found that 'contact personnel' was the most important influencing factor in student perspectives on service quality, followed by 'physical evidence' and 'reputation'. Within the UK, a study at Edgehill University College by Aldridge and Rowley (1998, p1) followed a perception only approach and did not seek to collect any data in relation to expectations. They also chose to take a longitudinal approach over several years. Two noteworthy features of their approach proved interesting, namely, the use of the student charter as a basis for service quality criteria and the use of electronic questionnaires accessible from an intranet. However, the use of electronic response forms yielded disappointing returns on more than one occasion and made statistical analysis inappropriate.

Since the 1990's, studies on service quality within higher education have been conducted in a wide variety of universities worldwide. UK universities have featured in a number of these studies. Oldfield and Baron (2000, p93) investigated service quality at a UK Business and Management Faculty at a UK university, using an electronic approach. Based on the SERVPERF instrument, the survey targeted both first year and final year undergraduate students, using computer aided data capture (CADC), whereby respondents keyed in their responses via a radio-controlled handset. The study found that students have three main criteria that need to be satisfied, namely requisite (essential), acceptable (desirable) and functional (practical or utilitarian) aspects. The functional aspects are often more neglected and include those areas that lie outside the course team's control such as out-of-date IT equipment or lack of availability of facilities at weekends. A further study by Douglas et al. (2006, p258) of undergraduate satisfaction levels at John Moore's University, based on their own survey questionnaire on service

quality, found that the core services of learning and teaching were deemed as the most important factors. IT facilities were also rated as of high importance. Some differences between full-time and part-time students' perceptions were also noted. Telford and Masson (2005, p116) also conducted research within a UK university, but chose to examine the congruence between views of service quality taken from a range of stakeholders including students, academic staff and the university senior management. This study, although taking into account the SERVQUAL instrument, was primarily qualitative, comprising interviews, focus groups and questionnaires. Based on this research Telford and Masson developed a framework of issues, ranked in order of importance, that were deemed as important by the various stakeholder groups. Whilst there were some differences between stakeholder perspectives, on the whole a clear degree of congruence was found. Smith et al. (2007, p344) also examined both student and staff perceptions in their study of service quality within an IT department at a UK university. The research utilised the SERVQUAL instrument and found that in general terms the perceptions of students and staff were similar, although there were some specific differences in relation to Tangibles, Assurance and Empathy.

Service quality research has also been conducted within wider Europe. Brochado (2009, p185) investigated five alternative instruments for measuring service quality, within a Portuguese university in Lisbon. The five instruments included SERVQUAL, SERVPERF, Weighted SERVQUAL, Weighted SERVPERF and HEdPERF. All five instruments provided good results in terms of measurement capabilities, but the study concluded that SERVPERF and HEdPERF are the best instruments overall. Gallifa and Batallé (2010, p168) undertook a study of final-year undergraduate student perceptions of service quality at a university in Barcelona, Spain, using an adapted version of the SERVPERF instrument. The results indicated different perceptions of service quality at a variety of university campuses, enabling university management to detect deficiencies in quality at each location. Kleijnen et al. (2011, p148) also focused on a variety of different campuses in a study of service quality within the Netherlands. Targeting academic staff, they developed their own questionnaire, based on an extensive literature review.



The results indicated that academic staff members were neutral about the degree to which quality management activities were conducted within their departments and that quality management varied greatly between departments. Dado et al. (2011, p40) used a modified version of SERVQUAL to investigate service perceptions and expectations of service quality in an Engineering Department within a Slovakian university. The findings indicated that the students' perceptions of service quality fell short of student expectations across all service dimensions.

From a US perspective, O'Neill (2003, p320) focused on a specific issue in the measurement of service quality, namely the influence of time. He argued that most studies on service quality are cross-sectional in nature and do not take account of tracking student perceptions over time. Based on a study which employed the SERVQUAL instrument, the results suggested that a more longitudinal approach is required and that perceptions of service quality decline with the passage of time. LaBay and Comm (2003, p316) extended the discussion of service quality to distance learning courses. In a study of undergraduate students within a US Business College, they created their own instrument and employed a pre-test/post-test approach with gap analysis on both taught and online delivery. The results indicated that student expectations of both forms of delivery were similar. However, student perceptions of online delivery were much better than those of taught delivery. Another US study by Joseph et al. (2005, p76) chose to use importance-performance analysis (the I-P grid), rather than SERVQUAL, due to its perceived simplicity as an instrument. The study focused on university freshmen and the results indicated that male and female students ranked service quality issues differently in order of importance.

South-East Asia has also been a focus for service quality within the Higher Education sector. Sahney et al. (2003, p307), writing from an Indian perspective chose to focus on an industry perspective of service quality in educational institutions. Through use of the SERVQUAL instrument they surveyed HR experts who visited the campuses in relation to student placements. Based on a small sample of only 32 respondents, they found that

there was a great deal of dissatisfaction with the educational system. This included disappointment with both the performance of the institutions themselves and with the students who graduated from them. They also pointed out that organisations, as well as students, are important customers of the services being delivered. In a later study Sahney et al. (2008, p502) investigated faculty perspectives of service quality. Using SERVQUAL once again they determined a number of quality requirements, which if adopted and implemented, could lead to increased satisfaction of the faculty. Whilst many of the studies of service quality within higher education have focused on undergraduate students, Banwet and Datta (2003, p241) focused on postgraduate perspectives from an institute in New Delhi. Through employment of the SERVQUAL instrument they found that the lectures were generally up to the expectations of the students. However, students were not satisfied with the condition of the classrooms or the visual presentations made during lectures. Lecture outcomes had the strongest effect on perceived lecture quality. Tan and Kek (2004, p23) conducted a study of service quality in two universities in Singapore, using an adapted version of the SERVQUAL instrument. Through the use of an electronic approach to survey returns, they found that their modified version of SERVQUAL adapted for the Singapore context was a useful instrument for determining service quality. In Taiwan, Chen et. al. (2006, p496) utilised the importance-satisfaction model (IS) to investigate service quality within a private university. This study focused on higher education teachers, rather than students and provided a range of quality attributes that were deemed as either excellent, to be improved, surplus to requirements or careless. In a study of Japanese university full-time students, Sultan and Wong (2009, p139) utilised an adapted version of HEdPERF to examine perceptions of service quality. This resulted in a new model (PHEd) comprising eight dimensions and 67 items which the authors claim can be used in a wide range of higher education institutions. Kong and Muthusamy (2011, p150) completed a study in Malaysia using a questionnaire based on the Grönroos' Perceived Service Quality model, arguing that this model includes the image of the service provider as well as functional and technical quality and also considers students as partners, rather than just consumers, in education. In a further study in Malaysia, Shekarchizadeh et al.

(2011, p77) used a modified SERVQUAL instrument to investigate the perceptions and expectations of service quality service quality of international postgraduate students. Five main factors were revealed, namely, professionalism, reliability, hospitality, tangibles and commitment. The results demonstrated that the expectations of students were not being met in the performance of education services. Reasons may include benchmarking Malaysian universities against Western universities, adjustment problems in making the transition to a new culture and lack of communal interaction with their hosts.

Australia has also been the location for a number of studies on service quality within higher education. Some of these studies have focused on administrative, rather than academic aspects of service within universities. Waugh (2002, p183), in a study of an Australian university, focused on academic staff perceptions of administrative contact within the university. Using an adapted version of SERVQUAL, he implemented a successful pilot study and recommended that the instrument should be used more widely within the Australian context. O'Neill and Palmer (2004, p50) also investigated administrative quality at a large university within Western Australia. Student perceptions of service quality were researched through use of an adapted SERVQUAL instrument and the results indicated that students attach different weightings to different aspects of the service encounter and that greater effort should be made to address those aspects which students deem most important (p50).

### **3.12. A Summary on Service Quality**

The literature reveals that a wide variety of research studies on service quality have been conducted within the higher education sector. However, it is also notable that clear gaps exist in this area. The first is that the service quality literature relating to the higher education sector has largely focused on open rather than corporate education programmes. The second is that the focus has largely been on one stakeholder group. In most cases the emphasis has been on students undertaking the programmes and in a few cases it has

focused on academic staff. In only one case, however, has there been a focus on multiple stakeholder groups, but they are limited to groups within one higher education institution. Table 9 provides the details.

Author(s)	Programme Type	Stakeholder Group
Soutar and McNeil (1996)	Open	University students
Anderson and Zwelling (1996)	Open	University students
Cuthbert (1996)	Open	University students
Pariseau and McDaniel (1997)	Open	University students
LeBlanc and Nguyen (1997)	Open	University students
Aldridge and Rowley (1998)	Open	University students
Oldfield and Baron (2000)	Open	University students
Waugh (2002)	Open	University students
O'Neil (2003)	Open	University students
Banwet and Datta (2003)	Open	University students
Sahney, Banwet and Karunes (2003)	Open	HR Experts
LaBay and Comm (2003)	Open	University students
Tan and Kek (2004)	Open	University students
Sahney, Banwet and Karunes (2004)	Open	University students
Sohail and Shaikh (2004)	Open	University students
O'Neil and Palmer (2004)	Open	University students
Telford and Masson (2005)	Open	University students, academic staff, senior university staff
Chen et al. (2006)	Open	Academic staff
Firdaus (2006)	Open	University students
Smith et al. (2007)	Open	Students, Academic staff
Sahney, Banwet and Karunes (2008)	Open	University students
Yeo (2008)	Open	University students
Brochado (2009)	Open	University students
Gallifa and Batallé (2010)	Open	University students
Dado et al. (2011)	Open	University students
Kleijnen et al. (2011)		Academic staff
Shekarchizadeh et al. (2011)	Open	University students
Kong and Muthuasamy (2011)	Open	University students

Table 9: Service Quality Studies 1996-2011

This survey of service quality studies within the higher education context reveals that corporate education programmes with their 'closed' nature and distinctive characteristics have not been a focus of study within the service quality literature. A clear gap exists for a study of expectations and perceptions of service quality within corporate education.

### **3.13. A Service Quality Model for Corporate Education**

In the exploration of this study it is important to articulate the model upon which the research will be built. The first question to be addressed is whether the research will utilise a SERVQUAL-informed, SERVPERF-informed or HEdPERF-informed approach. The choice made for this research study is a SERVQUAL-informed approach. The reasoning for this choice is as follows. Firstly, one of the research questions for this study is this, “Is the notion of ‘return on expectations’ a helpful concept?” The concept of a ‘return on expectations’ requires an assessment of both expectations and perceptions and a determination of the gap between the two. This will in turn determine whether there is a case of positive disconfirmation in which perceptions exceed expectations. Whilst the literature hints that a return on expectations may be unlikely since expectation scores for many service quality studies are generally high (Babakus and Boller, 1992, p254), this remains to be tested within the context of corporate education. Secondly, despite the criticisms of SERVQUAL it remains a tried and tested tool within the assessment of service quality (Buttle 1996, p10; Nyeck et al. 2002, p101). Thirdly, SERVQUAL (albeit in modified form) has a good track record as a useful model to utilise within a higher education setting, as evidenced by table 10.

Author(s)	Base Model
Soutar and McNeil (1996)	SERVQUAL
Anderson and Zwelling (1996)	SERVQUAL
Cuthbert (1996)	SERVQUAL
Pariseau and McDaniel (1997)	SERVQUAL
LeBlanc and Nguyen (1997)	SERVQUAL
Aldridge and Rowley (1998)	Student Charter
Oldfield and Baron (2000)	SERVPERF
Waugh (2002)	SERVQUAL
O'Neil (2003)	SERVQUAL
Banwet and Datta (2003)	SERVQUAL
Sahney, Banwet and Karunes (2003)	SERVQUAL
LaBay and Comm (2003)	SERVQUAL
Tan and Kek (2004)	SERVQUAL
Sahney, Banwet and Karunes (2004)	SERVQUAL
Sohail and Shaikh (2004)	SERVQUAL
O'Neil and Palmer (2004)	SERVQUAL
Telford and Masson (2005)	SERVQUAL
Chen et al. (2006)	SERVQUAL; HEdPERF
Firdaus (2006)	HEdPERF
Smith et al. (2007)	SERVQUAL
Sahney, Banwet and Karunes (2008)	SERVQUAL
Yeo (2008)	SERVQUAL
Brochado (2009)	SERVQUAL; SERVPERF; HEdPERF
Gallifa and Batallé (2010)	SERVPERF
Dado et al. (2011)	SERVQUAL
Shekarchizadeh et al. (2011)	SERVQUAL

Table 10: Service Quality Studies – Base Model 1996-2011

Whilst the model for this research study on corporate education will be built upon a SERVQUAL-informed model, it is recognised that it is possible that the resulting survey instrument for corporate education may be quite different from the original SERVQUAL questionnaire.

In order to address some of the criticisms of the SERVQUAL approach and in order to utilise some of the positive features of previous studies a number of features will be added into the model, as outlined in table 11.

<b>Criticism of SERVQUAL</b>	<b>Proposed Solution</b>
Too many dimensions	The dimensions will be kept to a manageable number and issues will be integrated where possible
Negatively-worded statements within the questionnaire create an unhelpful method factor	Questionnaire statements will be positively worded
A seven point Likert scale creates a lack of labelling of points two and six	The questionnaire will utilise a five point Likert scale
<b>Features of SERVQUAL Studies</b>	<b>Proposed Inclusion</b>
Initial qualitative research	Initial qualitative research will be required to elicit dimensions for a questionnaire
A SERVQUAL-informed survey questionnaire instrument	A SERVQUAL-informed survey questionnaire instrument will be utilised to determine expectations and perceptions of service quality
Cronbach alpha analysis	Cronbach alpha will be utilised within the analysis to determine convergent validity
Factor analysis	Factor analysis will be utilised to determine the structural integrity of the questionnaire
Weighted SERVQUAL	Weighted SERVQUAL will be utilised to determine the rankings of dimensions

Table 11: Research Features

### 3.14. A Gap in Knowledge

This chapter has demonstrated that a clear gap exists within the evaluation literature. The evaluation literature has focused on the importance of measuring outcomes and return on investment. However, this search for the 'holy grail' has often been unsuccessful leading to a degree of scepticism and disillusionment. A careful search of the literature reveals that evaluation studies have not focused on the expectations and perceptions of service quality within a corporate education context. Furthermore, the concept of 'return on expectations' has never been fully tested within a corporate education setting, although it has been suggested as a relevant concept within the evaluation literature (Voller, 2010b, p8). Chapter three has also demonstrated that a clear gap exists within the service quality literature. Whilst it is evident that many service quality studies have investigated the gap between expectations and perceptions within the higher education sector, they have focused exclusively on open education and have failed to address

the context of corporate education. Furthermore, they have failed to address the expectations and perceptions of multiple stakeholders within the corporate education process, who are critical to success.

The gaps identified within the evaluation literature and the service quality literature, together with the conceptual and practical uniqueness of the corporate education context demonstrate that new research in this area should make a useful contribution to knowledge within the higher education academic community. It is a contribution that this research study sets out to provide.



## Chapter Four – Research Methodology

### 4.0. Introduction

*Synopsis: This chapter explores the research methodology utilised in this research study. A variety of potential research philosophies are presented and the pragmatic paradigm is suggested as the most appropriate for delivering the research objectives. This is followed by an outline of the research design, which includes a sequential, cross-sectional mixed methods approach. The research methods are outlined in some depth and include initial semi-structured interviews, an online survey questionnaire and follow-up semi-structured interviews. The data analysis approaches are then explored, including interview coding analysis and quantitative techniques such as factor analysis, Cronbach alpha analysis, and Chi-square analysis. Finally, a variety of issues relating to the research are presented, including sampling, reliability, validity and ethics.*

### 4.1. The Research Paradigm

In understanding the overall research approach it is important to examine the philosophical assumptions that lie at its roots. As Kuhn (1970, p11) states “acquisition of a paradigm and of the more esoteric type of research it permits is a sign of maturity in the development of any given scientific field”. The ontological assumptions are a useful starting point. Ontological claims are “claims and assumptions that are made about the nature of social reality, claims about what exists, what it looks like, what units make it up and how these units interact with each other. In short ontological assumptions are concerned with what we believe constitutes social reality” (Blaikie, 2000, p8). Ontological positions are often divided between foundationalist and anti-foundationalist. The foundationalist view (sometimes termed ‘objectivism’) is that reality exists independently of our knowledge of it, whereas the anti-foundationalist view (sometimes termed ‘constructionism’) is that reality is socially constructed by human actors (Grix, 2004, p61). The research outlined in this chapter is based upon an anti-foundationalist constructionist ontology. Expectations and perceptions, which lie at the heart of many of the service

quality models including SERVQUAL, SERVPERF and HEdPERF are predicated on the notion that reality is socially constructed. Each recipient of corporate education has their own perspective on the value of the educational input they have received, which will differ from others who have had the same experience. Despite the use of a survey instrument which seeks to obtain quantitative data, the results are nonetheless subjective and based on the recipients' interpretation.

Following on from the ontological assumptions, it is important to understand the epistemological assumptions behind the research approach. The philosophy of epistemology is derived from the Greek words episteme (knowledge) and logos (reason) and has to do with gathering knowledge of social reality (Grix, 2000, p63). Two of the most important epistemological positions used in social science research are positivism and interpretivism. These are two different, if not mutually exclusive, epistemological perspectives about the way in which knowledge is developed and judged as being acceptable (Saunders, Lewis and Thornhill, 2007, p83). They are best understood as extremities of a continuum. Along the continuum the features and assumptions of one paradigm are gradually relaxed and replaced by those of the next (Collis and Hussey, 2009, p57). Positivism advocates the application of the methods of the natural sciences to the study of social reality. It argues that only phenomena confirmed by the senses can be warranted as knowledge. Knowledge is arrived at by gathering facts that provide the basis for laws. Science must be conducted in a way that is value free. Interpretivism on the other hand advocates the methods of the social sciences and argues that social scientists should grasp the subjective meaning of social action (Bryman, 2004, p13). In contrast to positivism, which asserts that social phenomena must be observable and measurable, interpretivism focuses on exploring the complexity and richness of social phenomena with a view to developing interpretive understanding (Collis and Hussey, 2009, p57).

Two further epistemological positions have been articulated within the research literature, namely realism and pragmatism. Realism believes that both the natural and the social sciences can apply the same approaches to

the collection of data and that there is an external reality that is separate to our descriptions of it. There are two forms of realism. Firstly, empirical realism (sometimes termed naïve realism) which asserts that, through appropriate methods, reality can be objectively understood and secondly, critical realism, which argues that scientists' conceptualisations are a way of knowing that reality. Thus they allow into their explanations of reality, terms that are not directly observable (Bryman and Bell, 2003, p15). Pragmatism, on the other hand, is a philosophical position with a respectable history which goes back to the work of Dewey, Pierce and James. Pragmatists believe truth to be “what works” (Robson, 2002, p43). Pragmatism advocates that researchers should be free to mix methods from different paradigms. Howe (1988, p15) argues that qualitative and quantitative approaches are compatible and Reichardt and Rallis (1994, p85) contend that there are enough similarities in the fundamental values between the two to “form an enduring partnership”. Saunders et al. concur, arguing that mixed methods, both quantitative and qualitative, are possible and often highly appropriate, within one study (2007, p110). Curran and Blackburn, (2001, p123) argue that this pluralist approach is an attempt to “cross the divide between the quantitative and the qualitative and the positivist and the non-positivist”. Tashakkori and Teddlie (1998, p30), argue that a pragmatist approach is intuitively appealing because (a) it provides a paradigm that embraces mixed method and mixed model designs, (b) it eschews the use of metaphysical concepts like truth and reality, and (c) it presents a very practical and applied research philosophy. They argue “you should study what interests you and is of value to you, study in the different ways that can bring about positive consequences within your value system”. A key feature of pragmatism is that “the research question should be of primary importance – more important than the method or the philosophical worldview that underlies the method” (Cresswell, 2011, p44).

Pragmatism has been chosen as the paradigm for this research study, on the basis that this approach provides the best chance of eliciting clear answers to the research questions. The research questions are highly practical involving an analysis of existing tools used to evaluate corporate education programmes, plus the design and implementation of a new survey instrument

to measure expectations and perceptions of corporate education programmes. It is believed that a mixed methods approach, which fits well with a pragmatic paradigm, will help to achieve these objectives.

The mixed methods approach in this research study follows three key stages. Stage one of the research involves a qualitative approach to design and refine an appropriate survey instrument. Stage two involves a quantitative approach which utilises a questionnaire survey to measure expectations and perceptions in relation to service quality for corporate programmes. Stage three involves a further qualitative approach which seeks to follow-up the findings of the questionnaire and to provide a richness of data for interpreting and elaborating the results. The use of a qualitative approach at the end of the research process is unusual for service quality studies of this nature but it is the researcher's belief that a quantitative approach alone, cannot get to grips with the complex richness of detail and the nuances of phenomena which surround the issues of expectations and perceptions of service quality in relation to corporate education programmes. The use of a mixed methods approach enables different methods to be used for different purposes in a research study and serves to provide triangulation (Saunders et. al, 2007, p147). The combination of a structured survey and more open-ended interview questions enables the researcher to check the possible eccentricities of a particular technique and ensure a rich depth of understanding and knowledge in relation to the perceived value of corporate programmes.

#### **4.2. The Research Design**

The research design chosen for this study was a cross-sectional design, sometimes referred to as a survey design. Key features of this approach are as follows: more than one case (an important aspect is variation); at a single point in time; and involving patterns of association. It is usually used in association with quantitative data but can also involve qualitative research in the form of unstructured or semi-structured interviewing with a range of people (Bryman, 2004, p41-45). One or two research studies on service

quality have advocated a longitudinal design, (Aldridge and Rowley, 1998, p1; O'Neill, 2003, p320), but the vast majority have made use of a cross-sectional design, as evidenced by table 12.

Author(s)	Base Model	Design
Soutar and McNeil (1996)	SERVQUAL	Cross-sectional
Anderson and Zwellling (1996)	SERVQUAL	Cross-sectional
Cuthbert (1996)	SERVQUAL	Cross-sectional
Pariseau and McDaniel (1997)	SERVQUAL	Cross-sectional
LeBlanc and Nguyen (1997)	SERVQUAL	Cross-sectional
Aldridge and Rowley (1998)	Student Charter	Longitudinal
Oldfield and Baron (2000)	SERVPERF	Cross-sectional
Waugh (2002)	SERVQUAL	Cross-sectional
O'Neil (2003)	SERVQUAL	Longitudinal
Banwet and Datta (2003)	SERVQUAL	Cross-sectional
Sahney, Banwet and Karunes (2003)	SERVQUAL	Cross-sectional
LaBay and Comm (2003)	SERVQUAL	Cross-sectional
Tan and Kek (2004)	SERVQUAL	Cross-sectional
Sahney, Banwet and Karunes (2004)	SERVQUAL	Cross-sectional
Sohail and Shaikh (2004)	SERVQUAL	Cross-sectional
O'Neil and Palmer (2004)	SERVQUAL	Cross-sectional
Telford and Masson (2005)	SERVQUAL	Cross-sectional
Chen et al. (2006)	SERVQUAL & HEdPERF	Cross-sectional
Firdaus (2006)	HEdPERF	Cross-sectional
Smith et al. (2007)	SERVQUAL	Cross-sectional
Sahney, Banwet and Karunes (2008)	SERVQUAL	Cross-sectional
Yeo (2008)	SERVQUAL	Cross-sectional
Brochado (2009)	SERVQUAL & SERVPERF & HEdPERF	Cross-sectional
Gallifa and Batallé (2010)	SERVPERF	Cross-sectional
Dado et al. (2011)	SERVQUAL	Cross-sectional
Shekarchizadeh et al. (2011)	SERVQUAL	Cross-sectional
Kong and Muthuasamy (2011)	Grönroos PSQ	Cross-sectional

Table 12: Service Quality Studies – Research Design 1996-2011

It was felt that a cross-sectional design would have many advantages. It would establish peoples' attitudes in terms of what they think, believe, value or feel (Jankowicz, 1991, p166). It would allow the researcher to collect a large amount of data from a sizeable population in an economical way. Being a standardised approach, it would allow easy comparison of relationships between variables (Saunders et al, 2007, p138). It would also be less expensive and time-consuming than a longitudinal study (Wilson, 2010,

p112). However, it was recognised that there would be a number of challenges in using this approach. The quality and quantity of information would depend on the willingness of participants to cooperate and if they did cooperate, they might interpret a question in a manner that differs from the researcher's intention (Blumberg et al, 2005, p247). The data collected by the cross-sectional approach would be unlikely to be as wide-ranging as those collected by other means as there is a limit to the number of questions that can be placed in interviews and within questionnaires (Saunders et al, 2007, p139). Further challenges in this approach would include how to select a sample that is large enough to be representative of the population and how to isolate the phenomena under study from all other factors that could influence a correlation (Collis and Hussey, 2009, p77).

The research design utilised in this study also involved a sequential, mixed-method design. This approach is utilised when a researcher begins with and prioritizes the collection and analysis of qualitative data in the first phase, before conducting a second, quantitative phase to test or generalise the initial findings. Finally the researcher interprets how the quantitative results build on the initial qualitative results. This design is particularly useful when the researcher needs to develop and test an instrument because one is not available. It is especially useful when the researcher seeks to generalise, and test qualitative exploratory results to see if they can be generalised to a sample and a population (Cresswell, 2011, p87). There are several advantages of this approach. Separate phases make this design straightforward to describe, implement and report; the inclusion of a quantitative component makes the qualitative aspect more acceptable to quantitative-biased audiences and finally, it enables the researcher to produce a new instrument as a product of the research process. However, a number of challenges also exist in using the exploratory design. The multi-phase approach requires considerable time to implement; a small purposeful sample is required in the initial qualitative phase and a larger sample in the second phase to avoid bias in the quantitative phase; a decision is needed about what qualitative information should be used to build the quantitative instrument and

finally, procedures should be taken to ensure that the instrument is valid and reliable (Cresswell, 2011, p89).

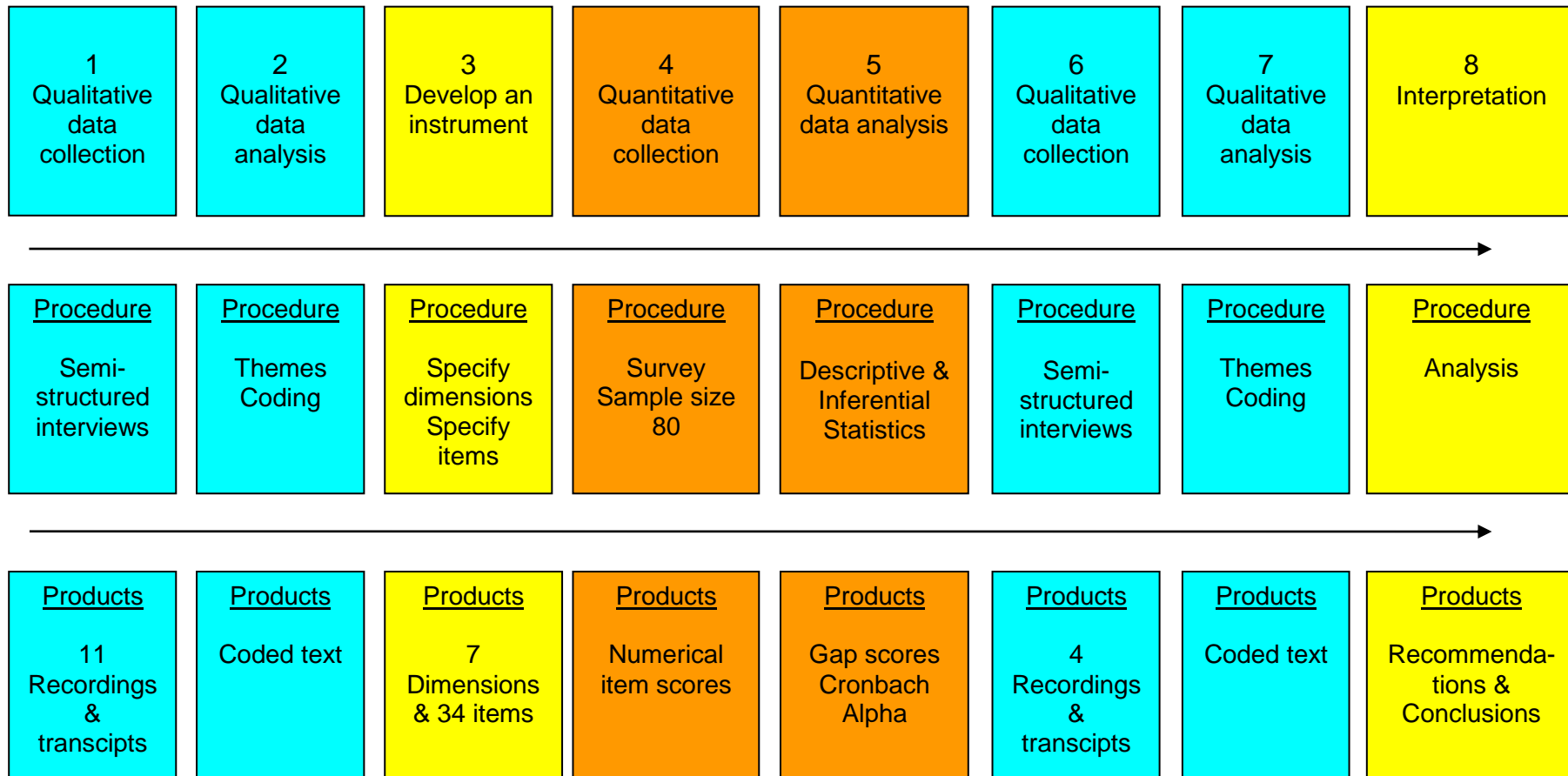
In this research study the sequence of the research process followed the pattern as outlined above. Firstly, a qualitative approach was taken involving a series of interviews with key stakeholders from corporate organisations, including both those who had undertaken a corporate education programme and sponsors. The interview questions and transcripts can be found in appendices 1-11. The aim of these interviews was to elicit information which would serve to design and refine the survey questionnaire at stage two. Whilst many service quality questionnaires, such as SERVQUAL and SERVPERF have been used for a range of industries and sectors, and HEdPERF has been used within the Higher Education sector, the aim of the initial interviews was to determine the key issues specifically in relation to corporate education. In particular it was important to ask interviewees how their expectations and perceptions of corporate education programmes might differ from those of open programme education programmes. This would help to establish whether corporate education was a new context within which to study expectations and perceptions of service quality. The aim was to use these interviews to compose a revised service quality instrument which could determine the value of corporate education programmes. It was recognised that this might look very different from previous service quality questionnaires. Secondly, a quantitative approach was undertaken through the use of a survey instrument designed to measure respondents' expectations and perceptions of service quality. The survey questionnaire can be found in appendix 14. A pilot survey tested for any obvious weaknesses in the survey instrument before the main survey was undertaken within four corporate organisations. Following the survey, descriptive and inferential statistical analysis was conducted to provide a foundation for interpreting the results. Thirdly, an addition to the normal sequential mixed methods pattern was undertaken. The interpretive stage involved a series of interviews with the learning and development teams within the same corporate organisations. The purpose of these interviews was to probe the findings from the survey questionnaire in more depth. In particular, the aim of these interviews was to

elicit more information as to why the dimensions of the survey instrument had scored as they had, plus to elicit ideas as to how any weaker areas of service quality could be improved for the future. A further aim was to determine whether the survey instrument had been a valuable tool within the evaluation process and, if so, how it could be used more effectively in the future.

The full research process is outlined in diagrammatic form in table 13 below.



Table 13: The PhD Research Process (adapted from Cresswell, 2011)



This research strategy is in line with most service quality research studies that have used either the SERVQUAL, SERVPERF or HEdPERF instruments. In considering stage one of the research, the majority of previous studies have used focus groups as a means of eliciting background information to design and refine the questionnaire instrument. In the case of this research study on the service quality for corporate programmes it would have been difficult to use focus groups due to the disparate nature of corporate clients who are located at different sites around the United Kingdom and due to the extremely busy schedules that most of the key stakeholders maintain. Individual interviews were deemed to be more feasible as a means of developing and refining the survey instrument. By using this approach the researcher was able to make individual appointments at a time which was suitable for each interviewee and gain a positive amount of time for each interview. In stage two of the research strategy the approach utilised was very much in line with previous research studies on service quality. An online questionnaire survey was implemented followed by descriptive and inferential statistical analysis. Stage three of the research involved a departure from most previous studies of service quality which normally stop at stage two. Taking Saunders et al.'s (2007, p139) point that data collected by a cross-sectional survey approach is unlikely to be as wide-ranging as those collected by other means as there is a limit to the number of questions that can be placed in a questionnaire, it was decided to follow up the survey questionnaire with a further round of interviews with the learning and development teams from the corporate organisations involved in the study. Given the high importance placed by corporate organisations on value, it was important that the research study focused not only on 'what' the results of the survey produced, but also on 'why'. This approach would also allow discussion of 'how' the service quality might be improved.

#### **4.3. The Research Focus**

Four units of analysis, in the form of corporate organisations, were chosen as a focus for this study. The organisations included a luxury retail organisation, an insurance company, a builder's merchant and an NHS hospital. The

reasons for the choice of organisations included (a) the fact that permission had been granted to conduct research within these organisations, (b) they included a spread of private and public sector organisations and (c) they were all organisations which were in process of receiving corporate education at higher education level at Anglia Ruskin University in 2012/13 and could therefore be analysed together at a single point in time. The details of these corporate education programmes can be seen in table 14.

Organisation	Programme Type	Programme Title	Cohort Size
Luxury retailer	Work-based	BA (Hons.) Sales	20
Insurance company	Work-based	MBA	35
Builders merchant	Work-based	FdA Management	19
NHS hospital	Work-based	PG Cert Leadership	16
Total			90

Table 14: Corporate Education Programmes – Cohort Size

All the corporate programmes were ‘closed’ in that they were comprised of participants from one corporate organisation. They were also award bearing, in that they would all lead to a higher education degree and all involved face to face delivery. The programmes were also work-based in that they were designed to be highly oriented to real, live workplace issues. The pedagogical approach included work-based projects supported by project team sessions and assessment by highly contextualised assignments or presentations.

#### 4.4. The Sampling Approach

The sampling approach within this research study faced a number of key challenges. The first issue that arises has to do with the focus of expectations. In other words, the key question is ‘whose expectations of whom?’ The answer to this question is complex and could include any of the combinations in table 15.

Stakeholder 1	Stakeholder 2
Expectations →	
Student	University
Student	Learning & Development Team
Student	Line Managers
Student	Senior Management Team
Student	Themselves
Learning & Development Team	University
Learning & Development Team	Students
Learning & Development Team	Line Managers
Learning & Development Team	Senior Management Team
Learning & Development Team	Themselves
Line Managers	Students
Line Managers	University
Line Managers	Learning & Development Team
Line Managers	Senior Management Team
Line Managers	Themselves
Senior Management Team	Students
Senior Management Team	University
Senior Management Team	Learning & Development Team
Senior Management Team	Line Managers
Senior Management Team	Themselves
University	Students
University	Learning & Development Team
University	Line Managers
University	Senior Management Team
University	Themselves

Table 15: Potential Expectation Stakeholder Options

All the approaches outlined above involve a personalisation of expectations between particular stakeholders. An alternative approach would be to keep the focus of expectations more general and investigate the expectations of the 'corporate education experience'. This approach would shift the emphasis away from specific service providers towards expectations of the programme in general terms. This would entail a move away from the service quality approaches such as SERVQUAL SERVPERF and HEDPERF, with their emphasis on the level of customer satisfaction with a particular service provider, towards the expectations of the corporate education experience as a whole. Instead of value-laden judgements on the merits or demerits of specific service providers within the complex corporate education mix, this approach would focus on the corporate education experience as a whole and the extent to which it had met expectations. This would suit the spirit of partnership in

which corporate education is conducted, encourage stakeholders to provide more authentic answers, avoid a 'blame culture' and focus on what really matters in corporate education, which is greater organisational effectiveness. The stakeholder mapping in this case would be as follows:

Stakeholder 1	Programme
Expectations →	
Students	Corporate Education Experience
Line Managers	Corporate Education Experience
Learning Development Team	Corporate Education Experience
Senior Management Team	Corporate Education Experience
<i>University (not a focus for the research)</i>	<i>Corporate Education Experience</i>

Table 16: Chosen Expectation Stakeholder Options

Given the level of complexity in the interaction of expectations within corporate education it was therefore decided, for the purposes of this research study, to focus on the 'corporate education experience', rather than specific service providers. A decision was also made to focus on organisational expectations only, rather than those of the university, due to time constraints and the nature of the researcher's role in the university's delivery of corporate education programmes. The sampling approach taken in this research study was as follows:

Stage One Interviews	
Stakeholders	Sample Size
<b>Luxury retailer</b>	
Student	2
Learning and Development Team	1
Senior Management Team	1
<b>Insurance company</b>	
Student	1
Learning and Development Team	1
Senior Management Team	1
<b>Builders merchant</b>	
Student	1
Learning and Development Team	1
<b>Regional Hospital</b>	
Student + Learning and Development Team	1
Senior Management Team	1
<b>Total</b>	<b>11</b>

Table 17: Stage One Interviews – Sampling Approach

Stage Two Survey Questionnaire	
Stakeholders	Sample Size
<b>Luxury retailer</b>	
Student	4
Line Manager	5
Learning and Development Team	2
Senior Management Team	2
<b>Insurance company</b>	
Student	7
Line Manager	3
Learning and Development Team	2
Senior Management Team	5
<b>Builders merchant</b>	
Student	3
Line Manager	4
Learning and Development Team	2
Senior Management Team	1
<b>Regional hospital</b>	
Student	4
Line Manager	2
Learning and Development Team	2
Senior Management Team	2
<b>Total sample size</b>	<b>50</b>
<b>Total no. of potential participants</b>	<b>80</b>
<b>Response rate</b>	<b>62.5%</b>

Table 18: Stage Two Questionnaires – Sampling Approach

Stage Three Interviews	
Stakeholders	Sample Size
<b>Luxury retailer</b>	
Learning and Development Manager	1
<b>Insurance company</b>	
Learning and Development Manager	1
<b>Builders merchant</b>	
Learning Development Manager	1
<b>NHS hospital</b>	
Learning and Development Manager	1
<b>Total</b>	<b>4</b>

Table 19: Stage Three Interviews – Sampling Approach

The personal nature of corporate programmes in which all individual students receive personal attention through tutoring, project work and mentoring led to the expectation that there would be a strong commitment on their part to being involved in the research process. This expectation was strengthened by the wider commitment of the organisations themselves. Learning and

development staff within the organisation had a strong interest in the results of the research and therefore had a vested interest in encouraging the stakeholders to take part.

The approach undertaken in this research study utilised a purposeful homogeneous sampling pattern. Purposeful sampling enables the researcher to use their judgement to select cases that best answer the research question(s) and meet their objectives. Homogeneous sampling focuses on one particular sub-group in which all the sample members are similar (Saunders et al, 2009, p232). The homogeneous groups included four distinct stakeholder groups, namely the students on the programme, the learning and development team, the line managers and the senior management team. The students on the corporate education programmes were important as they had first-hand experience of experiencing the educational provision and were therefore well qualified to make judgements on the nature of the service quality they had received. The learning and development team had been closely involved in designing, implementing and evaluating the corporate education programmes. The line managers had a keen interest in ensuring that their staff gained maximum impact from the programme and were able to apply the learning into their workplace. Finally, the senior management were able to provide insight into the strategic benefits of the corporate education experience.

## **4.5. The Research Methods**

### **4.5.1. Interviews**

In both stage one and stage three of the research process semi-structured interviews were chosen as the means of data collection. Stage one interviews took place between January and March 2013 and stage three interviews between November 2013 and January 2014. All the interviews were conducted face-to-face, using a semi-structured approach, whereby the researcher has a schedule of topics but has latitude to vary the questions in ways that seem sensible as the interview progresses (Fisher, 2010, p175). It

was felt that this approach would provide the ability to engage in both verbal and non-verbal communication and would allow respondents to answer the questions in-depth (Wilson, 2010, p138). Semi-structured interviews would also provide adaptability in the delivery of questions, allowing the interviewer to follow-up ideas, probe responses and examine motive and feelings (Bell, 1993, p91). A further benefit of semi-structured interviews would be the potential development of illustrative quotes (Cameron, 2009, p368). Oppenheim (1992, p81) also points out that interviewers can give a more prepared explanation of the research purpose than can be given through a covering letter. It was recognised that there are disadvantages to the face-to-face semi-structured interview approach. Some questions may be perceived as embarrassing or sensitive (Wilson, 2010, p139), an issue which could easily arise when discussing the reasons for corporate education programmes with senior stakeholders within the organisation. Interviews are highly time-consuming for both the interviewer and interviewee (Cameron, 2009, p369) which could be an important issue when requesting time from senior stakeholders with an extremely busy schedule. Oppenheim (1992, p83) also mentions cost and time factors as being important. In obtaining interviews with stakeholders from corporate organisations, both travel costs and the time commitment involved in travel and in the coding operation required for analysis, would be high. A further problem with interviews relates to the difficulty of keeping a note of the answers when there is a rich stream of data (Collis and Hussey, 2009, p195).

Of more serious concern in utilising the interviewing approach, however, would be the danger of bias. This might include interviewer bias, whereby the comments, tone or non-verbal behaviour involved in the questioning may be suspect or an attempt might be made to impose one's own beliefs or frames of reference on those being questioned. Alternatively, there could be a danger of interviewee bias, whereby the interviewee may be influenced by the person of the interviewer or may choose not to reveal some issues due to their sensitivity. Interviewee bias may also be caused by certain key individuals choosing not to take part (Saunders et al, 2007, p318). Bias was an issue of some concern in the course of this research process due to the nature of the



relationship between the interviewer and the interviewees. The interviewer and author of this research has the role of Director of Corporate and UK Partnerships at Anglia Ruskin University. The interviewees were comprised of key stakeholders of corporate education programmes with which the interviewer had been involved. A potential danger existed that the interviewees would tell the interviewer what they thought they wanted to hear, or would withhold negative perceptions, or would express negative perceptions in a manner that betrayed tension between the two parties.

In order to address potential interviewer bias, a pilot interview was conducted with an experienced learning and development manager from a university hospital, with experience in conducting research projects. At the end of the interview, the participant was asked whether they felt that any of the questions were leading and whether they had any concerns about the way in which the interview had been conducted. The participant judged that the questions were not in any way leading and that the interview had been conducted in a professional manner. In order to address interviewee bias, a number of points can be made. The first relates to the nature of the participants. They were all reasonably experienced managers within their respective organisations with many years of experience in their roles. They were not unwilling to call a spade a spade. If they had criticisms of the corporate education programme or of the university, they would be more likely to express them. Indeed, the results of the research, as outlined later in chapter six demonstrate that they did in fact make criticisms relating to the university support received.

Nonetheless, the recognition of bias in the research led the researcher to draw up an interview protocol, which would attempt to alleviate some of the potential problems with the research. The protocols are shown in table 20.

Potential Interview Problem	Proposed Solution	Achieved
Sensitive, misleading, embarrassing or leading questions	A pilot interview would be assessed for sensitive or embarrassing questions by the interviewee. Any problematic questions would be revised or deleted	Yes
Time consuming nature of interviews	Interviewees would be asked to determine the timing of the interview at a point when it was most convenient. The interviews would be kept to one hour maximum and a topic schedule with timings would be drawn up	Yes
Recording the responses to the questions	Interviewees would be asked for permission to record the interviews on dictaphone. This would ensure that no responses were lost. The transcripts would be typed up word for word.	Yes
Time & cost factors for the interviewer	An interview timetable would be drawn up. Where possible interviews would be combined with work-related visits in the same area	Yes
Interviewer bias	Interview questions and subsequent coding analysis would be checked for bias and coding accuracy by third party expert reviewers.	Yes
Interviewee bias	Prior to the start of the interviews, interviewees would be assured of confidentiality and assured of a lack of defensiveness on the part of the interviewer to encourage them to provide truthful answers	Yes

Table 20: Interview Protocols

#### 4.5.2. Questionnaire

Stage two of the research process involved the use of a questionnaire which was designed to evaluate service quality. As already noted in the literature review, much debate has been given to exactly which existing instrument is best used for this process. Three of the best known instruments are SERVQUAL, first developed by Parasaruman et al (1985), SERVPERF, first developed by Cronin and Taylor (1992) and finally HEdPERF, first developed by Firdaus (2006b) for the Higher Education sector. All three instruments have been judged as useful tools in the evaluation of service quality (Buttle, 1996; Brochado, 2009). The question arose in the process of this research as to

which instrument would be best suited to provide a baseline model for the evaluation of service quality within corporate education. As already noted at the end of chapter three, the instrument chosen as a baseline model was SERVQUAL. The reasons for this choice were as follows. Firstly, SERVQUAL was a better fit for both the research objectives and for the logic of the literature review, in that it focuses on both expectations and perceptions whereas SERVPERF and HEdPERF focus on perceptions of performance only. A key objective of this research was to evaluate the importance of expectations which made SERVQUAL a good fit. Secondly, as Parasaruman et al. (1988, p30) have pointed out, SERVQUAL provides a basic skeleton for the evaluation of service quality, but “the skeleton, when necessary, can be adapted or supplemented to fit the characteristics or specific research needs of a particular organisation”. Whilst the aim of this research process was to evaluate service quality within the higher education sector, it is also true to say that corporate education is, in a sense, education within organisations, since much of the pedagogical approach takes place in a work-based setting. Most corporate education involves a partnership between the higher education institution and a particular organisation. The fact that SERVQUAL has been successfully applied in a wide variety of industries and sectors made it an ideal instrument of choice. Thirdly, SERVPERF and HEdPERF, whilst relevant to the higher education sector have not been tested to the same degree as SERVQUAL. Whilst initial studies have demonstrated their validity and reliability (Brochada, 2009), further studies are needed to establish their credentials in a wider variety of higher education settings. Whilst SERVQUAL would be used as a baseline model, it was recognised that the survey questionnaire for corporate education might look quite different from SERVQUAL. In this sense, it would be better to see the survey questionnaire for corporate education as ‘SERVQUAL-informed’, rather than as a type of SERVQUAL questionnaire. It was also recognised that a SERVQUAL-informed model would not be enough on its own to draw out the key features of the corporate education experience. Although the survey questionnaire for corporate education would provide a quantitative baseline measuring the gap between expectations and perceptions, the results would need to be followed up by qualitative interviews. The questionnaire survey

would examine ‘what’ gap existed between expectations and perceptions, but follow up qualitative interviews would need to investigate ‘why’.

Once the research was completed, it became clear that the survey questionnaire for corporate education was indeed different from SERVQUAL and other service quality questionnaires. Seven new dimensions relevant to corporate education were determined, based on the responses and analysis gained from the stage one interviews. Each dimension contained statements, as outlined below in table 21, which formed the basis of the questions to be used within the questionnaire survey. The dimensions and associated statements are outlined as follows:

Dimension	Statements
University Support	5
Organisational Support	5
Return on Investment	4
Career Development	4
Credibility	4
Contextualisation	4
Collective Learning	4
Partnership	4
Total	34

Table 21: Corporate Education Expectation Dimensions

The questionnaire was created as an online survey and made use of the Bristol Online Survey licence, purchased by Anglia Ruskin University. The format of the questionnaire included five sections. The first section included biographical information including age, gender and organisational sector. The second section included a series of questions, based on the dimensions and items outlined above, relating to expectations of the corporate education experience. These were arranged in a 5-point Likert scale from strongly agree to strongly disagree. All statements were worded positively, despite the fact that some writers advocate the use of both positive and negative statements in the scale to ensure respondent concentration (Saunders et. al, 2007, p372). A positively-worded approach was taken in this research study following the early debates in the service quality literature on this issue. Parasaruman et al (1988) originally included both positive and negative statements in the

SERVQUAL scale but later received strong criticism from Babakus and Boller (1992, p254) who concluded that the item wording produces a 'method factor'. The wording may create factors that are method artifacts rather than meaningful dimensions of service quality. This caused Parasuraman et al (1991) to revise their scale to include positive statements only. The third section included a weighted scale whereby respondents were asked to rank the 7 dimensions in order of importance. The fourth section included a series of questions, based on the dimensions and items outlined above, relating to perceptions of the corporate education experience. Finally respondents were asked to summarise their overall judgement on the corporate education programme and supply any other issues relating to expectations and perceptions that they deemed to be important. The questionnaire can be found in appendix 14.

The questionnaire was distributed electronically between April and September 2013. The response rate was 62.5%, which was considered to be an acceptable rate of return.

## **4.6. Analysis**

### **4.6.1. Interview Analysis**

Interviews for both stage one and stage three were converted into typewritten word-for-word transcripts (appendices 1-11 for stage one and appendices 25-28 for stage three). In both cases, this was followed by a thematic analysis designed to elicit major issues of interest. It was recognised that many of the themes were scattered throughout the text and were not always tied to particular questions. A thematic approach would be the best means of collating issues and ideas, which would then form the basis for detailed analysis. The thematic analysis was facilitated by means of a coding exercise. Coding is defined by Gibbs (2007, p38) as "a way of indexing or categorising the text in order to establish a framework of thematic ideas about it". Saldana (2009, p3) defines a code as "a word or short phrase that symbolically assigns a summative, salient, essence-capturing and/or evocative attribute for a

portion of language-based or visual data". In particular, coding provides the opportunity to retrieve all the passages coded with the same label and combine them together to create an overall picture of the same phenomenon. The decision was taken not to use a software package such as Nvivo for this task. Initially it had been envisaged that a software package would be used as a tool to analyse the data, but the relatively small number of interviews (11) meant that a manual approach to the data analysis and coding was perfectly feasible. This approach is supported by Basit (2003, p143) who compared the differences between manual and electronic coding and concluded "the choice will be dependent on the size of the project, the funds and time available and the inclination and expertise of the researcher. The coding process in this research project was undertaken using the following process. The decision was made to apply a data-driven or open coding approach which would try, as far as possible, to start with no preconceptions. It was recognised that the researcher would inevitably have views on what they might expect the results to be, based on his knowledge of corporate education programmes, but the aim was to try, as far as possible, to let the text speak for itself. The coding approach followed Saldana's first cycle, second cycle approach (2009, p45). The first cycle involved initial coding using a line-by-line approach (Gibbs, 2010, p52) whereby brief words or phrases were added to a column next to the interview text, which summarised the main points that the interviewee was deemed to be making, without attempting to use any pre-conceived ideas or phrases that had been derived beforehand. The second cycle involved a pattern coding approach whereby the codes were further refined by arranging codes with similar content into groups (Saldana, 2009, p152). This was handled most effectively by a colour coding exercise which provided a strong visual indication of which codes were grouped naturally together. The next step was to determine a coding hierarchy by identifying words or phrases which best represented an overall category or dimension. These were colour coded in bold print and were designated as primary codes. Within the primary codes, a range of secondary codes were identified which elaborated the themes in more detail. Once the entire task was completed, it was possible to identify a coding tree and determine the frequency of the codes within the interview texts.

#### **4.6.2. Questionnaire Analysis**

The responses from the survey questionnaire were subjected to two main types of statistical analysis, descriptive and inferential analysis. The descriptive statistical analysis consisted of several sections. Firstly, the overall responses to each item within each dimension were calculated in the form of weighted averages. Weighted averages were calculated for expectations, perceptions and gap score between the two. Secondly, each dimension was ranked in order of importance with rank one as the highest importance and rank seven as the lowest importance. Thirdly, the overall satisfaction score was calculated and expressed as both a weighted average and as a percentage score. Finally, biographical information such as age, gender, qualification and length of tenure were all calculated and expressed as percentages. The descriptive analysis was first conducted in overall terms for all four organisations involved in the research study. Subsequently, a more detailed descriptive analysis was conducted for each individual organisation and for two major stakeholder groups which provided a more in-depth perspective on the results. The overall descriptive statistics results for all four organisations can be found in appendix 15 and the more detailed results for each individual organisation and stakeholder group in appendices 16-19.

The inferential statistical analysis included factor analysis, Cronbach alpha analysis and chi-square analysis. Firstly, confirmatory factor analysis was utilised, through the use of SPSS, to identify factors and to determine the structural integrity of the questionnaire survey tool. In particular factor analysis would confirm (or not) the dimensions identified through the coding analysis within the stage one interviews. In utilising factor analysis, it was recognised that the sample size gained from the questionnaire survey was low at only 50 respondents. Many writers argue that a stable factor solution requires a sample size of 300 or more respondents. However, as Field (2013, p684) articulates, whilst 300 or more respondents is an ideal sample size, the picture is more complicated than that. A smaller sample size may still be reliable. Despite the low sample size, the decision was made to attempt factor analysis and determine whether it provided confirmation for the structural

integrity of the questionnaire survey tool. As part of the factor analysis, the Kaiser-Meyer-Olkin (KMO) test was utilised as a test of sampling adequacy to test whether the sampling size was sufficient to yield a reliable set of factors. Secondly, Cronbach alpha was utilised through SPSS to test for internal reliability and to determine the extent to which items within a particular dimension on the survey questionnaire were associated with one another. Whilst factor analysis would test the structural integrity of the questionnaire as a whole, Cronbach alpha would provide a more detailed test of reliability and of the structural integrity within each dimension. Thirdly, Chi-square analysis was utilised to cross-tabulate biographical information such as age, gender, qualification and length of tenure against the expectation and perception results for each item within the questionnaire. Null and alternative hypotheses were produced and the data was tested against them using SPSS.

#### **4.7. Reliability and Validity**

Reliability is achieved if the research can be replicated within a different sample and achieve similar results. For this purpose clear documentation of the research steps was maintained using a research protocol and plan which would allow future researchers to follow the same approach. An example can be found in appendix 12, which provides a rationale for the link between the coding analysis at stage one and the survey questionnaire statements at stage two. Internal reliability was also achieved at stage two by conducting the Cronbach Alpha test on each of the dimensions. This was in line with many previous SERVQUAL-type studies. Bryman and Bell (2003, p170) argue as ‘a rule of thumb’ that scores of 0.8 are considered to be ideal although he states that many researchers will work with a slightly lower figure.

Validity is “the extent to which the research findings accurately represent what is really happening in the situation” (Collis and Hussey, 2003, p56). Convergent validity was assessed by means of factor analysis and Cronbach alpha. As outlined above the factor analysis tested the overall structural integrity of the questionnaire survey tool and Cronbach alpha tested the reliability the extent to which the various scale items ‘converged’ or correlated



with other measures of the same construct. Content validity was achieved following the stage one interviews through the use of a small expert panel, comprised of PhD supervisors from other universities. Following the initial stage one interviews the panel checked the stage one interview transcripts and the subsequent coding analysis. They were asked to assess whether the coding analysis was a fair representation of the transcript texts and whether the resulting dimensions and items to be utilised within the survey questionnaire at stage two were a fair reflection of the coding analysis. Both experts confirmed that the coding analysis had been handled accurately and that there was an accurate connection between the coding and the survey questionnaire questions (see appendix 13). Content validity was also achieved within the stage three interviews through specific questions aimed at learning and development team managers within each participating organisation which were designed to confirm the accuracy of the survey questionnaire results. As noted by Babakus and Boller (1992, p32) often content validity involves a qualitative approach and is confirmed through discussions with customers and interviews with company executives. The code 'corroboration' was noted on every occasion that a respondent agreed that the results made sense. The high frequency of mention for this code demonstrated that the stage two survey questionnaire results were accurate and were a fair reflection of the corporate education experience that was actually happening within each participating organisation.

#### **4.8. Triangulation**

The use of a mixed method research approach served to provide triangulation (Saunders et al, 2007, p174). Collis and Hussey (2009, p85) define triangulation as "the use of multiple sources of data, different research methods and/or more than one researcher to investigate the same phenomenon in a study". They argue that using different methods to study the same phenomenon can lead to greater validity and reliability than a single method approach. Denscombe (2010, p348) states that there are four main types of triangulation: methodological, data, investigator and theory triangulation. This research study made use of data triangulation (data

collected at different times or from different sources in the study of a phenomenon) and methodological triangulation (more than one method used to collect or analyse the data). The rationale for using triangulation is that by viewing a phenomenon from different perspectives, the researcher gets a better knowledge of it. This in turn creates improved accuracy and a fuller picture of what is happening.

#### **4.9. Research Ethics**

Saunders et al (2007, p610) define research ethics as “the appropriateness of the researcher’s behaviour in relation to the rights of those who become the subjects of a research project, or who are affected by it”. Verbal and written permission were first sought and obtained from senior stakeholders within each corporate organisation that took part in this research study (Bell, 1993, p53). Assurances were given that any published work emanating from this project, whether in the form of a PhD or a research paper would keep the name of the organisation anonymous unless prior permission had been given to release it. Prior to all interviews, participants were asked to sign a consent form, which ensured that they had read the introductory letter, they had been given the opportunity to ask questions, they understood their responses would be kept confidential and anonymous, they understood that their involvement was voluntary, they consented to the interview being recorded and consented to undertake the interview (Cameron, 2009, p122). They were also assured that they would have the opportunity to verify statements when the research was in draft form and receive a copy of the final report (Bell, 1993, p54). Prior to all questionnaires, an introductory letter was sent to all participants in the research study, which explained the purpose of the research, emphasised that participation was voluntary and ensured all participants of confidentiality and anonymity (Bryman, 2004, p513). Following data collection, all data was stored securely and dictaphone recordings and written transcripts were stored in a lockable cabinet.

#### **4.10. Conclusion**

In summary, this research study was based upon a constructionist ontology and a pragmatic paradigm and utilised a sequential, cross-sectional mixed methods design. The research methods employed included initial qualitative semi-structured interviews at stage one, followed by a quantitative survey questionnaire at stage two, followed by qualitative follow-up semi-structured interviews at stage three. The units of analysis comprised four organisations from the retail, insurance, building sector and NHS. Sampling was conducted by means of a purposeful, homogenous approach focusing on four stakeholder groups within these organisations including students on the corporate education programme, learning and development managers, line managers and senior managers. Rigour in the research process was maintained by attention to validity, reliability, triangulation and research ethics.

## Chapter Five – Findings

### 5.0. Introduction

*Synopsis: This chapter outlines the findings of the research. The structure of this chapter is divided into three parts. The first outlines the findings from the stage one initial interviews and the results of the coding analysis. The second outlines the findings from the stage two survey questionnaire. This includes both descriptive and inferential statistical analysis of the quantitative results. The third outlines the findings from the stage three follow-up interviews and the results of the subsequent coding analysis.*

### 5.1. Stage One Interviews

The stage one interviews had two main aims. The first was to help to identify and refine the attributes for inclusion within the questionnaire survey at stage two. This was achieved by means of a thematic coding analysis. After a cursory examination of the interview texts it became clear that common themes were evident, but they were scattered throughout the textual material and not tied to particular questions. The most effective method of eliciting common themes was to undertake a thematic analysis through means of a coding exercise drawn from the entire landscape of the interview texts. The second aim was to investigate aspects of expectations and perceptions in greater depth. A specific question analysis (question by question) was therefore implemented for particular issues to allow a direct focus on specific areas of interest.

#### 5.1.1. Interview Analysis

The coding tree shown in table 22 provides an overview of the coding elicited from the interview texts. Primary codes are articulated in bold print and secondary codes in normal print within the table. The frequency of occurrence of each code is articulated within the right hand column.

Coding Tree		
Codes	Total frequency of mention	Frequency – no. of interviewees
<b>A Organisational Support</b>	<b>109</b>	<b>11</b>
A1 Interest & encouragement	11	8
A2 Monitor student progress	13	7
A3 Management of course logistics	4	4
A4 Provision of time & space	17	9
A5 Provision of feedback on assignments	7	5
A6 Mentoring	5	3
A7 Project sign-off	5	4
A8 Celebration of success	3	3
A9 Wider connections	8	5
A10 Answers to student queries	4	4
<b>B Return on investment</b>	<b>68</b>	<b>10</b>
B1 Project outcomes	9	6
B2 Improved staff performance	17	6
B3 Improved staff motivation	6	5
<b>C Career Development</b>	<b>64</b>	<b>10</b>
C1 Selection	10	5
C2 Talent pool	17	9
C3 Succession planning	9	6
C4 Portability	5	2
<b>D University Support</b>	<b>50</b>	<b>8</b>
D1 Knowledge provision	7	3
D2 Flexibility	3	2
D3 Knowledge of organisation & sector	3	2
D4 Lecturer expertise	13	8
D5 Responsiveness	3	3
D6 Feedback on course progress	6	4
D7 Learning resources	4	3
<b>E Credibility</b>	<b>50</b>	<b>4</b>
E1 Organisational credibility	12	4
E2 Sector credibility	14	7
E3 Academic credibility	10	4
E4 Academic success	10	7
<b>F Contextualisation</b>	<b>45</b>	<b>10</b>
F1 Contextualisation of content	3	3
F2 Contextualisation of assignments	2	2
F3 Contextualisation of projects	2	2
F4 Contextualisation to organisational aims & objectives	8	6
F5 Theory into practice	19	7
<b>G Collective learning</b>	<b>37</b>	<b>8</b>
G1 Team building	11	5

G2 Breaking silos	3	2
G3 Networking	4	4
G4 Dissemination of knowledge	8	3
<b>H Partnership</b>	<b>36</b>	<b>4</b>
H1 Co-design	11	6
H2 Co-delivery	4	4
H3 Co-learning	7	5
H4 Co-ownership	4	3

Table 22: Stage One Interviews – Coding Tree

#### 5.1.1.1. Organisational Support

The primary code “organisational support” (A) gained the highest frequency of 109 occurrences and was clearly identified as an important expectation of corporate education. The frequency for this primary code was higher than that for any other primary code which may be reflective of the fact that three questions in the interview were designated to this topic and targeted at three groups, namely learning and development support, line manager support and senior management support. Ten aspects of organisational support were identifiable from the analysis as secondary codes (a) provision of time and space (b) monitoring of student progress (c) management of course logistics (d) encouragement and interest (e) provision of feedback on assignments (f) mentoring, (g) project sign-off, (h) celebration of success, (i) promotion of wider connections within organisation, (j) answers to student queries.

One of the most important expectations relating to organisational support is the provision of time and space to complete the course (A4, 17 occurrences). Participants on corporate education courses are mostly at middle or senior managerial level and experience high demands on their time. The role of the line manager becomes critical in creating space for the participant to attend the corporate education programme. This might include time to attend the teaching days, time off for personal study or the provision of flexible working hours.

*“I would expect them [line managers] to be supportive and to champion the fact that one of their team members was on a ground-breaking and intensive programme. I would expect them to give time off to attend lectures and to understand the complexities of weaving together work and course pressures” (Interviewee G).*

A further expectation relating to organisational support is the monitoring of student progress (A2, 13 occurrences). Once again the role of the line manager is seen as critical to this process. Participants on the course expect their line manager to provide regular 1:1 reviews on a monthly or quarterly basis. In these exchanges it is important for the line manager to provide advice and information as necessary. Line managers may also help the participant to reflect on how well they are applying the material from the course within their workplace.

*“You would expect the line manager to give the person a review on a quarterly basis about how they are doing” (Interviewee C).*

*“I would have expected that they [line managers] would request a 1:1 every now and again because we were taking time off from working on the shop floor.....the manager should be asking what I have gained from my study” (Interviewee H).*

Monitoring of student progress is also expected from the learning and development team. They should have a highly supportive role in ensuring that participants understand the demands of the course and keep up with the academic workload. The learning and development team should also provide regular reviews to answer any questions that participants have about the course.

*“I expected support from the L&D team and engagement with the company. I expected them to keep us on track with everything and provide support....I would expect monthly reviews, giving feedback on*

*assignments, what has been done well and what has not” (Interviewee I).*

An important expectation related to monitoring progress is the provision of feedback on assignments (A5, 7 occurrences). Participants on corporate education courses expect their assignments to be read by both line managers and ideally by more senior staff within the organisation.

*“Line managers could also read assignments and give inspiration and ideas or praise, or ask challenging questions” (Interviewee C).*

*“We were told that our dissertations would be read by our Executive Leadership Team after they had been finished, so we all submitted our dissertations to them. I would have expected them to evaluate the projects afterwards” (Interviewee E).*

The reasoning behind this expectation is that the majority of assessments in corporate education courses are highly contextualised to the organisation and are designed to provide timely solutions to problems that the organisation is facing. It is therefore of value to line managers to read assignments as they may contain valuable ideas for the future of the organisation that could be taken up in practice. The provision of feedback is also of value to the course participants in terms of providing ideas, sense checking and asking questions, which will sharpen their thoughts and ideas. Feedback also fosters the process of embedding knowledge within the organisation and making the connection between theory and practice.

Underlying much of the desire for organisational support is the expectation that line and senior managers will take an interest in the course and provide encouragement to the students as individuals (A1, 11 occurrences). Participants need to sense that the course matters to the organisation and that key organisational stakeholders wish them to succeed. This ‘feeling’ of interest needs to be backed up by tangible expressions of encouragement which might include attending assessed presentations and asking appropriate



questions or by sending the participants any information that might be relevant to their studies.

*“...that they [senior managers] would be supportive of the programme. They would come to student presentations and advise the students of anything going on that was relevant. Also, to take an interest.” (Interviewee F).*

A further sign of interest might include holding a ceremony at each stage within the organisation to celebrate success and follow up with promotion of the success on organisational websites or publications. Alternatively it might include attending degree ceremonies at the university.

*“Support was there each year in that they [senior managers] would hold a ceremony and make a fuss of it.” (Interviewee E).*

An important aspect of demonstrating interest and encouragement involves assisting students with developing wider connections within the organisation (A9, 8 occurrences). Both line managers and senior managers can act as the gateway to making a wider network of relationships throughout the organisation. This enables participants to break out of their immediate frames of reference and to learn about the organisation from a strategic perspective. The importance of wider relationships within the organisation is especially important in project work, which is often a key part of corporate education courses.

*“I would expect them (line managers) to provide support, mentorship and guidance to the students or help to speak to other people so that the projects could happen” (Interviewee A).*

*“Also, there has been a promise of availability of people to speak to – Directors etc. All our projects have been supported by the business” (Interviewee K).*

Senior managers can help to create the connections that enable course participants to find resources and expertise that they would not ordinarily have access to from within their own role.

A number of further expectations relating to organisational support were also identified from the stage one interviews, with lower frequencies of mention. These included the logistics of the course such as rooming, refreshments, timetables and transport (A3, four occurrences), mentoring by line managers (A6, five occurrences) and project sign-off, which involved senior managers sense-checking project objectives to ensure that they were in line with overall organisational aims (A7 five occurrences). Finally, 'answering student queries' was also noted as an expectation relating to organisational support (A10, four occurrences).

#### **5.1.1.2. Return on Investment**

The primary code return on investment (B) gained the second highest coding frequency of 68 occurrences and is clearly an important expectation of corporate education. This total does not include any references to return on investment in question 16, where the question was directly about return on investment (ROI) in contrast to return on expectations (ROE), as it was felt this would skew the results.

Return on investment remains a high expectation of corporate education. Programmes of this kind are not provided as an enjoyable extra for staff, nor as a means of boosting public relations. The organisation has a clear expectation that the money invested in the education process will provide a return.

*“Return on investment. We don’t do it just for the fun of it. There has to be some sort of benefit for the individual and the organisation”  
(Interviewee D).*

*“ROI is something that we always look at. You know, I am spending all that money, what is it going to add to the bottom line?” (Interviewee J).*

In practice return on investment involves improved staff performance (B2, 17 occurrences). Examples include improved sales, improved skills, improved customer service or improved team-working.

*“So it was about improving my knowledge, improving my sales performance, improving my service, working better as a team and to provide something for the business” (Interviewee I).*

Return on investment may also include improved staff motivation (B3, 6 occurrences). This is important for the participant on the course but also for the wider organisation. A motivated team of key individuals who are involved in management within the organisation can create a ripple effect which impacts whole departments and divisions. The dissemination of learning from the course to the wider organisation may play an important part in this process.

*“I view it as a great personal experience and it has given me more enthusiasm and motivation at work, but that is just for me” (Interviewee H).*

*“There is a knock-on effect from my learning to the wider team - the ripple effect. It creates a happy motivated manager – me – which has an effect on my department. If I am happy, it is good for everyone else” (Interviewee K).*

Return on investment may also include project outcomes (B1, 9 occurrences). Projects are an integral part of many corporate education courses and they are often chosen by senior managers, with organisational aims and objectives in mind.

*“They would want to see some outcomes of the live projects and from the projects that did get done, they did move the organisation forward and there was some return, whether through money or improved quality processes” (Interviewee A).*

Senior managers would expect to be present after the completion of the project to hear a presentation of the results and to assess whether the project has made a real improvement to the organisation.

#### **5.1.1.3. Career Development**

The primary code career development (C) gained the third highest coding frequency of 64 occurrences and is also an important expectation of corporate education. From the perspective of the senior managers within the company there is a concern to develop leaders for the future and from the perspective of participants on the course there is a concern for potential promotion and career enhancement.

*“We wanted to identify the leaders of the future. Rather than go outside and bring people in at great expense” (Interviewee C).*

*“I would expect them to recognise us for our achievement and to look into our career” (Interviewee I).*

An important aspect of career development from the perspective of the organisation as a whole is the development of a talent pool (C2, 17 occurrences). The aim is to educate a group of middle managers which will form a platform from which to choose the next level of senior managers within the company.

*“Ideally the programme will create the next set of Directors. Until now, very few below the level of Director have had degrees. Now we have grown talent, ready to take that step up” (Interviewee K).*

Linked to the development of a talent pool is succession planning (C3, 9 occurrences). It is important to identify potential talent at every level within the organisation so as to create a pipeline of career progression.

*“It was growing the business and leaders becoming more aware of the need for succession planning”. (Interviewee D).*

This is an issue that is easily forgotten within many business organisations and it requires careful deliberation. Corporate education courses are often created as an important ingredient of a wider succession plan for the organisation.

*“It is all part of succession planning. The Executive Leadership team sat round a table and said what happens when we retire or find other jobs. We realised as a company that there was no succession planning at all. So, it was how do we identify who will be the next level for five to ten years’ time” (Interviewee E).*

If succession planning is to be successful the organisation should have a careful selection process (C1, 10 occurrences). Whilst there may be some opportunity for employees to apply direct to a corporate education course, the emphasis should be on senior and line managers targeting individuals with high potential for the future.

*“The learners.....would be the right people for the programme at the right time for the right reasons, not just because they fancied doing it. Selection is important” (Interviewee A).*

The selection process needs to focus, not only on work-related potential but also academic potential. Higher education award-bearing courses require reading, writing and critical reflection skills that can prove a challenge to managers who have been out of the academic world for some time or who will be attempting an award for the first time. The university plays a key role in

selecting those who will be capable of fulfilling the demanding academic challenges of corporate education.

*“In reality, the students have benefited from the support of the university. They gave help in selecting the right people in the first place” (Interviewee F).*

#### **5.1.1.4. University Support**

The primary code university support (D) gained the fourth equal highest coding frequency of 50 occurrences. Eight aspects of university support are important: (a) lecturer expertise, (b) knowledge provision (c) flexible approach (d) understanding of the organisation and the sector (e) course design (f) responsiveness in terms of provision of feedback on assignments and replies to e-mail/phone (g) provision of feedback on course progression (h) learning resources.

The most important expectation relating to university support is lecturer expertise (D4, 13 occurrences). Lecturers are expected to have a wide knowledge of their field.

*“I think the expectation of any university is that they are experts in their fields” (Interviewee B).*

An important element of this expertise is that both the content and the learning and teaching strategy must be of high calibre. Not every academic member of staff will have the capability of teaching within a corporate education context and they need to be chosen carefully by the academic course leader. Moreover, the lecturer must keep abreast of all the latest developments within their chosen area. It is not enough to rely on material from the past. Corporate organisations know their sectors and will demand only the best and latest material.

*“The lecturers and contributors should be of high calibre who are bringing fresh thoughts and insights – not outmoded or out-of-date” (Interviewee G).*

Linked to the issue of lecturer expertise is the expectation of knowledge provision (D1, 7 occurrences). Academics can provide a level of academic rigour that internal training courses cannot provide. This includes theoretical models and concepts as well as critical analysis, research and referencing skills, all of which add depth to the learning process.

*“For this kind of programme, this is where universities shine and the university did shine. I think they delivered exactly what I expected - the academic rigour behind the gut feelings that we all have about how things should be done” (Interviewee B).*

Universities that are involved in a high level of corporate education can also provide a wider perspective both within industries and across sectors. It is common for organisations to become stuck in their own industry dogma and academic staff can stretch the boundaries of their thinking and provide new insights and ideas from other sectors.

*“The university could help us gain more data, more figures and could provide experiences from other businesses. They could help us think ‘are we doing things the right way’ Interviewee H).*

Universities are also expected to provide feedback on course progress (D6, 6 occurrences). Along with line managers and learning and development staff from within the organisation, academic staff members are expected to be involved in the feedback process.

*“At the end of our presentations or when I would complete an assignment, the part they would give feedback on what I did well, what I did less well. The only way you can grow is through feedback. Without that there is no way to improve” (Interviewee I).*

Academic staff members provide feedback sheets for a range of assessments including assignments and presentations. They pay particular attention to the academic rigour of the assessments but, along with organisational staff, can also assess the practical application of ideas.

Four further issues have also been identified as expectations relating to university support, but with lower frequencies of mention. These include flexibility of approach (D2, 3 occurrences), knowledge of the organisation and its sector (D3, 2 occurrences), responsiveness (D5, 3 occurrences) and learning resources (D7, 4 occurrences).

#### **5.1.1.5. Credibility**

The primary code credibility (E) gained the fourth equal highest coding frequency of 50 occurrences.

*“It helps to prove worth and credibility to your division within the company when we go into meetings and support the business. It gives you credibility” (Interviewee E).*

Credibility is an important expectation internally within an organisation (E1, 12 occurrences). An award-bearing corporate education course is often seen as the ‘jewel in the crown’ of the organisation’s training and education portfolio. A high level of time and money is expended by the organisation to make it successful and it is seen by staff members as a course which will help them to achieve their career aspirations. The award-bearing nature of the course raises the overall profile of the organisation by demonstrating high quality and international recognition.

*“We wanted to send out a message to the organisation that the Sales Academy is a high qualification and get recognition for that..... it was easy to say to the business ‘we deliver high quality training’ but we needed a stamp of approval that it was at degree level. It gave us credibility” (Interviewee F).*



Credibility is also seen as an important expectation within a wider industry or sector context (E2, 14 occurrences). Within the public sector a corporate education course provides credibility with regulators whose task is to check standards in all areas including training and education. Within the private sector the course provides a benchmark against competitor organisations and against comparable organisations in other sectors.

*“As an L&D team we expected to gain credibility. It gave us credibility with regulators and to showcase that leaders were gaining some learning and that we could provide that” (Interviewee A).*

*“We wanted to benchmark our work, to look at the credibility of our work” (Interviewee G).*

Academic credibility (E3, 10 occurrences) is also seen as an important expectation. Credibility is gained from the reputation and standing of the academic institution within the academic community. It is also gained from the innovative design, academic rigour and practical application of knowledge that characterises corporate education courses of this kind.

*“The benefit for us was around credibility. It was a stamp of approval that what we are producing in-house is good stuff. It is at academic level” (Interviewee G).*

Credibility is also gained from the level of academic success achieved by the course (E4, 10 occurrences). As part of its quality procedures the university monitors retention and progression rates as well as mean marks and pass rates. The organisation also takes a close interest in the academic achievement of the participants, with the expectation that they will not only pass but achieve high levels of attainment.

*“...an expectation that the programme would be a success for the individual and the organisation.” (Interviewee D).*

*“Obviously the senior management want us all to pass and to make the whole degree programme a success” (Interviewee H).*

Those participants who are deemed to be below the expected threshold will be drawn in to discussions with the learning and development team and may be offered extra support.

#### **5.1.1.6. Contextualisation**

The primary code contextualisation (F) gained the sixth highest coding frequency of 45 occurrences. Examples of interviewee responses on this topic are outlined below. Five aspects of contextualisation are seen to be important: (a) theory into practice, (b) contextualisation to organisational aims and objectives, (c) contextualisation of projects, (d) contextualisation of assignments, and finally (e) contextualisation of content.

An important aspect of contextualisation is the ability to translate theory into practice (F5, 19 occurrences). Organisations are not satisfied with the liberal tradition of learning for its own sake, but instead require learning that can be embedded within practice and related to the workplace. They expect a strong bridge to be made between theory and practice.

*“I wanted to close the gap in my theoretical knowledge and match it to my experiential knowledge” (Interviewee A).*

The learning and teaching strategy will be expected to include reflective exercises, syndicate discussion relating to organisational problems, mentoring and project work, which are all designed to apply the theory to real practical issues being faced by the organisation at the current time.

*“So, even if it involves lots of theories, it is related to something that I can practice in my everyday activity. So, what I learn, I can practice” (Interviewee I).*

A related expectation is the contextualisation of the teaching material to organisational aims and objectives (F4, 8 occurrences). Senior managers are keen to ensure that the learning and teaching strategy is aligned to the mission and objectives of the organisation. Assignment briefs will be designed to solve current organisational problems. Project briefs will be designed to drive the organisation forward for the future.

*“A key thing for us creating a programme in-house is that they can be specific to us and to our environment...you have written it around what your organisational needs are.” (Interviewee G).*

Three further secondary codes relating to contextualisation were also identified with lower frequencies of mention. These included contextualisation of content (F1, 3 occurrences), contextualisation of assignments (F2, 2 occurrences) and contextualisation of projects (F3, 2 occurrences)

#### **5.1.1.7. Collective Learning**

The primary code “collective learning” (G) gained the seventh highest coding frequency of 37 occurrences. Four aspects of collective learning are involved. The first is the development of team building within the student group. The second involves the dissemination of knowledge from the students to their respective departments within the organisation. The third involves the opportunity to network within the organisation and learn from those at more senior level. The fourth involves the breaking down of silos within the organisation.

An important aspect of collective learning is the potential for team-building (G1, 11 occurrences). A corporate education course includes participants from the same company and provides opportunities for working together on group projects and developing high performance teams from across the spectrum of the organisation. This approach breaks down silo mentalities and fosters integrated thinking and innovative ideas.

*“My expectation was communication and team-work.....every year we had a final project and I learned that it is extremely important to have specific roles within a team and to identify which skills people have” (Interviewee I).*

Working in teams also provides a support network which is invaluable to the learning process. Many of the course participants are experts within their chosen field within the company but feel like novices when encountering academic work. In many cases they have been out of education for a long time and value the support of others who are facing the same situation.

*“With the corporate programme, there is a support network there, not only are they colleagues, but also friends.....you have a support network behind you which I am not sure you would have on an open programme. I found that support network invaluable” (Interviewee E).*

The friendships developed on the course provide not only practical support from a network of colleagues who one can turn to when needing advice, but also the emotional support of knowing that others are encountering the same challenges and facing the same fears.

A further benefit of the collective learning approach is the opportunity for dissemination of knowledge (G4, 8 occurrences). Ideas and concepts from the course are not only discussed between the participants within the learning environment but also with other colleagues within the workplace. In this respect the wider organisation becomes a learning context in which the course material is disseminated and shared throughout the workforce, creating maximum value from the investment.

*“I also wanted to share my knowledge with others, particularly from lecturers who have more experience” (Interviewee H).*

*“My thoughts and ideas will be implemented across the Group” (Interviewee K).*

Two further secondary codes were also identified related to collective learning with lower frequencies of mention. These included the breaking of silos (G2, 3 occurrences) and networking (G3, 4 occurrences).

#### **5.1.1.8. Partnership**

Partnership (36 occurrences) between the corporate organisation and the university is also seen as an important expectation of corporate education. Four aspects of partnership are seen to be important: (a) co-design, whereby the corporate organisation co-creates the course design in partnership with the university, (b) co-delivery, whereby the corporate organisation delivers a proportion of the course content alongside university teaching staff, (c) co-learning, whereby both the corporate organisation and the university learn from the experience of working together. The L and D team gain knowledge of academic processes and procedures whilst the university staff members gain knowledge of contemporary issues within business & management from the organisation. Finally, (d) co-ownership, whereby the organisation feels a strong sense of ownership of the course alongside the university.

Co-design (H1, 11 occurrences) is based on the principle that the two parties, namely the organisation and the university, can create a more effective course design together than by themselves. The university can provide the theoretical concepts and the structure of the course. The organisation can ensure that the material is relevant to the participants and can be contextualised to the sector.

*“...an expectation that we can work together to produce something that is positive – the university and the health service and to come together to create something that is meaningful to both parties” (Interviewee B).*

Co-learning (H3, 7 occurrences) recognises that learning is a two-way process. It does not consist only of the university passing on knowledge to the organisation. The organisation will also transfer a good level of knowledge to the university in terms of information about current business processes and

the industry environment. Both parties can also learn from the creation of a learning and teaching strategy together.

*“Partnership working with the university was important..... working in partnership gave us the opportunity to gain the theoretical knowledge, but the university could also learn about the business and the knowledge that we had” (Interviewee A).*

*“For us it was about the shared learning” (Interviewee F).*

Co-ownership (H4, 4 occurrences) involves the development of a sense of ownership together. In most cases the university owns the intellectual property rights to the teaching material, but the organisation often internalises the course as belonging to them. It is common for the course to be entitled ‘the [company] MBA’ or a similar title demonstrating a sense of ownership by the organisation.

*“The notion of ownership and partnership was important” (Interviewee B).*

*“We are co-creating the content...it is the [luxury retail company] programme, not someone else’s programme” (Interview G).*

Co-delivery (H2, 4 occurrences) may include guest lecturers from within the organisation being involved in the delivery. Often academic staff members provide the more theoretical content which is followed by organisational staff members who contextualise the theory to practice.

*“The buy-in to bring them [senior managers] in as guest speakers at the 3-day blocks is difficult, but for those that do it, they do a great job” (Interviewee C).*

In some cases organisational staff members may be signed up as associate staff with the university and deliver whole modules. This often requires some training to ensure that the teaching is kept at the right academic level.

*“For us it was about the shared learning and the opportunity to co-deliver the training, based around our Sales Academy” (Interviewee F).*

#### **5.1.1.9. Summary**

In summary, the thematic analysis identified eight primary codes and forty-one secondary codes. These codes formed the basis for the survey questionnaire at stage two of the research process. However, it was recognised that eight primary codes and forty-one secondary codes, when translated into dimensions and statements on the survey questionnaire, could make completing the questionnaire highly time consuming, especially for busy executives in contemporary business organisations. It was therefore decided, in line with the pragmatic paradigm adopted by the research process in this study and in line with criticisms of long questionnaires from the literature review, to cut the number of dimensions to seven by integrating the codes from contextualisation into the university support dimension. Contextualisation is one aspect of the role played by university lecturing staff in providing excellent service quality. A more detailed explanation of the thinking behind this decision can be found in the coding inclusion rationale in appendix 12. The final outcome of seven dimensions and thirty statements which were utilised in the corporate education survey questionnaire at stage two of the research process are outlined in detail in section 5.2.1 below.

#### **5.1.2. Specific Question Analysis**

In addition to the thematic analysis, questions 2, 3, 12, 13, 14 and 16 were designed to be of a more specific nature, and as such were analysed question by question.

## Questions 2 and 3 – The distinction between corporate and open education programmes

Corporate education courses are characterised by a high level of contextualisation to the organisation or sector whereas the focus of open education programmes is more general in nature. In corporate education at the design stage the learning and development team along with academic staff from the university can ensure that topics chosen are relevant to the organisation and that the content is applied to the workplace.

*“In a corporate programme we could tailor-make it to our own business” (Interviewee A).*

*“A bespoke programme might get 50-60% of the material related to {insurance company} rather than 20% from an open programme” (Interviewee C).*

The bespoke nature of corporate education increases the level of engagement felt by the organisation and the level of control that it can exercise over the learning process.

*“As a business you would feel less engaged on an open programme. You get very little insight into the organisation and what they are doing. In the partnership approach we have fitted the programme to our needs” (Interviewee F).*

*“My expectation would be more control over what the programme was about. And that would be chief, because looking at a prospectus you never get a clear idea of what it is about” (Interviewee B).*

A higher level of engagement ensures that the organisation pours more resources into supporting the programme,



*“I think our expectations would be higher because, having tailored the programme to us we were making sure we had the support mechanisms internally. I am not sure we would have done that if it had been an open programme” (Interviewee J).*

Corporate education requires different pedagogical approaches to open education. The learning and teaching strategy may include practical projects, action learning, mentoring and assignments which are tailored to organisational needs.

*“We wanted to get something out of it in terms of the projects that they completed and I am not sure we would have done this with an open programme” (Interviewee J).*

*“Our expectation was to have an MA which is work-based and involved flexible learning, such as the action learning” (Interviewee A).*

A positive feature of a corporate education course is that the organisation may gain from cost savings if they can agree a positive deal with the university for a bespoke student cohort,

*“Also a great incentive was the cost being paid for by the company. University course fees have skyrocketed and doing this course linked to work was ideal” (Interviewee H).*

However, it is recognised that there are negative features of a bespoke approach. Participants may lose out by failing to gain experience from other industry sectors,

*“The only thing missing was interaction with other organisations and networking with other organisations, which we did miss” (Interviewee J).*

At the individual level participants have the opportunity to relate the material to their own work situation. They can critically reflect on their own leadership and management skills, evaluate current issues within the organisation and create solutions which will improve performance within the organisation.

*“...so my expectation is that in a corporate programme I can study something really relevant, specifically in Sales in this case. Everything is based on the day to day activity within the company (Interviewee I).*

Participants also feel a greater sense of responsibility for achieving academic success. They recognise that the organisation has paid for the course and has invested a considerable amount of time and energy to make it a success. They often have a strong sense of wanting to succeed and of not wanting to let the company down. They also face the pressure of ‘competing’ with other colleagues on the course and the expectations of senior managers who expect them to do well.

*“The worst thing when you are sponsored by a company is if you failed in any way and let people down whereas if you are on an open programme anything can happen and you are only letting yourself down” (Interviewee E).*

In conclusion, it is clear that real differences exist between corporate and open education programmes. They are tailored to one organisation or sector. They have a different pedagogical approach and a higher level of engagement in the learning and teaching process.

#### Question 12 – Expectation levels

Question twelve focused on the level of expectations felt by the various stakeholder groups and whether their expectations were realistic or unrealistic. Responses to this question varied, although eight out of eleven respondents felt that their expectations were realistic. The eight respondents

comprised a mix of stakeholder groups, including students on the programme, L&D managers, line managers and senior managers.

Students on the programme (interviewees A, E and H), stated that they had unrealistic expectations. Some unrealistic expectations related to the amount of work involved in setting up the programme and in completing the programme,

*“The unrealistic part was in terms of the time it would take to bring the programme about, and the vision we had of having a portfolio of learning that everyone could buy into. We were unrealistic or naïve about whether the organisation was ready for it” (Interviewee A).*

*“I didn’t realise quite how much I would have to do....I guess I underestimated the amount of work involved....I set my expectations too low on that perspective” (Interviewee E)*

Other unrealistic expectations related to the belief that completing the course would lead to promotional opportunities. These expectations were not realised.

*“I thought it would take us to a different position or role within the organisation. I believe this was true for all members of the team. I later realised that this sort of thing may not happen” (Interviewee H).*

*“My expectation now I have finished the MBA is that there would be something that would come out of it. Some sort of monetary reward or promotion or job recognition, which there hasn’t been” (Interviewee E).*

### Question 13 - Expectation differences between stakeholder groups

Question thirteen asked respondents whether expectations differed from one stakeholder group to another. The responses demonstrated that stakeholder groups do display different expectations from one another. Students on the

programme had expectations which were primarily personal in nature relating to their own learning, their motivation and future career development.

*“Students’ expectations were that I would learn something and put it into practice and help the organisation to go forward” (Interviewee A).*

*“My expectation now I have finished the MBA is that there would be something that would come out of it. Some sort of monetary reward or promotion or job recognition” (Interviewee E).*

*“I view it as a great personal experience and it has given me more enthusiasm and motivation at work” (Interviewee H).*

Senior managers have expectations which are more strategic in nature. They expect a corporate education programme to assist in achieving organisational goals, creating greater financial return, achieving better business results, creating a talent pool for the future and disseminating knowledge throughout the company.

*“The senior stakeholders thought more strategically and wanted the programme to achieve organisational goals. Their expectations were at a higher level of outcome” (Interviewee A).*

*“Senior management want the course to take place but they don’t know what they want from it and what the aim is. They want some kind of financial return” (Interviewee K).*

*“Senior staff want better business results and this can be achieved through their people” (Interviewee G).*

Line managers have expectations which are aimed at progress in the development of their direct reports. They expect to see changes in their subordinates’ behaviour, attitudes and performance.

*“Line managers might have been looking for performance changes” (Interviewee B).*

*“A line manager would like me to improve my sales and make the team environment better” (Interviewee I).*

Learning and development managers have expectations which are aimed at development of a successful programme and the development of successful individuals.

*“My expectations [as L and D manager] were different because we are measured on the success of people getting through the course” (Interviewee C).*

*“L and D are happy developing people and to deliver something to the business” (Interviewee I).*

*“I see the benefits of publicity. I see the stories you can tell inside the company and how people have this amazing opportunity” (Interviewee F).*

The different stakeholder expectations are summarised in table 23.

Stakeholder Group	Expectations
Students	Learn and put into practice
	Career development and monetary reward
	Greater enthusiasm and motivation at work
Senior Managers	Achievement of organisational goals
	Financial return
	Better business results
	Succession planning & future talent pool
Line Managers Learning and Development	Dissemination of knowledge throughout the company
	Improved behaviour, attitudes and performance
	Student success
	Creation of an effective learning programme
	Publicity potential
	Talent development

Table 23: Stakeholder Expectations

Whilst there are differences between the expectations of different stakeholder groups, it is recognised that there is some alignment between them.

*“Maybe all the stakeholder groups are coming at the same thing from different angles. Students want to better themselves and the end product is better business results. In the middle are ‘results’ (Interviewee G).*

*“L and D was looking for development of talent etc. Senior managers were looking for the same. L and D and the senior team were quite aligned in what they were looking for” (Interviewee J).*

#### Question 14 – Stakeholder level of importance

Question fourteen focused on the importance of stakeholder group expectations. The overall results demonstrate that students on the programme and senior management are seen as the most important stakeholders whose expectations are most important. Six respondents believed that students on the programme were the most important stakeholder. Seven respondents believed that senior managers are the most important stakeholder. Only two respondents mentioned that L&D managers are the most important stakeholder, despite the fact that this group comprise the architects of the corporate education experience.

Senior managers are seen as important since they allocate resources, they pay the salaries and they allocate time to make the programme work.

*“The expectations of the senior managers are paramount because they pay our salary” (Interviewee B).*

*“The immediate answer would be the senior team, because they are supporting students, giving them the time and paying for the course so we want to see a return” (Interviewee J).*

Equally students on the programme are seen as important, since they make sacrifices to attend the course, they are the future advocates of the programme.

*“I believe the delegate. They are the ones setting themselves up for sacrifice away from the family. They are being prepared for leadership in the future. Business can’t succeed without the people” (Interviewee C).*

*“Student expectations are the most important. They are the ones who will carry the torch forward” (Interviewee K).*

The expectations of learning and development staff are seen as less important but nonetheless play an important role,

*“As L and D people we have the juggling act of making sure that every stakeholder level’s expectations are met. If one isn’t met, then the others aren’t met” (Interviewee G).*

*“It has to be L and D. All the responsibility rests on their shoulders. They have got to make it a success” (Interviewee H).*

#### Question 16 – Return on investment vs. return on expectations

Question 16 focused on the distinction between return on investment and return on expectations and asked about the relative merits of each approach. Return on expectations is seen by most respondents as a useful concept. One of the key benefits is that it brings a more qualitative perspective to evaluation.

*“Return on expectations looks at things from a qualitative perspective – what people are believing, feeling, and experience. It is real life rather than just numbers. Numbers don’t tell you anything. Return on expectations has more meaning to it. It adds to and supplements the*

*return on investment perspective. Return on investment is hard to measure from people's perspective, but return on expectations looks at what actually goes on – what is culture, what are the problems, what makes people tick. It delves deeper – tells you the truth about what is happening. I like the concept of return on expectations” (Interviewee C).*

*“I think it is a good way to show that it is not only about figures. It is also about emotional intelligence and to understand the big picture. Expectations are a group of different things that people are thinking they would like to see. Return on investment, at the end of the day is about what I invest and spend and how much money I got back. But you cannot measure quality, you cannot measure service, you can't measure the development of individuals” (Interviewee I).*

*“I think it's a spectacular idea – you've really got something here. As soon as I heard about it I thought “yes absolutely”. It is a much more difficult thing to grasp. There are lots of things driving the need to quantify something. But what do you get from things that don't make you money. What do you get from x16 motivated staff and the ripples of goodwill that emanate from that?” (Interviewee K).*

A second reason why return on expectations is seen as a useful concept relates to the simple nature of expectations and the benefits of seeing issues from the perspective of different stakeholder groups,

*“Return on expectations might be simpler and more straightforward for the individual stakeholders to consider and rationalise their thoughts at the beginning, middle and end of the programme. Return is a difficult concept to get your arms around and over the years return on investment has been difficult to quantify. Return on expectations is altogether more straightforward, more meaningful” (Interviewee D).*



*“So, setting expectations at the beginning is interesting. Yes, I could see that. It does help you to see the views of the different stakeholders” (Interviewee J).*

Several respondents recognise the limitations of return on investment,

*“To demonstrate a return on investment is quite hard if you are looking at it in monetary terms” (Interviewee A).*

*“Numbers don’t tell you anything....return on investment is hard to measure from people’s perspective” (Interviewee C).*

*“Return is a difficult concept to get your arms around and over the years return on investment has been difficult to quantify” (interviewee D).*

*“Return on investment doesn’t work. Trying to spend hours measuring it with the HR Director in the past was difficult. It took ages and it was impossible. You can’t easily put a figure on things” (Interviewee F).*

Despite these negative comments relating to return on investment, some respondents especially senior managers, recognise its importance.

*“Being in L and D for years, return on investment is something that we always look at. You know, I am spending all that money, what it is going to add to the bottom line. That is a fairly traditional way of looking at any training programme within an organisation” (Interviewee J).*

*“But shareholders will always look for return on investment. But return on expectations is a useful perspective” (Interviewee C).*

Some respondents recognise that return on expectations and return on investment are not mutually exclusive but can provide a synthesis of useful perspectives in the evaluation process,

*“Maybe we need both return on expectations and return on investment evaluation. The balance in the past has been towards return on investment but maybe this needs to be redressed by more emphasis on return on expectations. Maybe we should have a generic name ‘return’. Some programmes may be better evaluated by return on expectations and some by return on investment” (Interviewee B).*

*“It is a combination of both return on investment and return on expectations. Return on investment doesn’t work. It has been difficult spending hours trying to measure it with the HR Director in the past. It took ages and it was impossible. You can’t easily put a figure on things. But we can say that something made an improvement. But it is a waste of time to try to put a figure on that. But we do need hard facts. The idea of expectations sounds quite fluffy” (Interviewee F).*

*“I wonder if they are two sides of the same thing, but it does force you to look at return on investment in a different way” (Interviewee G).*

## **5.2. Stage Two Questionnaire Survey**

The findings of the interviews at stage one, as evidenced above, revealed that the original SERVQUAL questionnaire would not be suitable as a basis for stage two of the research. Whilst SERVQUAL would undoubtedly be a major design influence in the construction of the questionnaire, it would not be fit for purpose in its original form in the case of this research study. Equally HEdPERF, although derived from the higher education sector, would not be fit for purpose either. Expectations and perceptions of service quality in corporate education are of a different nature to those for open education. The contrast between the original SERVQUAL and HEdPERF dimensions and the dimensions utilised in this research study are outlined in tables 24-26 below.

DIMENSION	DEFINITION
TANGIBLES	Physical facilities, equipment and appearance of personnel
RELIABILITY	Ability to perform the promised service dependably and accurately
RESPONSIVENESS	Willingness to help customers and provide prompt service
ASSURANCE	Knowledge and courtesy of employees and their ability to inspire trust and confidence
EMPATHY	Caring, individualised attention the firm provides its customers

Table 24: SERVQUAL Quality Dimensions (Parasaruman et al., 1988)

DIMENSION	DEFINITION
NON-ACADEMIC ASPECTS	Duties carried out by non-academic staff that are essential to help students fulfil their study obligations, such as respect, equality of treatment, confidentiality, good communication.
ACADEMIC ASPECTS	Responsibilities carried out by academic staff, such as positive attitudes, regular feedback to students, a good reputation as an institution, degrees which are recognised internationally, educated and experienced academic staff
REPUTATION	The importance of educational institutions projecting a professional image
ACCESS	Issues such as approachability, ease of contact, availability and convenience
PROGRAMME ISSUES	Wide ranging and reputable programmes with flexible structure and syllabus
UNDERSTANDING	Understanding the specific needs of students

Table 25 : HEdPERF Quality Dimensions (Firdaus, 2006c)

DIMENSION	DEFINITION
UNIVERSITY SUPPORT	Support provided by academic staff, such as providing knowledge relevant to students' work, providing regular feedback on student progress and contextualising their material to the organisation and its sector
ORGANISATIONAL SUPPORT	Support provided by the corporate organisation such as providing sufficient time for academic study, providing regular 1:1 reviews on progress and providing feedback on assignments
RETURN ON INVESTMENT	Return on investment for the individual student and for the wider organisation
CAREER DEVELOPMENT	Career progression for the individual student and enhanced succession planning for the organisation
CREDIBILITY	Reputation within the organisation and its sector
COLLECTIVE LEARNING	Opportunities for team-building, networking and learning from one another, plus wider organisational learning
PARTNERSHIP	Opportunities for co-design, co-delivery and co-ownership between the university and the organisation

Table 26: Corporate Education Quality Dimensions (this research study)

The aim was therefore to allow the qualitative data gathered in stage one of the research to speak for itself and to form the basis for a new questionnaire that would be more relevant to corporate education. The primary and secondary codes gained from the initial interviews were translated into statements which formed the basis for the questionnaire (appendix 14).

The results from the stage two survey questionnaire were analysed by means of two main approaches. The first involved descriptive statistical analysis aimed at presenting the questionnaire results through the use of weighted averages. The second involved inferential statistical analysis aimed at establishing the validity of the questionnaire instrument and at investigating correlations between different variables.

### **5.2.1. Descriptive Statistical Analysis**

The overall questionnaire survey results for all four organisations are outlined below, question by question. Specific results for each individual organisation are outlined in appendices 16-19. Weighted averages for expectations (E), perceptions (P) and gap scores were derived through the application of the traditional weighted average calculation. As an example the E-score for 8a was calculated as follows:

0 (percentage response) x 1 (likert weighting) = 0  
10 (percentage response) x 2 (likert weighting) = 20  
2 (percentage response) x 3 (likert weighting) = 6  
40 (percentage response) x 4 (likert weighting) = 160  
48 (percentage response) x 5 (likert weighting) = 240    Total = 426    Divide by 100 = 4.26

**Table 27a: Expectations and Perceptions of Corporate Education – Overall Results**

Survey Question	E	P	Gap	Imp
Organisational Support				
Q9a Senior staff members within the organisation should provide support to students	4.58	3.23	1.35	1
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.40	3.11	1.29	
Q9c Line managers should provide sufficient time for academic study	4.48	3.24	1.24	
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.12	2.17	1.95	
Q9e Line Managers should provide feedback on assignments	3.52	2.11	1.41	
University Support				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.26	3.91	0.35	2=
Q8b Academic staff from the university should be experts in their field of study	4.60	4.14	0.46	
Q8c Academic staff from the university should provide regular feedback on student progress	4.62	3.47	1.15	
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.32	3.75	0.57	
Q8e Academic staff members from the university should assist students in applying theory to practice	4.46	3.63	0.83	
Return on Investment				
Q10a The course should provide return on investment for the organisation	4.48	3.60	0.88	2=
Q10b The course should provide tangible outcomes from assignments or projects	4.22	3.48	0.74	
Q10c The course should improve student performance within the organisation	4.56	3.92	0.64	
Q10d The course should improve student motivation within the organisation	4.48	3.72	0.76	
Career Development				
Q11a The course should enhance students' careers	4.50	3.22	1.28	4
Q11b The course should create a new talent pool within the organisation	4.52	3.34	1.18	
Q11c The course should improve succession planning within the organisation	4.48	2.90	1.58	
Q11d The course should require careful selection of participants	4.62	2.90	1.72	
Collective Learning				
Q13a The course should enable students to learn from one another	4.58	4.16	0.42	5
Q13b The course should foster team-building within the student group	4.60	4.30	0.30	
Q13c The course should provide opportunities for networking within the organisation	4.56	3.96	0.60	
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.40	3.72	0.68	

Survey Question	E	P	Gap	Imp
Credibility				
Q12a The course should increasingly gain credibility within the organisation	4.50	3.32	1.18	6
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.36	3.16	1.20	
Q12c The course should have high academic credibility within the education sector	4.40	3.34	1.06	
Q12d Students should achieve good academic success	4.26	4.04	0.22	
Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.28	3.60	0.68	7
Q14b The university and the organisation should both be involved in the course design	4.40	3.78	0.62	
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.44	3.70	0.74	
Q14d The university and the organisation should both feel a sense of ownership of the course	4.44	3.60	0.84	

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas of greatest concern)

**Table 27b: Importance (rankings based on top 3 responses, as expressed by percentage)**

Dimension	Percentage	Rank
Organisational support	74%	1
University support	66%	2=
Return on investment	66%	2=
Career development	56%	4
Collective learning	54%	5
Credibility	46%	6
Partnership	30%	7

**Table 27c: Overall Satisfaction**

Weighted Average	Percentage Satisfied
3.88	78%

**Table 27d: Biographical Data**

Gender		
Male	48%	Comment: a fairly even split between male and female with a marginal emphasis on female
Female	52%	
Age Bracket		
18-30	18%	Comment: the majority of respondents fall within the 31-50 and 41-50 brackets
31-40	38%	
41-50	36%	
51-60	8%	
61+	0%	
Sector		
Luxury retail	26%	Comment: A reasonable spread from the four participating organisations with a higher number from the insurance sector.
Insurance	36%	
Builders Merchants	18%	
NHS	20%	
Stakeholder		
Student	50%	Comment: The highest group of respondents comprise students on the programme. Line and senior managers taken together are also well represented. L&D representation is low.
L&D manager	6%	
Line manager	26%	
Senior manager	18%	
Qualification		
None	42%	Comment: A mixed set of results. The highest group of respondents have no HE qualification. A reasonable percentage of respondents have either an undergraduate or postgraduate qualification.
Undergraduate	32%	
Postgraduate	26%	
Length of Tenure		
<1 year	2%	Comment: The majority of respondents have worked for their organisation for more than six years.
1-3 years	16%	
4-5 years	12%	
6+ years	70%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for more than one year.
7-12 months	8%	
13-24 months	32%	
25-36 months	14%	
N/A	46%	

### **5.2.1.1. Expectation and Perception Gaps**

It is clear from table 27a (which relates to the overall results from all four organisations) that three dimensions in particular present areas of greatest concern with gap scores of above 1.00. These include organisational support where all five items have high gap scores ranging from 1.24 to 1.95, career development where all four items have high gap scores ranging from 1.18 to 1.72 and credibility where three items have high gap scores ranging from 1.06 to 1.20. Item 8c, relating to feedback from university staff is also an area of concern at 1.15.

A similar pattern is evident in the results for each individual organisation, with minor variations in each case. In the case of the luxury retail organisation, organisational support presents high gap scores in relation to line manager support ranging from 1.29 to 1.61. Career development presents high gap scores ranging from 1.07 to 1.69. Credibility only has one high gap score of 1.15. University support also has two high gap scores ranging from 1.23 to 1.38. In the case of this organisation return on investment is also flagged up as an area of concern with gap scores ranging from 1.00 to 1.09. The full set of results for the luxury retail organisation can be found in appendix 16.

In the case of the insurance company, organisational support presents two high gap scores in relation to line manager support ranging from 1.22 to 1.76. Career development presents four high gap scores ranging from 1.05 to 1.88. Credibility only has one high gap score of 1.12. University support interestingly has no high gap scores above 1.00. The full set of results for the insurance company can be found in appendix 17.

In the case of the builder's merchant organisation, organisational support presents five high gap scores in relation to line manager support ranging from 1.11 to 2.12. Career development presents three high gap scores ranging from 1.11 to 1.34. Credibility interestingly has low gap scores overall with a minus gap score of 0.11 relating to academic success 12d, which is the only case of perceptions exceeding expectations in the entire research study.



University support also has three high gap scores ranging from 1.22 to 2.23. In the case of this organisation one item in the partnership dimension is flagged up as an area of concern with a gap score of 1.00. The full set of results for the builder's merchant organisation can be found in appendix 18.

In the case of the NHS hospital, organisational support presents five very high gap scores ranging from 1.90 to 2.60. Career development presents high gap scores ranging from 1.20 to 2.10. Credibility has three high gap scores ranging from 1.30 to 2.10. University support interestingly has no high gap scores above 1.00. In the case of this organisation return on investment is also flagged up as an area of concern with gap scores ranging from 1.10 to 1.60. Partnership also has two high gap scores ranging from 1.30 to 1.60. The full set of results for the NHS hospital can be found in appendix 19.

In summary, the obvious areas of concern relate to organisational support, career development and credibility. University support and return on investment are also seen as areas of concern by some organisations. It is these dimensions which require further discussion within the stage three interviews.

Three of these areas of concern were supported by the free-form comments in questions 24 and 25 of the survey questionnaire, which asked whether respondents had any further comments they would like to make regarding either expectations or perceptions. Nine respondents commented on the need for better university support including the need for a greater level of feedback on assignments and better contextualisation of teaching material to the organisation.

*“Course feedback is poor, late and inconsistent. Contacting tutors is futile, rarely get a reply”.*

*“There was a lack of professional examples from the university staff during the workshops. University staff should be prepared for*

*workshops, not to do it spontaneous. And make sure examples are related to the course, not to their personal experiences”.*

Seven respondents commented on their frustrations regarding career development.

*“A follow up from the organisation is required to assess how the new graduates are developing their careers at work”.*

*“The course should have given the students a solid platform from where the next steps of their careers could be taken from. However this has not been the case for many of the students who have graduated. The organisation did not support them”.*

Five respondents commented on their frustrations regarding organisational support.

*“Lack of engagement from senior Trust Management throughout course and beyond is a key de-motivator. There are considerable numbers of leadership / transformation projects currently running and yet very few, if any, MA leadership graduates have been actively approached to participate in them”.*

*“Managers in the organisation at all levels need to take more interest in what is being taught and its relevance to the organisation. Mentorship support was very limited, i.e. mentor too busy studying themselves. Getting time to meet only occurred twice. After the course on-going interest in student development was non-existent. My manager showed no interest at all when I talked about my studies, and only asked me once independently how I was doing. When I asked for advice from some of my directorate team I could not get any”.*

### **5.2.1.2. Ranking of Dimensions**

It is clear from table 27b that the dimensions viewed as having higher priority were organisational support (rank 1) university support (rank 2=), return on investment (rank 2=) and career development (rank 4). The dimensions viewed as having lower priority included collective learning (rank 5), credibility (rank 6) and partnership (rank 7).

A similar pattern is evident in the results for each individual organisation, although collective learning is also ranked high in some cases. In the case of the luxury retail organisation, the highest rankings included return on investment (ranked 1=), career development (ranked 1=), organisational support (ranked 3) and university support (ranked 4). The results for the insurance company were organisational support (rank 1), university support (rank 2=), collective learning (rank 2=), return on investment (rank 4=) and career development (rank 4=). The results for the NHS hospital were organisational support (rank 1), return on investment (rank 2), university support (rank 3) and collective learning (rank 4). The results for the builders merchant organisation were organisational support (rank 1=), university support (rank 1=), career development (rank 3), and collective learning (rank 4). The full set of results for each individual organisation can be found in appendices 16-19.

### **5.2.1.3. Overall Satisfaction**

The overall satisfaction question was a stand-alone question which was aimed at obtaining a summary view of service quality satisfaction. The result for all four organisations was 78% (table 27c). However, the results for each individual organisation varied considerably. The insurance company score was 94% satisfied, the NHS hospital 90% satisfied, the luxury retail company 69% satisfied and the builders merchant organisation 56% satisfied. The intriguing issue here related to the fact that in a couple of instances the detailed gap score results for the questionnaire dimensions did not appear to tally with the overall satisfaction results. Thus, the NHS hospital had a high

overall satisfaction score but had high gap scores for a number of particular dimensions. Conversely, the luxury retail organisation had a relatively low overall satisfaction score but lower gap scores for particular dimensions. This apparent contradiction is an issue that is taken up later in the stage three interviews.

#### **5.2.1.4. Stakeholder Analysis**

One of the research questions for this research study related to whether the results indicated a difference between stakeholder groups. Consequently, a stakeholder analysis was implemented, which is outlined in appendices 20-21. The stakeholder analysis was completed for all four organisations rather than for each organisation individually. The stakeholder analysis was divided into two main groups, students on the programme and more senior stakeholders (which included learning and development managers, line managers and senior managers). A decision was made to put the latter three stakeholder groups together as each of these groups would not be sufficient for an effective comparison to be made. Also, a reasonable degree of commonality existed between senior stakeholders for the purpose of analysis.

The results demonstrated that the expectations and perceptions of the two main stakeholder groups do not differ from one another. The analysis from both stakeholder groups indicated that organisational support and career development were areas of concern with several gap scores above 1.00. Additionally, one item of university support, 8c relating to academic staff feedback also had a gap score of above 1.00 in both cases. Some minor variations did exist between the two stakeholder groups, however. The gap scores for the student stakeholder group were higher in some cases than the scores for the senior stakeholder group. For example, in the organisational support dimension the mean score for the student stakeholder group was 1.69 whereas the mean score for the senior stakeholder group was 1.08. Likewise, in the career development dimension the mean score for the student stakeholder group was 1.50 whereas the mean score for the senior stakeholder group was 1.36. One dimension in which the two stakeholder

groups also differed related to the credibility dimension. The student stakeholder group indicated that this was an area of concern, with three high gap scores above 1.00. The senior stakeholder group indicated that this was not such an area of concern with all gap scores just under 1.00.

## 5.2.2. Inferential Statistical Analysis

### 5.2.2.1. Confirmatory Factor Analysis

The first inferential statistical analysis conducted involved a confirmatory factor analysis. Factor analysis is utilised to understand the structure of a set of variables and to reduce a set of data to a more manageable size (Field (2013, p666)). The full analysis can be found in appendix 23 and key aspects of the analysis are outlined in table 28a, b and c below.

KMO and Bartlett's Test		
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.634
Approx. Chi-Square		1017.297
Bartlett's Test of Sphericity	df	435
	Sig.	.000

Table 28a: KMO and Bartlett Test

Communalities		
	Initial	Extraction
8a Staff Knowledge	1.000	.702
8b Staff Expertise	1.000	.747
8c Staff Feedback	1.000	.754
8d Staff Contextualise	1.000	.743
8e Staff Theory Practice	1.000	.730
9a Org Staff Support	1.000	.850
9b Org Staff Connections	1.000	.881
9c Org Staff Study Time	1.000	.766
9d Org Staff 1:1s	1.000	.712
9e Org Staff Feedback	1.000	.751
10a ROI	1.000	.849
10b ROI Outcomes Projects	1.000	.872
10c ROI Student Performance	1.000	.674
10d ROI Student Motivation	1.000	.679
11a CD Improve Careers	1.000	.819
11b CD Talent Pool	1.000	.811
11c CD Succession	1.000	.847
11d CD Selection	1.000	.836
12a CR Credibility	1.000	.858
12b CR Cred Sector	1.000	.875
12c CR Cred Ed Sector	1.000	.765
12d CR Acad Success	1.000	.835
13a CL Learning	1.000	.888
13b CL Team	1.000	.817
13c CL Networking	1.000	.874
13d CL Benefit Others	1.000	.831
14a PT Partnership	1.000	.762
14b PT Course Design	1.000	.841
14c PT Delivery	1.000	.841
14d PT Ownership	1.000	.822

Table 28b: Communalities

Rotated Component Matrix

	Component									
	1	2	3	4	5	6	7	8	9	10
14b PT Course Design	.857									
14c PT Delivery	.845									
14d PT Ownership	.756									
14a PT Partnership	.631									
11a CD Improve Careers		.837								
11c CD Succession		.829								
11b CD Talent Pool		.796								
13d CL Benefit Others			.827							
13c CL Networking			.662							
12b CR Cred Sector				.776						
12a CR Credibility				.755						
11d CD Selection				.728						
10b ROI Outcomes Projects					.877					
10a ROI					.688					
10d ROI Student Motivation					.499					
9e Org Staff Feedback						.669				
9d Org Staff 1:1s						.654				
9b Org Staff Connections							.802			
9a Org Staff Support							.660			
8c Staff Feedback							.654			
13a CL Learning								.909		

13b CL Team								.740		
9c Org Staff Study Time									.793	
8e Staff Theory Practice										.779
8d Staff Contextualise										.622

Table 28c: Rotated Component Matrix



Many writers argue that a stable factor solution requires a sample size of 300 or more respondents. Clearly, in the case of this research study, the sample was much smaller with only 50 respondents. However, as Field (2013, p684) articulates, whilst 300 or more respondents is an ideal sample size, the picture is more complicated than that. A smaller sample size may still be reliable. Other writers agree with this view and propose a number of criteria for the utilisation of factor analysis within a small sample size. The first relates to the communality of the variables. MacCallam et al. (1999) state that if communalities are high, recovery of population factors in sample data is normally very good. Communalities should all be greater than .6. In the case of this research, the communalities are reasonably high, with scores which are all above .6. Secondly, the KMO results should lie above the .5 threshold of acceptability. The KMO test in this research study presents a score of .634. This falls into what Field (2013, p685), citing Hutcheson and Sofroniou (1999) terms acceptable and well above the .5 threshold of acceptability. Thirdly, a minimum of three variables per factor is important (Velicer & Fava, 1998, p243). In the case of this research five out of the ten factors had a minimum of three variables per factor. The fourth criteria relates to the size of loading. Velicer and Fava (1998, p244) state that the sample to population pattern fit is very good for the high (.80) loading condition, moderate for the middle (.60) loading condition and very poor for the low (.40) loading condition. In the case of this research eight variables lie above the .80 threshold and all remaining seventeen variables lie above the .60 threshold. Of these eight variables lie above .70.

The rotated component matrix included a varimax rotation to improve the interpretability of factors. Alternative rotations such as oblimin were attempted but the pattern did not alter significantly. To ensure a strong relationship between attributes and dimensions only those attributes with factor loadings of  $\pm 0.5$  were included within the analysis. Previous factor analysis studies have utilised cut-off levels of either  $\pm 0.3$  or  $\pm 0.5$ . Using the cut-off level of  $\pm 0.5$ , ten dimensions of service quality were identified and are considered below in descending order of magnitude.

Dimension One: four attributes (14a, b, c and d) loaded onto dimension one and formed an excellent match with the dimension 'partnership' which was derived from stage one interview coding analysis.

Dimension Two: three attributes (11a, b and c) loaded onto dimension two and formed a good match with the dimension 'career development' which was derived from stage one interview coding analysis.

Dimension Three: two attributes (13c and d) loaded onto dimension two and formed a partial match with the dimension 'collective learning' which was derived from stage one interview coding analysis. These two attributes appear to focus on 'organisational learning'.

Dimension Four: three attributes (12a, b and 11d) loaded onto dimension five and formed a partial match with the dimension 'credibility' which had been derived from stage one interview coding analysis. The inclusion of attribute 11d here may indicate that the credibility of those selected for the corporate education programme is also an important factor.

Dimension Five: three attributes (10a, b and d) loaded onto dimension five and formed a good match with the dimension 'return on investment' which had been derived from stage one interview coding analysis. Attribute 10d was included as it was only .001 below the specified cut-off level.

Dimension Six: two attributes (9d and e) loaded onto dimension six. These attributes appear to focus on 'organisational feedback'.

Dimension Seven: two attributes (9a and b) loaded onto dimension seven. These attributes appear to focus on organisational support, although 8c university staff feedback seems to be an anomaly here.

Dimension Eight: two attributes (13a and b) loaded onto dimension eight and also formed a partial match with the dimension 'collective learning'. These two attributes appear to focus on 'team learning'. The division of the original

‘collective learning’ identified within the stage one interviews into two dimensions (three and eight) within the factor analysis clearly makes a distinction between learning at the wider organisational level and learning at the more immediate team level within the classroom.

Dimension Nine: only one attribute (9c) loaded onto dimension nine. This attribute appears to focus on the provision of ‘study time’ to complete the programme. It is worth noting here that the original ‘organisational support’ dimension identified in the stage one interviews has been split within the factor analysis into three factors, namely organisational feedback, general organisational support and provision of study time to complete the course.

Dimension Ten: two attributes (8d and e) loaded onto dimension ten and formed a partial match with the dimension ‘university support’ which had been derived from stage one interview coding analysis. These attributes appear to focus particularly on the issue of ‘contextualisation’ of material to the organisation and its sector.

A summary of the dimensions derived from the stage one coding analysis and the dimensions derived from factor analysis is outlined in tables 29 and 30 below:

Stage One Coding Analysis	
DIMENSION	DEFINITION
UNIVERSITY SUPPORT	Support provided by academic staff, such as providing knowledge relevant to students’ work, providing regular feedback on student progress and contextualising their material to the organisation and its sector
ORGANISATIONAL SUPPORT	Support provided by the corporate organisation such as providing sufficient time for academic study, providing regular 1:1 reviews on progress and providing feedback on assignments
RETURN ON INVESTMENT	Return on investment for the individual student and for the wider organisation
CAREER DEVELOPMENT	Career progression for the individual student and enhanced succession planning for the organisation
CREDIBILITY	Enhanced reputation within the organisation and its sector
COLLECTIVE LEARNING	Opportunities for team-building, networking and learning from one another, plus learning for the wider

	organisation
PARTNERSHIP	Opportunities for co-design, co-delivery and co-ownership between the university and the organisation

Table 29: Dimensions derived from stage one coding analysis

Stage Two Factor Analysis	
DIMENSION	DEFINITION
PARTNERSHIP	Opportunities for co-design, co-delivery and co-ownership between the university and the organisation
CAREER DEVELOPMENT	Career progression for the individual student and enhanced succession planning for the organisation
ORGANISATIONAL LEARNING	Opportunities for networking and the wider organisation to learn ideas and concepts from the corporate education programme
CREDIBILITY	Enhanced reputation for the organisation and for the participants selected for the course
RETURN ON INVESTMENT	Return on investment for the individual student and for the wider organisation
ORGANISATIONAL FEEDBACK	Regular feedback from line managers on assignments and on progress with the programme
ORGANISATIONAL SUPPORT	Support from line and senior managers in providing encouragement and resources
TEAM LEARNING	Opportunities for team-building, and learning from one another as a cohort
ORGANISATIONAL STUDY TIME	Support from line managers in providing time and space to complete the programme
CONTEXTUALISATION	Contextualisation of the material provided by university staff to the organisation and its sector

Table 30: Dimensions derived from stage two factor analysis

In summary, the confirmatory factor analysis provided partial confirmation for the dimensions derived from the stage one coding analysis. However, it is clear that some of the original dimensions derived from stage one have been split into a wider set of dimensions by the factor analysis at stage two. A more detailed discussion of the implications of the differences between the dimensions can be found in chapter six, section 6.1.

#### 5.2.2.2. Cronbach's Alpha Analysis

The second inferential statistical test conducted involved a Cronbach's alpha analysis. As Bryman and Bell (2003, p159) note, "Cronbach's alpha is a

commonly used test of internal reliability. It essentially calculates the average of all possible split-half reliability coefficients. A computed alpha coefficient will vary between 1 (denoting perfect internal reliability) and 0 (denoting no internal reliability).” Figures between 0.70 and 0.85 are typically employed as a rule of thumb to denote an acceptable level of reliability, though many writers accept a slightly lower figure. Berthoud (2000, p169), for example suggests that a figure of 0.60 is ‘good’. For the purposes of this PhD research Cronbach’s alpha was utilised through means of SPSS to determine the extent to which items within a particular dimension on the survey questionnaire were associated with one another. The results were encouraging as outlined in table 31 below. The full SPSS results can be found in appendix 22.

Dimensions	Cronbach’s Alpha
University Support Expectations 8a – 8e	0.736
Organisational Support Expectations 9a – 9e	0.734
Return on Investment Expectations 10a – 10d	0.792
Career Development Expectations 11a – 11d	0.777
Credibility Expectations 12a – 12d	0.840
Collective Learning Expectations 13a – 13d	0.806
Partnership Expectations 14a – 14d	0.886

Table 31: Cronbach Alpha Scores

The results indicate an acceptable level of inter-item correlation within each dimension. Sufficient similarity exists between each item within a dimension to demonstrate that they relate to the same construct. Equally, sufficient difference exists to demonstrate that they address different aspects of the construct. The items within each dimension are conceptually aligned and make sense within their grouping.

### 5.2.2.3. Chi-Square Analysis

The third inferential statistical analysis involved a series of chi-square tests. Biographical information including gender, age, qualification and length of tenure was cross tabulated against expectation and perception items from the survey questionnaire instrument. Hypotheses were proposed as follows:

Null hypothesis ( $H_0$ ): there is no significant relationship between gender, age, qualification and length of tenure and each expectation or perception item within the survey questionnaire instrument

Alternative hypothesis ( $H_1$ ): there is a significant relationship between gender, age, qualification and length of tenure and each expectation or perception item within the survey questionnaire instrument

The procedure was as follows. Firstly, each element of biographical information was cross tabulated using SPSS against every expectation and perception item within the survey questionnaire instrument using all five Likert-scale responses. Secondly, in cases where the null hypothesis was rejected at the 5% level, suggesting a possible link between the two variables, the data was recoded in SPSS to include only three possible answers (disagree, agree and strongly agree) in order to achieve greater reliability. The results, which after recoding, still supported the alternative hypothesis  $H_1$ , were highlighted as being worthy of note, as seen in table 32 below. The full results are outlined in appendix 24.

<b>Cross Tabulation - Gender</b>	<b>Chi Square</b>	<b>df</b>
Return on Investment 18c	11.239	2
<b>Cross Tabulation - Age</b>	<b>Chi Square</b>	<b>df</b>
Return on Investment 10d	15.853	6
Partnership 14b	13.407	6
Organisational Support 17a	18.949	6
Organisational Support 17b	16.367	6
Organisational Support 17d	22.183	6
<b>Cross Tabulation - Qualification</b>	<b>Chi Square</b>	<b>df</b>
University Support 8a	10.248	
Credibility 20d	9.719	4
<b>Cross Tabulation - Length of Tenure</b>	<b>Chi Square</b>	<b>df</b>
Organisational Support 9a	13.631	6

Table 32: Chi-square Analysis

The results of the chi square analysis demonstrated that biographical information such as gender, age, qualification and length of tenure, when matched against expectations and perceptions of service quality, lead in most cases to the acceptance of the null hypothesis  $H_0$ . In the large majority of cases the chi square result fell below the critical value and supported the

hypothesis that the two variables are independent of one another. There is little association between biographical details and expectations and perceptions of service quality for corporate education. Where chi-squared results accept the alternative hypothesis, they are difficult to interpret in many cases as they are isolated examples relating to one particular expectation or perception item from the survey questionnaire. Given the close relationship between the items within a dimension, as evidenced by the Cronbach alpha scores, one might expect that if one item within a dimension supported an alternative hypothesis  $H^1$ , the other items within that same dimension would demonstrate the same. The fact that they are isolated examples and that in some cases the margin above the critical value is small, suggests that they should be treated as outliers rather than of great significance. There is, however, one set of results which is worthy of note. A strong association does appear to exist between age and perceptions of organisational support where three items within the same dimension (17a, 17b and 17d) all present scores which are well above the critical value. Here, it is evident that the older the respondent, the more likely they are to believe that organisational support has not been satisfactory and needs to be improved.

### **5.3. Stage Three Interviews**

The stage three interviews were targeted at four learning and development managers, one from each participating organisation. Each manager had an intimate knowledge of their particular corporate education programme. The interviews had two main aims. The first was to conduct a thematic analysis aimed at seeking corroboration (or not) for the findings of the questionnaire survey at stage two. In particular the aim here was to check whether the findings made sense and aligned with the four organisations' perspective on these issues. From a research perspective this would enhance triangulation and demonstrate content validity. The corroboration theme was tested by means of a coding analysis. In a similar manner to the stage one interviews it was found, after a cursory examination of the interview texts, that this theme was evident, but it was scattered throughout the textual material and not tied to particular questions. The most effective method of eliciting common themes

was to undertake a coding analysis drawn from the entire landscape of the interview texts. The second aim was to investigate each question in depth. A specific question analysis was therefore implemented for all questions to allow a direct focus on particular areas of interest. In terms of the balance of these two aims, whereas at stage one the greater emphasis was placed on thematic analysis, at stage three the greater emphasis was laid on specific question analysis. This approach was felt to be in line with the research paradigm of pragmatism adopted by this research. It made sense and helped to achieve the research objectives.

### 5.3.1. Coding Analysis

The coding tree outlined in table 33 below provides an overview of the coding elicited from the stage three interview texts. The frequency of occurrence of each code is articulated within the right hand column.

Coding Tree		
Codes	Frequency of mention	Frequency – no. of interviewees
<b>A Corroboration</b>	<b>38</b>	
A1 Organisational Support (OS)	6	4
A2 University Support (US)	5	2
A3 Return on Investment (ROI)	4	3
A4 Career Development CD)	4	3
A5 Collective Learning (CL)	4	3
A6 Credibility (CR)	1	1
A7 Partnership (PN)	1	1
A8 Survey Dimensions	3	3
A9 High E Scores	4	4
A10 P scores	1	1
A11 Survey Tool	5	4
<b>B Surprise</b>	<b>12</b>	
B1 Career Development (CD)	6	3
B2 Credibility (CR)	1	1
B3 Collective Learning (CL)	1	1
B4 Return on Investment (ROI)	1	1
B5 Organisational Support (OS)	1	1
B6 P Scores	1	1
B7 Overall Satisfaction Score	1	1

Table 33: Stage Three Interviews – Coding Tree



The full transcripts of the stage three interviews can be found in appendices 25-28.

### 5.3.1.1. Corroboration

The primary code ‘corroboration’ (A) gained the highest frequency of 38 occurrences and clearly confirmed that the responses to the stage two questionnaire had a high degree of accuracy. This code was applied when a respondent specifically agreed that in their opinion the findings were correct. Eleven aspects of corroboration were identifiable from the analysis as secondary codes (a) organisational support OS, (b) university support US, (c) return on investment ROI, (d) career development CD, (e) collective learning CL, (f) credibility CR, (g) partnership PN, (h) survey dimensions, (i) high E scores, (j) P scores, (k) survey tool. Examples of corroboration are provided below in table 34.

Corroboration	
A1 Organisational Support (OS)	<i>“I think that it’s interesting where we have 9c and 9d where we have the issue of line manager feedback that didn’t take place by participants’ line managers, yes, I get that. It is something we are trying to get our managers to focus on”. (Interviewee B)</i>
A2 University Support (US)	<i>“I certainly would have expected ..... university support” (Interviewee D)</i>
A3 Return on Investment (ROI)	<i>“But certainly I can see why.....return on investment, they ranked them as that” (Interviewee C).</i>
A4 Career Development (CD)	<i>“Then the career development piece, it doesn’t actually surprise me, if we look at who actually filled in the survey it fits the students themselves.” (Interviewee A)</i>
A5 Collective Learning (CL)	<i>“The collective learning for our organisation is not surprising and really it’s about the ability to share and break down siloes.” (Interviewee B)</i>
A8 Survey Dimensions	<i>“They [survey questions] do make sense”. (Interviewee B)</i>
A9 High E Scores	<i>“So it doesn’t surprise me that expectation scores are really, really high. I would imagine that anyone would go onto this kind of programme with high expectations”. (Interviewee A)</i>
A11 Survey Tool	<i>“I think it [the tool] is really useful. It genuinely raises some interesting points.” (Interviewee A).</i>

Table 34: Stage Three Coding - Corroboration

The results indicate a strong level of support for the findings from the dimensions that were ranked as having a higher level of importance, but also for some of the more general trends, such as the survey dimensions themselves and the high E scores. In particular, the survey tool itself is seen as an important potential component in the evaluation strategy of corporate education programmes.

### 5.3.1.2. Surprise

The primary code “surprise” (B) gained the second highest frequency of 12 occurrences and demonstrated that there were some elements of the survey results which the interviewees found surprising. This code was applied when a respondent specifically mentioned the issue of surprise. Seven aspects of surprise were identifiable from the analysis as secondary codes (a) career development CD, (b) credibility CR, (c) collective learning CL, (d) return on investment ROI, (e) organisational support OS, (f) P scores, (g) overall satisfaction score. From this group career development was deemed to be the most important.

Surprise	
B1 Career Development (CD)	<i>“In terms of career development, I don’t know why that is so low. Of the fifteen that started the course eleven of them are in new jobs and promoted, so I am surprised at that.” (Interviewee D)</i>

Table 35: Stage Three Coding - Surprise

The fact that the interviewees found the results surprising did not necessarily mean that they disagreed with the results, rather that they would like to investigate this issue further to find out why respondents had responded as they had.

### 5.3.2. Specific Question Analysis

In addition to the thematic analysis all survey questions were analysed using a specific question approach.

Question 1 – why do you think the expectation dimensions and questions in this questionnaire are different to those of other service quality questionnaires?

Two interviewees stated that the corporate education dimensions focused on bigger picture strategic issues as opposed to more detailed transactional issues which are commonly found within standard service quality instruments such as SERVQUAL, SERVPERF and HEdPERF.

*“I think what is interesting about these is that you are almost getting a bigger picture. So it is a much bigger wider picture of the programme as a whole rather than drilling down into ‘how is your trainer’, and ‘how are the facilities’ or ‘how are your hand-outs.....these issues are much bigger picture and strategic”. (Interviewee A)*

*“....well let’s face it, these are the bigger issues and I would say that normal customer service quality questionnaires are concerned with the transactional stuff and less about the value”. (Interviewee B)*

There are several reasons as to why this might be. Firstly, the organisation has invested a high level of time and money into a corporate education programme and consequently they are looking for big returns.

*“Certainly from our organisational perspective I have no doubt that our participants are acutely aware of the investment that was made on their behalf and also as a consequence of the value that they can bring back to the organisation and hence then deliver to our customers, through doing things differently or better”. (Interviewee B)*

A second reason relates to the fact that the respondents to the survey are older and more mature employees. The majority are middle or senior managers within their organisation with many years of experience within their sectors. As such, they are more likely to have strategic issues at the forefront of their minds.

*“In terms of why those [dimensions] have come out instead of quality of hand-outs or the classrooms etc., it could be to do with the maturity of the population”. (Interviewee B)*

One interviewee from the public sector mentioned that the question of whether an organisation focuses on bigger picture or transactional issues in service quality may depend on the changing business environment. At the time of responding to the survey the organisation was focused on strategic issues, but by the time of the stage three interviews, the changing business environment had led to a greater focus on transactional issues.

*“I think within the health sector though we are [now] looking more and more towards service improvement, the delivery of key performance indicators and very much focused on quality which may or may not leave education behind, depending largely where the individuals themselves are coming from.....things have moved”. (Interviewee C)*

Question 2 - Why do you think respondents have ranked certain dimensions so highly?

A variety of reasons were given by interviewees to this question depending on the particular ranking concerned. Return on investment was ranked highly in many cases because many organisations are focused on results and the bottom line. Managers within the organisation, including the learning and development team, are held to account by the senior management and are expected to demonstrate that any investment of resources results in added value for the organisation.

*“The return on investment could come potentially from the fact that we are a retailer, we are very focused on the bottom line, we are very focused on results, on scores, on anything we can measure and it is something which is discussed constantly. Nothing happens without an ROI being considered, it’s always there”. (Interviewee A)*

Career development was ranked highly in some cases because students have a high concern for their career and they are investing a large amount of time to the programme. This investment comes at considerable cost in terms of time and effort and sacrifice on the part of the family. It is not only the organisation that expects a return on investment. Students also seek their own personal return on investment in terms of enhanced career prospects with greater responsibility and financial reward.

*“The career development I might have expected to see further up the scale because of the investment the individual is making in this. I think they were doing it a little more for personal gain perhaps which isn’t reflected here”. (Interviewee B)*

The high ranking for organisational support reflects the fact that in order to gain maximum personal and organisational return on investment, a high level of resource needs to be provided from within the organisation. This may include not only support from the learning and development team, but also from line and senior managers. The organisation will gain from the corporate education experience in proportion to the level of resource that it is prepared to provide.

*“It does make sense to me, because if we are providing them with corporate education then the organisation need to support that, they will want return on investment, so I can see why people would want organisational support and get something back..” (Interviewee C)*

The high ranking for collective learning reflects the danger of a silo mentality in which each department within the organisation remains separate and does

not engage with the wider culture. One of the great benefits of a corporate education programme is the ability to bring employees from different parts of the organisation together and give them the opportunity to interact, to share information and to learn from one another.

*“I am not surprised about the collective learning at all given the organisational environment. We have been a traditionally siloed organisation. There is no opportunity for individuals to interact formally or informally”. (Interviewee B)*

University support was ranked highly because it is seen as the core teaching component of corporate education. Many students on corporate education programmes are experts within their job roles but may struggle with being involved in academia for the first time. Others may have a previous degree but have been out of higher education for some time and feel the need to refresh their academic skills.

*“The university support is an obvious one because how do you make this thing work if you haven’t got that? So, it is pleasing to see that the staff in 8a is one of the smaller gaps. That’s good”. (Interviewee B)*

*“University support is about right because for a lot of our people doing higher degrees this might be their first go, so they would want to know that they are not being set up to fail, so that is ok”. (Interviewee C)*

Question 3 - Are any expectation areas missing from the questionnaire? If so, which?

The first reaction of most interviewees was to confirm that there were no obvious areas missing from the survey questionnaire. However, after considering the question more fully, some interviewees articulated areas that they felt could have been included. Two interviewees mentioned the importance of content in relation to the corporate education programme.

*“Content of the course is quite important. I can’t see this in the actual questions. That is something we would look at after a training intervention. Was it pitched at the right level – too high, too low, delivery, but you have that in university support. So perhaps questions around the content itself and its value to the individual”. (Interviewee D)*

It was acknowledged that programme content is implied under the dimension university support. University support includes the expertise of lecturers and the importance of contextualising the material to the organisation and its sector, both of which imply the significance of content.

*“In terms of content it is implied in university support. I would like to think that we did lots of upfront work on content when we asked the original cohort what competencies that they believed the organisation’s manager needed to focus on. There was quite a lot of work done upfront on how does that align. It’s a reasonable point in that here we are now at the end of the process and how did all that wash its way through. But I do think it comes into that 8d in university support”. (Interviewee C)*

Interviewee A mentioned that the collective learning dimension could be widened to include other forms of learning.

*“Collective learning seems like such a specialist part of learning. You are not questioning the lecture style or group discussions or did online library work for you, only collective learning...only one aspect of learning. That learning question is bizarrely specific in relation to everything else. There should be a dimension around learning with a, b, c, d, maybe collective learning, individual reading, lectures, library etc. These are all aspects of the delivery”. (Interviewee A)*

Interviewee C added a number of further elements that could be included within the questionnaire. These included delivering value to the customer and delivering continuous improvement, including innovation. However, it was

acknowledged that these areas might be included under the return on investment dimension.

*“There may be something around this premise that if you are not personally delivering value to the customer or delivering value to someone who is, then there is an issue.....this may come under return on investment”. (Interviewee C)*

*“The only other thing going through my head is the continuous improvement piece. How has the learning enabled the individual to make a tangible difference and add value to the processes in the organisation? So, the continuous improvement piece maybe.” (Interviewee C)*

Question 4 - Why do you think the expectation scores have come out so high?

The results from the stage two questionnaire survey in relation to expectations were interesting in that they were overwhelmingly high. This proved true, not only for the overall results from the four organisations but also for each individual organisation. In terms of the overall results for all four organisations the weighted average scores were all above 4.00 except for one particular item. The mean score for expectations across all dimensions and items was calculated at 4.41.

A variety of reasons were given by interviewees as to why this should be the case, the most obvious of which was the high investment of time and money invested by both the individuals and the organisation.

*“The investment of time and money are important factors. It’s coming back to return on investment”. (Interviewee D)*

Further reasons for high expectation scores included the advertising for the course and the high level of goodwill throughout the organisation for the course to succeed.



*“Perhaps that is part of us talking things up. We had to do a lot of talking to get our Masters programme through Execs and we had to sell it to those who were perhaps a little reticent in the first place, as to whether they could do it.....so there is a high level of goodwill in there to want to succeed”. (Interviewee C)*

The high nature of expectations in this research study matches with the results of many previous service quality studies in which respondents tend to rate expectations high (Babakus and Boller, 1992, p254).

Question 5 - What is your view of the overall perception results?

The results from the stage two questionnaire survey demonstrated that perceptions were lower in all cases than those for expectations, except for one isolated case in relation to 12d academic success. This proved true, not only for the overall results from all four organisations but also for each individual organisation. In terms of the overall results for all four organisations the weighted average scores for perception resulted in a mean score of 3.48. This result appears quite hard to interpret. The perception scores are not bad but equally they are not spectacular. It is evident that this research study has resulted in a case of negative disconfirmation in which perception scores are lower than those of expectations (Spreng and Dröge, 2001, p262).

Interviewees within the stage three interviews were specifically asked for their views on the overall perception results. They found this a difficult question to answer perhaps due to the ‘middle of the road’ nature of the results. One interviewee felt that the overall perception results were positive whilst two further interviewees felt that they were disappointing. All agreed that there was clear room for improvement, particularly for certain dimensions.

*“In terms of the actual perception scores from an employer’s point of view probably some of those scores are a little disappointing and perhaps we could have done better especially with regard to line managers”. (Interviewee D)*

Question 6 - Your overall satisfaction score is x. What might be the reasons for this?

Most interviewees noted a mismatch between the detailed results for the dimensions and the results of the overall satisfaction question. Some noted that this may be because overall satisfaction is asked as a separate question.

*“When you fill out questionnaires and have a separate question the answer you give doesn’t always match up with what you thought beforehand”. (Interviewee C)*

The reasons given for high overall satisfaction scores were varied. The NHS organisation mentioned that this was the first academic course that the respondents had undertaken which led to a high sense of pride in their academic achievement. The insurance company mentioned that the course was seen as a worthwhile initiative and added value to the company. The reasons given for disappointing scores were also varied. The luxury retail organisation highlighted the fact that the organisation is highly self-critical because they work in a luxury sector where standards are very high. The builder’s merchant organisation pointed to specific issues such as poor organisational support and the issue of return on investment.

Question 7 - Why do you think the gap scores for certain dimensions and statements are higher? What factors may have contributed to this?

All four interviewees recognised that organisational support was weak, in particular the issue of line manager support, as evidenced by high gap scores in this area. One reason for this weakness is the operational or lean approach that operates within many organisations. Line managers are also sometimes focused on other priorities.

*“....but it puts some numbers around something we are already talking about in the organisation as to whether managers are quite operational, making sure stocks out, making sure staff are covered etc.*

*so they are happy letting their staff have time off the shop floor because that is an operational matter but are they then doing the support, the coaching, the conversation bit". (Interviewee A)*

Another reason for the lack of line manager support has to do with the nature of the managers themselves. They may feel threatened or feel that they do not have the capabilities to support the students.

*"Managers can sometimes feel threatened and feel that may come up short if they can't provide the type of support that is needed. I think that can sometimes happen especially when the manager doesn't have the same qualification and doesn't have the same opportunity and therefore might feel less confident in being able to provide the answers. They may not want the challenge". (Interviewee C)*

The issue of weak line manager support is not limited to corporate education programmes alone. It is a problem common to most L&D programmes.

*"We do suffer from that with our general learning programmes, briefing and de-briefing them and so forth". (Interviewee B)*

One organisation mentioned that line manager support was weak because they had focused too much on senior management support.

*"We probably focused too much on the senior management aspect of it in trying to support the students and yet day to day their line managers didn't understand enough about the programme or the requirements of the course". (Interviewee D)*

All four interviewees recognised that career development was a problem issue, as evidenced by high gap scores in this area. The interviewees stated that there can be no automatic right of passage from a successful participant on a corporate education course to an enhanced career. One reason for the high gaps in this area involves poor communication of expectations to the

students. It is essential that accurate and realistic expectations of career development are given to prospective students at the outset.

*“In terms of career development....maybe this is something either we didn’t articulate clearly enough or the career development expectations were different to what we thought as L and D or the management team.....our degree is not quite so clear. It is not saying by the end of it you will be a manager, it is saying by the end of it you will have a better understanding of selling. It is almost up to you what you do with your career after that”. (Interviewee A)*

A further reason for the high gap scores in relation to career development relates to poor talent management or succession planning. This is an area of HR practice which is often overlooked or forgotten, yet it is essential to the long term survival of the organisation.

*“In terms of career development, I don’t know why that is so low....the succession planning in the organisation isn’t as good as it could be. It is something we are working on now and we are hoping to get a succession plan created”. (Interviewee D)*

Finally, the high gap scores in this area may indicate the fact that a higher qualification doesn’t necessarily mean that a person has the capabilities to do the job. Completion of a corporate education course may indicate a higher level of knowledge attained but it does not automatically result in enhanced performance which can only be proved within the workplace.

*“In terms of career development.....as an organisation we tend to look more at clinical and technical skills rather than academic learning. As you progress up the career path within this organisation the importance of a qualification gets more limited as go up the career ladder. Having a qualification doesn’t actually mean you can do the job. Having a qualification doesn’t always come first in terms of employing somebody”. (Interviewee C)*

All four interviewees recognised that some areas of university support required some improvement. Although the gap scores in this area were not as high as those for organisational support, the issue of feedback from academic tutors was a matter of concern. One reason for this weakness was inconsistency of feedback and lack of regularity of feedback.

*“In terms of 8c feedback from the university regarding student progress.....I thought there was a reasonable job done in terms of looking at draft assignments and that kind of thing. Maybe there was inconsistency around that, maybe some tutors did that more than others. That could be a reason. So the expectations may have been a bit all over the place”. (Interviewee B)*

Feedback was arguably better in the early stages of the course but tailed off as the course progressed.

*“In the beginning it was better within the first year, we met regularly with the university but that certainly tailed off and there wasn’t enough communication to us as an organisation and I know some of the students felt that way, that they didn’t get enough feedback on their assignments”. (Interviewee D)*

An important element of the feedback problem may have related to the structure of the corporate education programme. Much of the teaching was delivered on a block basis.

*“Maybe because the teaching was done on a three day block basis the students may have felt that there wasn’t a lot of interaction with tutors outside of the block”. (Interviewee B)*

A further area of concern in relation to university support related to a poor level of contextualisation of the teaching material to organisational issues. It was recognised that this is a difficult task but academic lecturers were not spending enough time researching the organisation and its sector.

*“In terms of university support I think the one that has the biggest gap, not huge but more important than the others is around helping the students to apply the theory to practice. I think at one level that is always going to be a challenge. It’s a different organisation and that lecturer might be a lecturer of psychology not a lecturer of retail. So a little bit of a discrepancy there is to be expected. However, I do think it is something we should be mindful of....this does highlight that there does have to be the commitment from the lecturer to totally get the organisation. They need to make that commitment and that effort”.*  
(Interviewee A)

Two interviewees recognised that the credibility dimension had high gap scores. One reason for this weakness related to a lack of communication about the success of the programme. The level of publicity is often high in the early stages but needs to be maintained as the programme becomes embedded into the learning and development strategy over a period of time.

*“In terms of credibility I am surprised by the high score because we did win an award and everyone was aware of that. It was well publicised. That award was fairly early on. Maybe it is about the sustainability of that. Maybe it relates to communication in the business which is consistently, if you look at the employer engagement survey, something that we really do need to focus on, because we haven’t got it right”.* (Interviewee B)

A further reason for the high gap scores for credibility relates to a lack of credibility placed on academic qualifications.

*In terms of credibility, I am not sure as an organisation how much credibility we put on academic qualifications. Much of the workforce is an ageing workforce and probably came through a clinical rather than an academic route and therefore some of them wouldn’t want to admit that they themselves didn’t have a qualification that their staff are now gaining and therefore they wouldn’t want to think ‘I haven’t got a*

*qualification and I am a line manager'. I wonder if that played a part."*  
(Interviewee C)

The builder's merchant organisation noted that they had achieved an interesting result for question 12d on the credibility dimension in relation to academic success. This was the only example of perceptions exceeding expectations in the entire PhD research study. The reason for this exceptional result related to the fact that the corporate education programme at its inception was unique both within the organisation and the industry and therefore seen as an extremely valuable asset.

*"It is interesting that the issue of credibility is the only response in the whole research study where perception was higher than expectation. I honestly think that this is because we have not done this before. In the history of the company we have previously only educated one or two people to this level but a programme like this, an academic higher level qualification, we have never done before and I think that that's probably why.....the fact that they did that and passed it with the various grades that they got, I think that made them feel really good.....we have been followed since then, a couple of our competitors have done it. Our professional body has now brought out a foundation degree. The course has been a success for our credibility both within the organisation and within the industry".* (Interviewee D)

Question 8 - What can be done by the university or the organisation to address the areas with high gap scores?

All four interviewees recognised that organisational support could be improved by better communication. This could be undertaken through a variety of approaches but essentially the top priority involved face to face meetings with line managers.

*"The communications around organisational support need to be improved. Line managers need to be clear about what the purpose of*

*the course is, what the objectives of the modules are, timelines...you can argue that chasing up is wasteful but I think we need to encourage that element of it. Communication involves the whole spectrum.....but it should include everything from the initial briefing right the way through to how we follow up after with tutorials and assignments etc.”*  
(Interviewee B)

Interviewee C also mentioned the importance of greater senior management buy-in and greater alignment with corporate objectives, as important areas of organisational support to strengthen for the future.

*“So I think gaining greater buy-in is most important.....we have a PMO office from which all the projects come out in terms of strategic change. Aligning a corporate education programme to those areas would support greater buy-in. If it aligned to a strategy, then everyone will have a stake in it and will want to make sure it happens”. (Interviewee C)*

In terms of career development, several interviewees also mentioned the importance of communication.

*“Then we need to make sure that when we are recruiting against it we articulate that clearly. We must then ensure that we maintain that throughout the programme. This should be articulated at the recruitment stage, at the selection stage and continuously throughout so that delegates don’t lose sight of why they are on this programme”. (Interviewee A)*

Further approaches to improving the career development expectations included greater clarity on programme outcomes and better succession planning.

*“I think we need to think about as an organisation what we want the outcome to be realistically. We then need to look at whether the*



*programme can give us those outcomes and if the content of the programme is right for that and then once we have agreed that it is, we need to make sure that the programme gives us that". (Interviewee A)*

*"In terms of career development we need a more robust talent development programme within the organisation than we have currently, including succession planning. We don't succession plan for people moving up within the organisation". (Interviewee C)*

A variety of suggestions were presented by the interviewees for improvements in university support. These included "walking the floor" to improve contextualisation,

*"In terms of university support.....they [academics] should do the floor walk and really get to understand our business. They should do that with any organisation they work with. They should literally do a floor walk with a couple of people, get a sense of the business, get a sense of the challenges, get a sense of the reality of that business and how it ticks, the sort of language they use and the challenges they face and really feel the organisation" (Interviewee A)*

Feedback to students could be improved by better scheduling and by utilising e-technology such as Skype or distance learning tutorials.

*"Tutorials might have helped. If there was a distance learning component, students could have an online chat. Maybe there weren't the mechanisms in place to allow that to happen efficiently". (Interviewee B)*

One suggestion for improvement in university support involved the development of a wider partnership that involves research alongside the corporate education programme.

*“In terms of university input it would be good to have more senior academics who publish papers and write books as well as doing their lecturing to be working alongside the organisation on a particular issue.” (Interviewee C)*

Another option would be to set out university expectations more clearly in a guidance document.

*“Also, in terms of the university, before the programme starts, they could mention that this is what you need to do for your students. The university should set out what their expectations might look like in a guidance document. That might have been useful”. (Interviewee D)*

In terms of improving the credibility dimension, suggestions included external promotion through tenders and market publications as well as internal promotion through greater use of past students on the corporate education course.

*“In terms of credibility I would wish to understand more about that but I sense that is about our ability to promote this externally and promote what we have done and to sell the benefits of what we have done and how it adds value to our clients. This can be done through our tenders, aligning more closely with the promotion that our sales people use. Also, market publications. We could do more around promotional articles and updates. Internally we need to make more of these people and use them well which links with career development”. (Interviewee B)*

Question 9 - How helpful is this tool in evaluating corporate education?

All four respondents expressed a high degree of positivity towards the survey questionnaire tool.

*“Immediately when thinking about this for evaluation I am up in the fours, thinking about the same rating scale, so I would say very valuable.....seeing it here I think it is a good benchmark exercise. I think if this is what has mattered to the respondents of the survey, especially as senior managers also responded, since all stakeholders provided responses to these measures then that’s absolutely valuable. So, yes we should pay attention to the results and we should act on them”. (Interviewee B)*

*“I think it is very useful, I do, because there are some measures in there which we wouldn’t have thought of”. (Interviewee D)*

In particular the interviewees found the comparison between expectations and perceptions particularly valuable.

*“I think it is interesting doing the questionnaire this way because most feedback or evaluation on a programme is only about perceptions. So, on an evaluation form I might answer ‘did this course help me with my career?’ It doesn’t ask me what I expected it to deliver for my career and now what it has delivered for my career and to look at the gap. Most questionnaires only ask you what you are thinking at the time. This asks you what you wanted it to do and then what it is actually doing for you. It is a different way of looking at it”. (Interviewee A)*

Question 10 - When should the tool be used in the evaluation process?

All four interviewees instinctively reacted by stating that the evaluation tool should be used after the corporate education programme.

*“It is always logical to go towards the end”. (Interviewee C)*

On further reflection all four respondents mentioned that it may be most beneficial to use the tool halfway through the programme.

*“Would there be any harm in doing it halfway through? No, probably not, actually”. (Interviewee A)*

*“I also wonder if it would be useful to use it halfway through to see how we are progressing”. (Interviewee D)*

The advantage of using the tool halfway through the programme lies in the ability to fix problems that have arisen early on.

*“The benefit would be that you can take some action to make the changes”. (Interviewee B)*

*“It’s good to do it at the end but it would be interesting to do a version halfway through so that if you did have large gaps they could be addressed and improved. You could make some changes and course adjustments”. (Interviewee C)*

#### **5.4. Conclusion**

This chapter has presented the findings from the research. The stage one interviews have been analysed by means of a first cycle, second cycle coding exercise. The stage two survey questionnaire has been analysed by means of descriptive statistical analysis, based on weighted averages and percentages and by inferential statistical analysis, based on factor analysis, Cronbach alpha analysis and Chi-square analysis. The stage three interviews have been analysed by means of a first cycle, second cycle coding exercise. In the next chapter these results will be analysed and discussed in more depth.

## Chapter Six – Analysis

### 6.0. Introduction

*Synopsis: This chapter provides a detailed analysis of the findings. It discusses the findings in depth, integrates material from all three stages of the research and draws upon academic literature from chapter two and three, as appropriate, to enrich the discussion. The structure of this chapter is based upon the research objectives to ensure that the aims of the research study are fully met.*

### 6.1. Expectations of Corporate Education Programmes

Research Objective 1: To identify and analyse the expectations of service quality within corporate education programmes

*Analysis: expectation dimensions for corporate education are different in nature from other service quality studies of this kind.*

Research question one asked “do stakeholders have the same expectations for corporate education programmes as they have for open education programmes?” The first and most obvious finding from this research study is the fact that the expectation dimensions and items for corporate education are different in nature to other expectation and perception studies of this kind. The original SERVQUAL scale as delineated by Parasaruman et. al. (1985) placed an emphasis on tangibles, reliability, responsiveness, assurance and empathy. Parasaruman et al. (1988, p30) stated that later studies might prove to be different arguing that SERVQUAL “provides a basic skeleton.....the skeleton, when necessary, can be adapted or supplemented to fit the characteristics or specific research needs of a particular organisation”. The expectations for corporate education are also different from those found by Firdaus (2006b) within the HEdPERF scale which was used on open programmes within a Higher Education setting. Firdaus also recognised that different industry or sector settings might need an adapted scale arguing that “perhaps the time has come to ‘bury’ the existing instruments and attempt to

reconstruct or redefine service quality from a new perspective” (Firdaus, p572). Firdaus (p573) found that expectation dimensions for open education programmes included non-academic aspects, academic aspects, reputation, access, programme issues and understanding. The findings of this research study on corporate education programmes demonstrate similarity to the HEdPERF scale in certain respects. University support in this research study bears some relation to ‘academic aspects’ within HEdPERF. Credibility within this research study also bears some relation to ‘reputation’ within HEdPERF. However, many of the dimensions and items in the corporate education scale bear little relation to HEdPERF. Organisational support, return on investment, career development and partnership are all issues which pertain particularly to corporate education programmes.

The finding that expectation dimensions and items within corporate education are largely different from those in other settings is not surprising. Interviewees within the stage one interviews from this research study revealed clearly that open education programmes within higher education are different in nature to corporate education programmes. The difference lies in a number of factors, as evidenced by the responses to questions two and three of the stage one interviews (chapter five, section 5.1.2.). The teaching material is bespoke and highly contextualised to the organisation and team building is seen as a vital component in the learning process. The university and the organisation both feel a strong sense of ownership of the corporate education programme and the provision of the corporate education experience is the responsibility of both parties. This leads to a high level of engagement on the part of the organisation and the participants.

In the stage three interviews, respondents were specifically asked why the expectation dimensions for corporate education were different to those of other service quality scales (chapter five, section 5.3.2.). The primary answer related to the fact that in corporate education programmes the focus is on strategic, bigger picture issues as opposed to more transactional service quality issues. One reason provided for this view involves the fact that a large amount of time and money is invested into corporate education programmes

and they are consequently looking for large returns. This is true of both the organisation and the individual participant on the programme. A second reason relates to the age and maturity of the respondents. They were either students who were comprised of mature and reasonably senior employees within the organisation or higher level managers who had an interest and stake in the programme (including learning and development managers, line managers or senior managers). It is not surprising then, that their focus was on higher level, strategic issues. This may reflect the distinction made by Guskey (2000, p41) between merit and worth. Worth relates to the organisation's mission and its perceived value to the organisation's stakeholders. Merit is a property of the programme itself and should be judged against established standards of excellence within the profession. A training programme may have great merit but be of little worth to the organisation. Senior stakeholders within the organisation are more concerned with worth.

Corporate education is more complex than open education in a number of respects. As noted by Kessel and Plomp (1999, p679), within corporate education "the cognitive operations of individual learning intertwine with the social processes of an organisation". The first area of complexity has to do with the nature of the customer. In open education programmes the relationship is relatively straight-forward consisting of a relationship between the student and the university, with the student as the customer and the university as the service provider. In the corporate education context the customer is different. The purchaser of the education is normally the organisation and specifically consists of the learning and development team and senior management. In this sense the senior decision-makers (plural) are the customer and the participants on the programmes are the end-users. Additionally, the participants on the programme are themselves relatively senior staff within the organisation and as such have an important voice in the evaluation process. The second area of complexity has to do with the nature of the service provider. In corporate education the corporate organisation often works in partnership with the university to provide the educational experience. This may include guest speaker input, mentoring and facilitation of project teams. The service provider is therefore both the university and the

organisation. As indicated by Enz and Lambert (2011, p506), corporate education is generally most effective when it is led by cross-functional, cross-firm teams. The two organisations work in a symbiotic relationship with each other to provide an overall educational experience which has high practical relevance to the organisational mission of the organisation. A third area of complexity relates to the teaching and learning strategy offered in corporate education. This includes an emphasis on work-based learning with its high level of contextualisation to the workplace and a strong emphasis on collective learning and team building. Various approaches to the learning process may be utilised including action projects, learning teams and mentorships that permit and encourage learning dialogues (Raelin, 2008, p2).

*Analysis: expectations for corporate education programmes can be categorised into the following dimensions: organisational support, university support, return on investment, career development, collective learning, credibility and partnership.*

Analysis of the stage one initial interviews derived seven expectation dimensions (with an associated thirty statements) for corporate education programmes. The factor analysis from the stage two questionnaire survey results derived ten dimensions. The question clearly arises here as to why this level of difference might be the case. On the one hand the mismatch between the two sets of dimensions may indicate that the stage one coding analysis was inaccurate. However, the expert panel who reviewed the stage one coding analysis stated that in their opinion the analysis was conducted fairly and accurately. The frequency with which the major codes occurred for each dimension would also suggest that the stage one coding analysis was accurate. On the other hand the mismatch between the two sets of dimensions may indicate that the factor analysis was problematic. The small sample size of 50 respondents was deemed sufficient to make an attempt at factor analysis. As Field (2013, p684) articulates, a small sample size may still be reliable. However, he also recognises that 300 or more respondents is an ideal sample size. It is possible that in the case of this research study the sample needs to be extended to the recommended size of over 300



respondents. An extension of the sample size may iron out anomalies and produce a more comprehensive match with the stage one coding analysis.

Whilst either of these inaccuracies may be the case, a closer inspection of the differences between the two sets of dimensions reveals that the distinction between them may not be as great as one might initially think. Table 36 provides a comparison between the two dimension sets.

DIMENSIONS – CODING ANALYSIS	DIMENSIONS – FACTOR ANALYSIS
University Support	Contextualisation
Organisational Support	Organisational Feedback Organisational Support Organisational Study Time
Return on investment	Return on Investment
Career Development	Career Development
Credibility	Credibility
Collective Learning	Organisational Learning Team Learning
Partnership	Partnership

Table 36: Comparison between the two dimension sets

The comparison indicates that four of the dimensions are broadly similar, namely return on investment, career development, credibility and partnership. Organisational support is seen as important but has been split within the factor analysis into three dimensions all of which are distinct aspects of the role of the organisation in corporate education, namely feedback from line managers on assignments and progress, interest and encouragement from senior managers and finally time and space to complete the programme. The factor analysis highlights how important each of these individual aspects are in providing organisational support to the participants on the programme. However, they do appear to fit quite well under the overall category of ‘organisational support’ as suggested by the stage one coding analysis. Similarly, collective learning is seen as important but is split within the factor analysis into organisational learning and team learning. Again, these highlight distinct aspects of the learning process, namely the immediate learning from within the student group and the wider learning as the insights and ideas from the corporate education programme are disseminated outwards to the wider

organisation. Once again however, they do appear to fit well under the overall category of 'collective learning' as suggested by the stage one coding analysis. Finally, it is interesting to observe that in the stage two factor analysis the issue of contextualisation is highlighted as a factor in its own right. This fits with the stage one coding analysis in which contextualisation was also derived as a major theme. In the event contextualisation was included as an integral part of university support within the stage two questionnaire, but it may be that in future iterations of the questionnaire contextualisation should stand alone as a new dimension and be given more prominence within the survey.

In conclusion, there appears to be a reasonable degree of similarity between the two sets of dimensions. The dimensions derived from the original stage one coding analysis, based on the views of senior organisational staff, appear to be a useful framework (with contextualisation as a possible new dimension) for encapsulating the expectations of stakeholder groups within the corporate education process. The discussion of the expectation dimensions outlined below, is therefore based on the original dimensions from the stage one coding analysis.

The first dimension, with the highest frequency of mention in the coding analysis, was organisational support. The significance of this dimension was supported by the second stage questionnaire survey, in which organisational support achieved the highest rank for importance in the overall results for all four organisations. It is interesting that organisational support was ranked higher than university support. It demonstrates the very high expectation placed on the organisation as a co-provider and partner in the corporate education experience. In particular, line manager and senior management support are deemed to be essential to the effective implementation of the programme. As Normann and Ramirez (2000, p66) recognise, value is co-created when the parties involved in a buyer-supplier relationship combine their knowledge and skills to achieve higher profits than would be achieved by working independently. A value constellation can be created in which a wide variety of partners including suppliers, business partners, allies, and

customers work together to co-produce value. Organisational support is an essential element in the corporate education process and combines with university input to create a high value educational provision. As Ryan (2009, p1317) notes there are several benefits to partnership between the university and the organisation. Benefits include opportunities to understand the realities of the workplace, opportunities for cross-pollination between industry and academia and opportunities to make money.

The dimension with the second highest frequency of mention from the stage one coding analysis was return on investment. This was supported by the stage two questionnaire survey which ranked this dimension as second equal in importance in the overall results for all four organisations. The notion of return on investment remains high on the agenda of corporate education programmes and is clearly still seen as the “holy grail” of management development (Redford, 2007b, p1). The high rank for this dimension highlights the fact that corporate education is implemented to drive forward the aims and objectives of the organisation and ultimately increase the bottom line. It is difficult to know exactly what perspective of return on investment respondents had in mind when they completed the questionnaire, whether it was return on investment as a concept, return on investment as a management tool or return on investment as a practical formula, which produces real figures to prove the financial return for the corporate education experience (Kearns, 2005, p65). However, what is certainly clear is that all stakeholders, from senior managers through to students on the programme are mature enough to recognise that the educational experience must lead to demonstrable outcomes of some kind for the organisation and for customers. As Phillips (2003, p24) states, return on investment is important for many reasons. It measures the impact of training, it helps to set training priorities, it focuses on results, it earns respect from senior executives and sponsors and it alters management perceptions of training.

The dimension with the third highest frequency of mention in the stage one coding analysis was career development. The stage two questionnaire survey ranked this dimension as fourth in importance which is reasonably high. As

Brennan and Little (1996, p10) state in relation to work-based learning, corporate education enables students to gain personal development, career advancement and portable qualifications. Indeed, organisations may offer inducements to employees to take up work-based learning study. These may involve remuneration, career progression and recognition (Shipley, 2001, p146). The high status of this dimension is largely due to student expectations of the programme, but is also of concern to more senior stakeholders in relation to talent management and succession planning. As noted by Shipley (2001, p148) the succession planning driver is an essential motivation for work-based learning, and ensures that the capability base of the organisation has survival and growth beyond the employment term of current employees. Career development is strongly linked to return on investment as career development is one expected outcome of a corporate education programme.

The dimension with the fourth highest frequency of mention in the stage one coding analysis was credibility. The stage two questionnaire survey ranked this dimension with a rank of sixth in importance which is quite low. In the initial stage one interviews several interviewees stated that credibility was a key issue. It is worthy of note that in the HEdPERF scale, as defined by Firdaus (2006c, p569) reputation is seen as an important dimension, which is similar in some respects to the credibility dimension found within this research study on corporate education. However, within the HEdPERF study the reputation dimension relates to the reputation of the university. It is defined as “the importance of educational institutions projecting a professional image”. Within the corporate education context however, credibility relates primarily to the credibility of the partner organisation. A degree bearing award from a chartered university is seen as important to the organisation as opposed to an in-house non- award-bearing short course. One of the essential elements is that it receives academic recognition (Boud and Symes, 2000, p14). Gaining academic recognition also increases the status of the corporate education programme within an industry or sector and may increase competitiveness (Brennan and Little, 1996, p10).

The dimension with the fifth highest frequency of mention in the stage one coding analysis and mentioned by eight interviewees was university support. The stage two questionnaire survey ranked this dimension as second equal in importance which is reasonably high. It is perhaps surprising that this dimension is not higher within the stage one interviews especially in terms of frequency of mention. It is hard to know why this might be the case and no interviewees expressed a view on this matter, except that they saw university support as generally important. It may be that the university is seen as a supplier of teaching content rather than as the main provider and it is the organisation which takes the main focus. Indeed one of the organisations terms their corporate education programme as 'the [insurance company] MBA' rather than the university MBA, which gives an indication as to where their focus lies. Alternatively, it may be that university support is taken for granted and is not one of the central issues on the minds of stakeholders when thinking about their expectations of corporate education. The university support dimension is similar in some respects to the 'academic aspects' dimension found within the HEdPERF study. 'Academic aspects' are defined by Firdaus (2006c, p569) as "responsibilities carried out by academic staff, such as positive attitudes, regular feedback to students, a good reputation as an institution, degrees which are recognised internationally, educated and experienced academic staff". In the context of corporate education the first three items within the credibility dimension bear some similarity, relating to the expertise of lecturers and their knowledge of their field as well as the importance of regular feedback to students. However, the major difference, as one might expect, lies in the emphasis within the corporate education context on contextualisation of material to the organisation and the application of theory to practice. Key features of corporate education include customisation of the learning package to the organisation (Shipley, 2001, p150), and a different work-based approach to pedagogy (Garnett, Comerford and Webb, 2001, p111). Learners are able to analyse workplace experiences, and apply their learning to multiple courses of action within the workplace (Tennant, 2000, p127).

The dimensions with the lowest frequency of mention were collective learning and partnership. The stage two questionnaire survey ranked these dimensions as fifth and seventh respectively in importance which is quite low. Nonetheless, in stage one and stage three interviews the interviewees still rated these areas as important and relevant, demonstrating that they are worthy of their place as relevant dimensions within the questionnaire survey. The collective learning dimension highlights the belief that one essential benefit of corporate education programmes is the opportunity to learn from one another, to build relationships and to network within the organisation. Many writers have stressed the benefits of learning teams (Raelin, 2008, p2), action learning sets (Revans, 1998, p10), or problem-based teams (Duch, Groh and Allen, 2001, p7). The partnership dimension highlights the importance of a coordinated approach by both the university and the organisation which intertwine in a set of complex interactions to provide an excellent corporate education experience. The combination of the university and the organisation working in partnership together creates a high level of value for customers. As outlined by Joshi and Chebbiyam (2011, p675) “co-creation is the positive sum relationship between two or more businesses, which collectively create value by providing access and transparency of information, engaging in dialogue, and sharing of risks”.

Finally, all seven dimensions received a high level of support and corroboration from the stage three interviews (chapter five, section 5.3.1.). Interviewees stated that the dimensions made sense and were indeed highly relevant to corporate education programmes. Where they did express surprise, it was not to negate the results, but rather to seek further information as to why the results had come out as they had. When asked whether any important areas were missing one or two respondents mentioned the need for programme content to be included. Whilst it was recognised that this issue is implied within the items for university support, it may be that this dimension could be tweaked to make the issue of content more explicit within future iterations of the survey questionnaire.

## 6.2. Perceptions of Corporate Education Programmes

Research Objective 2: To identify and evaluate the perceptions of service quality within corporate education programmes

*Analysis: perception scores are lower than expectation scores and therefore the concept of 'return on expectations' is not borne out by the study*

Research question two asked “Is the notion of ‘return on expectations’ a helpful concept?” The notion of ‘return on expectations’ was first presented by Voller (2010b, p8) in an unpublished paper on the Ashridge perspective on evaluation, stating that “we have found that focusing on return on expectations is more helpful than seeking to reach the ‘holy grail’ of evaluation, measurement of return on investment (ROI)”. It is interesting that in this article Voller does not clarify the definition of ‘return on expectations’. However, the service quality literature would suggest that it involves a case of positive disconfirmation in which perceptions exceed expectations (Spreng and Dröge, 2001, p262).

It was immediately evident from the service quality literature review that in most cases respondents tend to rate expectations high (Babakus and Boller, 1992, p254) demonstrating that in most cases positive disconfirmation ( a return on expectations) is unlikely to occur. Nonetheless, in addition to the findings from the literature review, it was deemed important to answer the research question and confirm through primary research that positive disconfirmation is unlikely within the context of corporate education.

The stage one interviews in this research study asked a direct question as to what stakeholders thought about the concept of return on expectations. The feedback was very positive, although most interviewees focused their answers on the merits of expectations and perceptions rather than on the specific issue of ‘return’ on expectations (chapter five, section 5.1.2.). The interviewees stated that the notion of expectations and perceptions brought a deeper qualitative approach to evaluation and drew in the opinions of different stakeholder groups within the evaluation process. These stakeholders

included those who had a vested interest in the evaluation, could support the evaluation and who had decision-making responsibility with respect to the evaluation (Martineau, 2004, p1).

The results from the stage two questionnaire survey demonstrated that perceptions were lower in all cases than those for expectations, except for one isolated case in relation to 12d academic success. This proved true, not only for the overall results from all four organisations but also for each individual organisation. In terms of the overall results for all four organisations the weighted average scores for perception resulted in a mean score of 3.48. Interviewees within the stage three interviews were specifically asked for their views on the overall perception results (chapter five, section 5.3.2). They found this a difficult question to answer. One interviewee felt that the overall perception results were positive whilst two further interviewees felt that they were disappointing. All agreed that there was clear room for improvement, particularly for certain dimensions.

It is evident that despite the positive reaction to the concept of return on expectations in the stage one interviews, the results of the stage two survey questionnaire instrument present clear evidence of negative disconfirmation in which perception scores are lower than those of expectations (Spreng and Dröge, 2001, p262). Therefore primary research, alongside secondary research from the literature review indicates that it is unlikely that a 'return', where perceptions exceed expectations, will occur. The notion of expectations and perceptions of service quality is useful but the concept of 'return on expectations' for corporate education programmes is not borne out by this study.

### **6.3. The Gap Between Expectations and Perceptions**

Research Objective 3: To identify and critically evaluate the gap between expectations and perceptions of service quality within corporate education



*Analysis: organisational support is characterised by high gap scores and presents an important area of concern, but it is a dimension that the university has no direct control over.*

The gap scores for all items within the dimension organisational support were high enough to be highlighted as an area of concern. An examination of the overall results for all four organisations demonstrated that all gap scores for organisational support were above 1.00 and the mean score for the dimension was calculated at 1.45. The gap scores for each individual organisation revealed similar findings. The level of concern was increased by the fact that organisational support had the highest ranking in terms of importance of all the seven dimensions. Effectively, the most important dimension of expectation was characterised by a high level of negative disconfirmation. The stage three interviews explored this issue in some depth and several reasons were given as to why the gaps were so high, especially in relation to line managers. These included the fact that line managers are taken up with operational issues and don't always have time for student support. They may also resent the time taken by the student away from the business. As Brennan and Little (1996, p121) state, one of the problems for students within a work-based context is the inability to get time off. Line managers may also feel threatened or do not feel they have the capabilities to support the students (chapter five, section 5.3.2.). For most students handling this ambivalence and managing these differing expectations may not be an easy task (Solomon and McIntyre, 2000, p118).

A problem with this particular issue of concern is the fact that the university, as the main supplier of the corporate education teaching experience, has no direct control over this dimension. It is primarily an issue for each organisation to take up internally with their senior management team and indeed with their line managers. This highlights one of the particular idiosyncrasies of corporate education. It involves a partnership between two organisations and each organisation must play a full part in the process for the educational experience to be successful. The university may be able to influence the organisation and provide practical input for line managers but as a supplier its level of influence

may be limited. As Solomon and McIntyre (2000, p116) argue, universities face a weakening of control within the corporate education process. Universities are ceding authority to other and more powerful interests beyond educational institutions. Tennant (2000, p 123) agrees “universities may lose their monopoly over the accreditation, production and distribution of knowledge”). Much will depend on the strength of the relationship between the link coordinator at the university and the learning and development team within the organisation in solving this potentially difficult issue. The organisation itself may also struggle to resolve the problem as learning and development managers may not have direct authority over line managers. Success will depend either on the influencing and negotiating skills of the learning and development team or on the level of senior management buy-in to the programme which will force line managers to take the issue of support seriously.

*Analysis: return on investment presents an area of concern for some organisations. Despite the limitations outlined within the literature review concerning return on investment, it remains an important expectation dimension for corporate education programmes.*

Return on investment has been used as a tool in evaluating corporate education for many years. As already noted in chapter three, there are many advocates of this approach. Phillips (2003, p24) outlines the benefits of return on investment as including: it measures the impact of training, it helps to set training priorities, it focuses on results, it earns respect from senior executives and sponsors and it alters management perceptions of training. Nonetheless many criticisms have been levelled at return on investment as a tool for evaluation. It is difficult to assign monetary values to benefits such as improved morale and reduced stress levels (Murray and Efendioglu, 2007, p373), employee morale, workforce stability, lower absenteeism, job satisfaction, supervisory skill development and improved customer relations (Campbell, 1994, p35). Redford (2007b, p1) argues that measuring return on investment is probably a waste of time, because it is not cost efficient, there are serious doubts about the robustness of return on investment formulae and

most organisations are not interested in learning and development figures anyway”. Other writers argue that less return on investment measurement is happening than one might think. Whilst 86% of respondents are evaluating at Kirkpatrick’s level one, only 42% are evaluating at level 2 and 30% at level 3. Only 11% are evaluating at level 4 and 3% at level 5 (Charlton and Osterweil, 2005, p9). A further problem is that sponsors of executive education may not be as wedded to proof of return on investment as many HR professionals assume (Charlton and Osterweil, 2005, p13).

Despite these criticisms of return on investment, the findings of this research study demonstrate that it remains an important expectation of corporate education programmes. It may be true that few organisations are measuring return on investment for corporate education programmes and indeed the four organisations in this research study are among them. Nonetheless, all stakeholder groups still perceive that return on investment is important. Two out of the four organisations flagged this dimension up as an area of concern. The luxury retail organisation had three gap scores above 1.00 and the NHS hospital had all four gap scores above 1.00. Whilst it is true that these scores relate to perceptions and are not quantifiable in monetary terms, the perception could still be important in influencing organisational stakeholders and in deciding whether a corporate education programme should be repeated. Perceptions are discussed within the organisation, opinions will be expressed and if the organisation at senior level ‘perceives’ that the programme is not making a difference to organisational performance, it is likely to be scrapped. This will be especially so when budgets get tight.

*Analysis: career development presents an area of concern but there is no automatic right of passage to an enhanced career*

The gap scores for all items within the dimension career development were also high enough to be highlighted as an area of concern. Whilst it seems reasonable to assume that corporate education will enable students to gain personal development, career advancement and portable qualifications (Brennan and Little, 1996, p10), this is clearly not always the case. An

examination of the overall results for all four organisations demonstrated that all gap scores for career development were above 1.00 and the mean score for the dimension was calculated at 1.44. The gap scores for each individual organisation revealed similar findings. Career development also had a reasonably high ranking amongst the dimensions, with one organisation (luxury retail) placing the rank at 1=. The stage three interviews explored this issue in depth and several reasons were given as to why the gaps were so high. Reasons included poor communication of expectations to the students, poor talent management or succession planning and finally the fact that a higher qualification doesn't necessarily mean that a person has the capabilities to do the job (chapter five, section 5.3.2.). It is clear that there is a difference of expectation here between the students on the programme, who see the corporate education programme as a stepping stone to career progression, and the more senior stakeholders, who understand the importance of succession planning and talent management for the future development of the organisation. As noted by Shipley (2001, p148) succession planning is an essential motivation for work-based learning, and ensures that the organisation will survive and grow for the long term. In the event, many of the students on the corporate education programmes have found more senior job roles since graduation, but not in all cases. As some of the learning and development team interviewees articulated in the stage three interviews, having an academic qualification does not automatically mean that you have the knowledge, skills and attitudes to perform well at a higher level. Many other factors will be considered when making decisions during the selection process. The essential problem here is one of communication. It is possible that the large build-up of expectation surrounding the programme, the high level of internal marketing and the strong feeling of goodwill in making the programme succeed, leads to a false impression that promotion will be an automatic outcome. Potential participants are aware of the personal rewards and greater sense of self-esteem that can come from completing the programme (Garnett, Comerford and Webb, 2001, p109). It is therefore not surprising that they expect career development as an outcome. Indeed, the potential for promotion may even have been discussed during selection interviews for the programme in some cases. It is clear that the organisation

needs to be more circumspect in their internal marketing processes and ensure that they do not present false expectations. Moreover, the organisations, by their own admission, need to ensure that they have robust succession planning and talent management processes in place which are well communicated to the workforce and demonstrate that the potential exists for promotion. In the selection process a higher qualification will be a useful contributory factor in an application, but will not be an automatic right of passage.

*Analysis: aspects of university support present an area of concern, an issue over which the university does have direct control*

Some gap scores for items within the dimension university support were also highlighted as an area of concern. An examination of the overall results for all four organisations demonstrated that item 8c relating to feedback from university staff had a gap score of 1.15. Two out of the four individual organisations also had high gap scores above 1.00 relating to contextualisation and theory into practice. University support also had a high ranking amongst the dimensions, with the overall results from all four organisations placing the rank at 2=. It was seen as an important dimension by the organisations but clearly some aspects of the support were not working efficiently. The stage three interviews explored this issue in depth and several reasons were given as to why the gaps were so high.

In terms of contextualisation and theory into practice, one would expect high customisation of the learning package to the organisation within corporate education (Shiple, 2001, p150). However, high gap scores in this area presented an issue of concern. The main reason articulated for the high gap scores was the lack of time invested by the teaching staff in researching the organisation and its sector (chapter five, section 5.3.2.). This may reflect the challenge of finding the right academic staff to provide corporate education. Universities need to “reposition the academic” (Boud and Solomon, 2001, p30) towards a greater focus on customisation and contextualisation. The role of the academic may also require a shift from expert in a discipline to

facilitator in learning (Schwartz, Mennin and Webb, 2001, p2), which includes a strong emphasis on organisational context. This may pose a threat to some academics who are not able to make this transition. The issue of contextualisation to the organisation and theory into practice will always be a difficult task, as mentioned by the interviewees at stage three. Academic staff may teach on a variety of corporate and open programmes and may not have the time to engage in detailed research of the context for each one. Nonetheless, contextualisation is clearly a high expectation of corporate education programmes and creative approaches must be found, within the usual time constraints, to acclimatise academic staff to the organisation and its sector. The university may need the assistance of the organisation in this important task.

In terms of academic staff feedback, the expectation is that the tutor would work with the students to provide feedback at every stage of the programme. The tutor should act as a guide who assists learners to 'learn from experience', and who monitors their performance, processes their concerns and acts as a critical commentator (Tennant, 2000, p129). However, the high gap scores in this area demonstrate a clear weakness that needs to be resolved. The stage three interviews highlighted the lack of consistency and regularity of feedback to the students and the organisation. Indeed, the feedback was often better at the start but declined over the course of the programme. The structure of the programme was also problematic. Much of the teaching content was delivered in one day or three day blocks with a gap between them, which added to the irregularity of face to face contact with the tutors. When considering the issue of feedback from academic staff two issues are apparent. The first is feedback to the organisation in relation to student progress. Corporate education offers a vehicle for linking individual learning to the development of corporate capabilities (Boud and Solomon, 2001, p18). Feedback to the organisation would normally take place through messages or face to face meetings between the university coordinator and the learning and development team within the organisation. However, it is clear that this process is characterised by a problem of 'communication drift'. Enthusiasm and good intentions at the start of the programme gradually lead

to complacency and surrender to a wide variety of other urgent priorities. The second issue involves feedback to students on the programme. There are some university processes to accommodate this. Students receive feedback from their assignments and they often receive feedback after assessed presentations on the strengths and weaknesses of their approach. Approaches to assessment for work-based learning are often different from those of traditional taught programmes and they present the opportunity to engage in a high degree of critical reflection engage constructively and deeply with ideas (Boud, 2001, p48-57). However, the feedback from assignments and presentations is largely summative and there is little opportunity for students to receive feedback on work they have completed during the course of the semester. Students also have the opportunity to take part in programme committee meetings, which normally for corporate education programmes, all students will attend. In these meetings the feedback is often two-way, with students giving feedback to tutors and tutors giving feedback to students. However, these meetings normally take place once per semester, which means there are several weeks without the opportunity for face to face dialogue. In one corporate education programme (luxury retail) one-to-one tutorials are built into the schedule, but this is not the case across the board. In the case of some organisations the extra time taken away from the workplace by tutorials, on top of teaching delivery, would be problematic. A further problem relates to the fact that in some cases programme participants fly in from abroad for a three day block. With added flight time, the time commitment is already high.

*Analysis: expectations and perceptions of different stakeholder groups do differ from one another.*

Corporate education programmes involve a variety of different stakeholders, including line managers, plus academic supervisors and peers (Shipley, 2001, p150). External stakeholders may also be involved, for example independent training providers (Garnett, Comerford and Webb, 2001, p111). As Thackwray (1997, p38) argues, stakeholders will have different perspectives. Important questions to ask include why the training and development action is important

to them, what their stake is in it and what values, biases or experiences might influence their judgement about the programme. Voller (2011, pp28-29) found that there are usually one or two critical individuals behind the initial decision to commission a programme but there are a variety of further stakeholders involved alongside them.

Research question three asked “do expectations and perceptions of corporate education vary according to stakeholder group?” The stage one interviews indicated clear differences between the stakeholder groups (chapter five, section 5.1.2.). The expectations of students on the programme relate to their learning and the application of learning to the workplace. They are also concerned about career development, monetary reward and increased motivation within the workplace. These expectations are primarily personal in nature and relate to their individual aspirations to make progress within the organisation at a variety of different levels. In contrast, the expectations of senior managers are pitched at a much higher strategic level with the needs of the wider organisation in mind. They are focused on the achievement of organisational goals, the need for financial return, and for improved business results. They also have an expectation that the programme will act as an aid to succession planning and that the knowledge gained from the programme will be disseminated throughout the company. Line manager expectations focus largely on the development of their subordinates. They are looking for improved knowledge, skills and attitudes as well as enhanced work performance. Finally, the expectations of the learning and development team are focused largely on the programme itself. They are concerned with the creation and implementation of an effective learning programme, talent management and student success. They are also mindful of the high level of publicity, both internally and externally, that may arise from a successful programme.

Whilst it is clear that the stage one interviews highlighted clear differences between the expectations of different stakeholder groups it is interesting that there does not appear to be a high degree of conflict between them. Yngfalk (2013, p1177) recognises that “when multiple actors interact, a complex



network of different interests and logics must co-exist in every given context....the result is fragmented and disharmonised value creation processes...actor's resource integration is dependent on their background, previous experiences and present goals. Hence actors embody various and often contradictory, understandings and perceptions of value". However, despite Yngfalk's concerns, no indication was given in the stage one interviews that serious conflicts were present. Indeed it is interesting to note that the stage two survey questionnaire results did not highlight differences between stakeholders to the same degree. Here, the analysis was divided into two main groups including students on the programme and more senior stakeholders (a combination of senior managers, line managers and learning and development staff). The analysis from both stakeholder groups indicated that organisational support and career development were areas of concern with several gap scores above 1.00. Additionally, one item of university support, 8c relating to academic staff feedback also had a gap score of above 1.00 in both cases.

When considering the reasons for such a similarity between the two main stakeholder groups the answer may relate to the age, experience and maturity of the respondents. Students on a corporate education programme are older, as indicated by the biographical analysis from the survey questionnaire. 84% of students on the programme lie within the 31-50 age bracket. They also have experience of working within the organisation. 68% of students on the corporate education programme have worked with the company for more than six years. They are also mature and reasonably senior employees within the organisation. For the most part, they are middle managers, aspiring to senior management posts. In many cases they have line management and budgetary responsibility and contribute to strategic decision-making. It is perhaps not surprising that participants on corporate education programmes are 'senior' stakeholders, since the demands of this type of learning are considerable. They include the ability to analyse workplace experiences, the ability to learn from others, the ability to act without all the facts available and the ability to choose among multiple courses of action (Tennant, 2000, p127). In some cases, therefore, the students may be of equal rank or even more

senior than the learning and development team, who coordinate their programme. This demonstrates the particular and unusual nature of corporate education programmes. The homogeneous nature of the stakeholder groups is also borne out by the chi-square analysis which demonstrated a null hypothesis in most cases finding little association between biographical details and expectations and perceptions of corporate education.

The stage two survey questionnaire analysis did identify some minor variations between the two stakeholder groups. The gap scores for the student stakeholder group were higher in some cases than the scores for the senior stakeholder group. For example, in the organisational support dimension the mean score for the student stakeholder group was 1.69 whereas the mean score for the senior stakeholder group was 1.08. Likewise, in the career development dimension the mean score for the student stakeholder group was 1.50 whereas the mean score for the senior stakeholder group was 1.36. The difference between the gap scores here is perhaps not surprising since the students have more of an emotional connection with the programme. If organisational support is not forthcoming, they are the ones to suffer. If career development does not look likely, their future looks bleak. The more senior stakeholders are clearly aware that these areas are a matter of concern, and it is arguably to their credit that they have acknowledged this, but it is not surprising that they do not feel it to the same extent. It is not their professional development or their career that is at stake here. The difference between the two stakeholder groups in relation to the credibility dimension is harder to judge. The student stakeholder group indicated that this was an area of concern, with three high gap scores above 1.00. The senior stakeholder group indicated that this was not such an area of concern with all gap scores just under 1.00. However, although one set of scores falls above the 1.00 threshold and one set of scores falls below the threshold, in reality the scores are not that far apart. The mean for the student stakeholder group in the credibility dimension is 1.07 whereas for the senior stakeholder group it is 0.69. This marginal difference may indicate an issue alluded to by interviewee B in the stage three interviews. The corporate education programme does have credibility within the organisation and sector

but maybe this has not been communicated enough both internally and externally. It may be that students on the programme are so aware of the problems of the programme, especially whilst completing a service quality questionnaire, that they cannot see the overall credibility of the course that is clearly evident to other stakeholder groups.

#### **6.4. Conclusion**

This chapter has provided a detailed discussion of a range of findings related to the objectives and questions proposed for the research study. The chapter has concluded that expectation dimensions for corporate education are different in nature from service quality studies of open education programmes. They include a variety of different dimensions such as organisational support, return on investment, university support, career development, collective learning, credibility and partnership. The chapter has also concluded that perception scores are lower than expectation scores and therefore the concept of 'return on expectations' is not borne out by the study. A final conclusion relates to the fact that expectations and perceptions of different stakeholder groups do differ from one another. The expectations of students on the programme are primarily personal, whereas the expectations of senior managers are more strategic. Line manager expectations are largely orientated towards their subordinates, whereas the expectations of the learning and development team are focused on the learning programme itself.

## Chapter Seven – Recommendations and Conclusions

### 7.0. Introduction

*Synopsis: This chapter seeks to answer research objective four 'to make recommendations as to how corporate education programmes can be improved within contemporary business organisations'. It outlines the final recommendations and conclusions from the research study. The chapter proposes a series of general recommendations followed by specific recommendations for corporate organisations and universities engaged in corporate education. Finally, it presents a series of conclusions which include limitations of the research and suggestions for further study plus some final thoughts on the gap in knowledge which this research study has addressed.*

### 7.1. General Recommendations

*Recommendation: the expectation and perceptions survey questionnaire used in this research study is a valuable survey tool and should be utilised by corporate organisations*

Research question four asked “Is the survey questionnaire designed for this research study, relating to expectations and perceptions of corporate education, a useful tool in the evaluation of corporate education?” The stage one interviews provided a clear indication that the topic of expectations and perceptions might be of great value in the evaluation of corporate education. Interviewees were asked for their views on the notion of ‘return on expectations’ (see chapter 5, section 5.1.2). The overwhelming response was positive. Interviewees argued that the concept of expectations brought a qualitative dimension to evaluation. Numbers alone are not enough. The measurement of expectations and perceptions has the potential to create a multi-dimensional evaluation from the perspective of different stakeholders. Interviewees recognised the limitations of measuring return on investment stating that it provides cold, raw data and needs to be surrounded by qualitative perspectives to create real meaning. Also, it does not always work

well in practice. Nonetheless, interviewees recognised that return on investment is still important, especially for senior stakeholders within the organisation. In conclusion, some interviewees suggested that a full and balanced perspective on evaluation needs both return on investment and the measurement of expectations.

The stage three interviews provided a clear indication that the notion of expectations and perceptions of service quality did indeed make a valuable contribution to the evaluation of corporate education. By this stage the opinions of the interviewees were based, not on surmise but on a foundation of results derived from the survey questionnaire. The coding analysis provided corroboration from all four interviewees that the questionnaire survey tool was a valuable asset in the evaluation process (see chapter 5, section 5.3.2). In question 9, when asked about the usefulness of the tool, interviewees were particularly positive about the gap between expectations and perceptions, which is not normally a feature of evaluation questionnaires in corporate education. The questionnaire may benefit from further refinement, especially in relation to the content of the programme, but essentially it is a valuable tool that the four organisations targeted in this study would use in future when evaluating their corporate education programmes. Answers to question ten also indicated that the tool would be particularly useful halfway through the course. This would give the learning and development team time to correct any perceived areas of concern and improve the service quality levels for the future. This aligns with one of Easterby-Smith's (1994, p13) key purposes for evaluation, namely 'improving' which implies an emphasis on trying to ensure that the current or future programmes and activities become more effective for the future. As Voller (2011, pp28-29) argues, the main contribution of evaluation to the decision-making process is in modifying and improving the design after training has taken place. It may also contribute to the decision as to whether to continue with further iterations of the programme in future.

The expectation and perceptions survey tool has several unique features, all of which need to be communicated to prospective corporate organisations. It is a tool aimed at multiple stakeholders including the key decision-makers

who were involved in initiating and sanctioning the programme. They are also the stakeholders who will assess the effectiveness of the programme and make a judgement as to whether the programme will continue for the future. The tool is not a 'happy sheet' which is normally presented to students after each module has been completed. Rather, it is holistic and draws in the perspectives of a range of different groups within the organisation. It involves all key stakeholders in the evaluation process and may increase their sense of ownership and engagement with the programme. Evaluation is not solely the preserve of the learning and development team. It is the responsibility of all parties and the process of evaluation assists senior stakeholders in making important decisions about the future of the programme.

A related feature of the survey tool is its strategic nature. The focus is not on transactional issues, as demonstrated by many service quality questionnaires, but on strategic issues such as return on investment, credibility, collective learning and partnership. These are the issues that matter to senior stakeholders. They will leave the transactional issues to the learning and development team and the university to sort out in good time. Their focus is elsewhere, on the strategic implications of the corporate education provision. This reflects the unique nature of corporate education programmes and returns to the question 'who is the customer?' The student is the end user, but the senior stakeholders are arguably the customer. It is the senior management team who ultimately purchase the provision. In question fourteen in the initial stage one interviews, interviewees were asked 'who is the most important stakeholder?' The highest frequency of response related to the senior stakeholders. Question thirteen in the same interviews asked what the different expectations of different stakeholder groups might be. The answers relating to senior managers included achievement of organisational goals, financial return, better business results and succession planning. All of these are strategic issues and of vital importance to the organisation as a whole.

A further feature of the survey tool is that it investigates both expectations and perceptions and measures the gap between the two. Whilst this is not unique

to service quality questionnaires, it is unusual in the evaluation of corporate education programmes. Most corporate organisations will measure perceptions in one form or another, mostly through questionnaires to the students on the programme, but few will investigate the service quality gap, as originally outlined by Parasaruman et al. (1985). The gap concept presents an interesting new approach for many corporate organisations in terms of evaluation. The inclusion of expectations as well as perceptions adds a new dimension to the process. One might have a perception score that seems quite low and appears to be an area of concern, but if the expectation score for the same item is also low, then the concern may not be that great. It is the gap between the expectations and perceptions that reveals whether or not a response is serious and this is a key feature of the survey questionnaire utilised in this research study.

Finally, an important benefit of the expectation and perceptions survey tool is that it can be utilised as a diagnostic tool halfway through a corporate education programme and at the end, to enhance and refine the programme. Utilisation of the tool halfway through the programme provides all stakeholders with an opportunity to express their perspectives on the success of the programme so far. It highlights any immediate areas of concern, which can be quickly addressed. This approach will ensure that the evaluation process has an immediate impact on the programme being undertaken. There is nothing more demoralising than thanking students for taking part in a survey and informing them that the findings will help the next cohort of students, rather than the current cohort of which they are a part. Equally, senior stakeholders will be more impressed by prompt assessment and improvements, than by delaying the evaluation process. Once the areas of concern are fixed halfway through the programme, a further survey questionnaire can be conducted at the end of the programme and the results can be compared. One would hope that the perception scores at the end of the programme would reflect the improvements that have been implemented.

Whilst there are real benefits to the expectation and perceptions survey tool, it is not enough in and of itself. Completion of the survey questionnaire presents

a stream of raw data which needs interpretation. The purpose of the tool is to gain expectations and perceptions from a range of stakeholders within the organisation and provide a foundation for discussion. The tool exists to start a conversation. It acts as a catalyst to generate insight and to stimulate future action. Service quality questionnaires of this kind answer the question 'what', but they do not answer the question 'why'. Once the data has been collated, it is important to investigate the reasons that lie behind the expectations and perception scores, celebrate areas of success and assess how any areas of concern can be improved for the future. This discussion is best completed between the university coordinator and the learning and development team, although more senior stakeholders from both parties may wish to be involved. The learning and development team are best placed to improve the corporate education programme and assess whether it has made an impact on organisational effectiveness. The university coordinator is best placed to make programme corrections and respond to any concerns relating to the input from academic staff.

In summary, the unique features of the expectations and perceptions survey tool demonstrate that it has much to offer organisations in the evaluation of corporate education programme and these features should be promoted when dealing with any new prospective corporate clients.

*Recommendation: the concept of a 'return' on expectations is not helpful for use within the evaluation process*

Whilst the assessment of expectations and perceptions is of great benefit to the evaluation process, the notion of 'return' in this area is likely to lead to disappointment. For reasons already articulated in chapter seven, expectations of corporate education are generally high in all areas. Many factors may be involved including the age and maturity of the respondents and the high level of investment of time and money on the part of many stakeholders. The particular nature of corporate education makes it unlikely that expectations will be exceeded. Even where they are exceeded, as in the case of the one sole example from this research study, the level to which they



are exceeded is not likely to be high. Since almost all the expectation weighted average scores in this study were well above 4.00, there is little headroom for a large positive disconfirmation to be evident from the gap analysis. The notion of 'return' implies more than a minor level of exceeding perceptions. It implies a degree of positive disconfirmation. The notion of 'return' on expectations should therefore be dropped from the evaluation vocabulary.

## **7.2. Recommendations for Corporate Organisations**

*Recommendation: organisational support should be improved through greater communication with line managers*

The stage three interviews indicated that the key to addressing concerns over poor organisational support lies in better communication. In particular, communication with line managers in the support process is essential. Line managers are best placed within the organisation to understand the strengths and weaknesses of their subordinates. They are able to observe individuals within the workplace and assess their ability to apply learning from the corporate education programme to real business problems and opportunities. However, the line manager is often the person who is most left out of the support process. Part of the problem lies in the line managers themselves. They are often extremely busy individuals with a high level of operational challenges to resolve. They may feel threatened by the fact that their subordinates are gaining new ideas and understanding which they have not had the chance to study. They may also feel they lack the capacity to support their subordinate with the right advice, especially if they do not know the material that is being taught in class sessions. Part of the problem may also lie in the fact that they are the forgotten element in the support process. Senior managers are often involved in the early stages in sanctioning and encouraging the corporate education programme. There is often a high level of publicity to be gained in this process which requires high level organisational support. Likewise, the learning and development team are fully involved in setting up the programme and ensuring that it is implemented.

Both these stakeholder groups have an important presence in the corporate education programme. The line manager is the forgotten element in the support process and must be included as an essential element in helping to make the corporate education programme a success.

Line managers should be involved at every stage of the corporate education process. They should be involved in recruitment and selection by providing a reference for the individual applicant and giving final sanction for them to take part in the programme. They should receive an information pack which provides an overview of the programme, including aims and objectives, content and timetable. They should attend an induction meeting prior to the start, led by the learning and development team, with some senior managers present, which outlines the importance of the programme to organisational objectives and provides a clear set of expectations of the line manager role in the support process. The expectations of the line manager could be set out in a guidance document written by either the university or by the learning and development team. The line manager should also be engaged throughout the corporate education programme. This may involve regular 1:1 meetings with the student, attendance at any presentations the student might make as part of the assessment and further meetings with the learning and development team for information and feedback. The exact nature of the line manager role in the support process will vary according to each individual organisation and will be open to negotiation, but it must be seen by all stakeholders as an essential element in the support process.

*Recommendation: career development should be improved through greater communication with prospective students*

Career development should also be improved by better communication. Realistic expectations regarding career prospects must be communicated to applicants at an early stage. This is a difficult balance. It is understandable that the organisation will want to promote the corporate education programme positively, especially with the first cohort of students. The high level of investment in terms of finance and decision-making credibility makes it

inevitable that the corporate education programme will be 'talked up'. This may lead prospective students to believe that participation in the programme will be an automatic right of passage to an enhanced career. The learning and development team must provide clarification, in initial promotional meetings and in the selection process, that although the corporate education programme is part of a talent management and succession planning process, participation does not mean automatic promotion in the future. Participation in the corporate education course will enhance an applicant's CV and it will provide evidence of recent learning and development activity, but the programme is essentially for the purpose of 'personal development' rather than 'career development'. There are many factors which are taken into consideration when interviewing a prospective candidate for a new job role and the completion of a corporate education programme is only one of them. Nonetheless, talent management and succession planning are important issues and corporate education programmes can make a real contribution to that process. Therefore, it is important for each organisation to make clear exactly what the outcomes of the programme might be and publish a wider succession planning policy which will clarify the expectations of the organisation in regard to policy around promotions and career enhancement. Clarity around these issues will prevent the mismatch of expectations and perceptions which were evident from this research study. The learning and development team will need to gently reiterate this message throughout the programme at regular intervals, especially as the reputation of the programme increases within the organisation. At the completion of the programme with any given cohort, it is understandable that the marketing department will wish to publicise the success of the programme and include case studies of those who have been promoted on graduation. However, these success stories must be communicated sensitively to ensure that false expectations are not created for the future.

### **7.3. Recommendations for University Business Schools**

*Recommendation: university support should be improved through better academic staff orientation to the organisation and its sector*

University support needs improvement in three main areas. Firstly, academic staff members from the university require an improved orientation to the organisation and its sector. Contextualisation will always be a key issue for corporate education. There are a variety of ways in which this might be implemented. Academic staff could be invited by the organisation to 'walk the floor'. This could take several forms. They could act as a 'mystery shopper' and experience the organisation from the customer perspective. They could walk around the organisation's primary and support activities, guided by one of the learning and development team and ask questions of many employees in different parts of the organisation. They could undertake observational research and watch employees in action. The advantage of this approach would be the opportunity to 'feel' and 'see' the organisational culture and environment. Alternatively, academic staff could be provided with a detailed briefing by a member of the organisation's senior staff team on the organisational strategy and structure and on the industry sector. This approach has the advantage of including many of the academic team who will be teaching on the programme. The briefing could be accompanied by recent market research reports, if available. A further possibility involves academic staff engaging in a series of interviews or focus groups with key members of staff from the organisation. The findings could be written up into some form of briefing document for the future. Other options include utilising some of the staff from the organisation in the teaching process as guest lecturers or the recruitment of full-time academic staff with past experience in the sector concerned.

*Recommendation: university support should be improved through more regular feedback to students and other organisational stakeholders.*

Academic staff members need to provide more regular and consistent feedback to students. There are a variety of ways in which this might be implemented. Firstly, a strong emphasis should be placed on formative feedback as well as summative feedback. This is not always easy if the delivery mode is a residential week or a three-day block. Nonetheless, wherever possible exercises or draft assessments could be provided which

allow opportunity for academic staff to provide feedback and suggest improvements. Even on a three to five day block it is possible to build in small individual or group presentations which allow students to organise their thoughts, critically evaluate the issues and present a coherent business case. Secondly, a stronger system of virtual communication should be put in place between the module tutor and the participants. Traditionally, tutors have relied on e-mail messages and telephone calls for any ongoing contact. This tends to be ad-hoc and initiated by the students if they perceive they have a problem. A more robust communication system could be implemented, with each student having a tutorial built into the teaching programme. The tutorial could be delivered by Skype or Webex or a university VLE system. This approach would be more time and cost intensive for academic staff, but if it is built into the programme budget, it may be manageable. Thirdly, a more radical suggestion is to include a distance learning component into all corporate education programmes. This blended approach would allow for group forums, buddy systems and regular interaction with academic staff. It would also allow for more pre-reading, follow-up exercises and draft assignments to be included in the overall teaching process.

*Recommendation: university support should be improved through the development of a wider partnership with the corporate organisation.*

The partnership between the organisation and the university could be strengthened to include a wider set of activities, of which the corporate education programme is one key component. Firstly, the potential exists for co-research, whereby academic staff from the university work with organisational staff to research areas of interest within a sector or industry. The organisational staff will contribute knowledge of the sector and contacts within the industry as well as a wealth of practical knowledge of contemporary issues in their field. Academic staff will provide the academic background and understand the potential gaps in knowledge where a strong contribution to research may be made. Secondly, the potential exists for consultancy opportunities, whereby academic staff members with the right capabilities engage in practical projects within the organisation or its industry alongside

organisational staff. It may be better to develop existing partnerships into full-service opportunities, rather than rely on the constant requirement for new contracts, which ebb and flow with the vagaries of the corporate education market.

## **7.4. Conclusions**

### **7.4.1. Limitations of the Research and Suggestions for Further Study**

*Limitation: the research study focused on only four organisations leading to a relatively small sample size*

The units of analysis in this research consisted of four contemporary business organisations. In many respects these were well chosen. They were all medium to large organisations with over 500 employees, based in the United Kingdom. They were comprised of a variety of sectors including luxury retail, insurance, builder's merchants and NHS. They had all completed one cycle of a corporate education programme on a range of business management topics. They were all involved in offering closed programmes, leading to credit-bearing Anglia Ruskin University awards by means of face to face delivery. Finally, they were all committed to the principle of corporate education, including the need for a strong partnership between the organisation and the university. However, only four organisations were involved in the research study. This inevitably restricted the sample size. The type of people targeted for the interviews and the survey questionnaire were all relatively senior within the organisation, including the students on the programme and it was not possible to negotiate access to more, given the strong demands on time within a busy organisation. Consequently, the survey questionnaire at stage two was only distributed to 80 potential respondents. Although this response rate was extremely encouraging with 50 respondents completing the questionnaire, the relatively low numbers inevitably restricted the level of statistical analysis that could be conducted. For example, it is normally recommended that confirmatory factor analysis is implemented with a sample size of at least 300 respondents and this size of sample was clearly

not possible in this case. Although confirmatory factor analysis was conducted and demonstrated partial confirmation of the survey tool dimensions and associated statements, it did not fully confirm the survey questionnaire structure. A larger sample from a wider range of organisations may be required to provide greater confirmation or alternatively the structure itself may require revision to achieve a fully confirmed form. An example may include programme content. This issue is implied in some of the items in the university support dimension. For example, item 8a states 'academic staff members should provide knowledge relevant to students' areas of work'. Item 8d states 'academic staff members should contextualise the material to the organisation and its sector'. Both these items relate to the issue of course content. However, there may be value in revisiting some of the statements to refine the wording and make the issue of programme content more explicit. Revisions of this kind would be within the spirit of many of the early service quality questionnaires such as SERVQUAL and HEdPERF where the questionnaires went through several minor modifications until a final version was deemed to be acceptable.

*Limitation: the research study analysed the expectations of different stakeholder groups, but this is an area which needs exploration in more depth.*

The expectations of four stakeholder groups were evaluated within the stage one interviews, namely students on the programme, learning and development staff, line managers and senior managers. The analysis indicated a curious paradox. At one level the four stakeholder groups clearly have definite differences between them. The expectations of students on the programme are primarily personal in nature and relate to their individual aspirations to make progress within the organisation at a variety of different levels. The expectations of senior managers are more strategic and focused on the needs of the wider organisation. Line manager expectations focus largely on their subordinates in terms of improved knowledge, skills and attitudes and improved work performance. Finally, the expectations of the learning and development team are focused largely on the creation and

implementation of an effective learning programme. At another level, the gap scores gained from the stage two questionnaire survey indicated that there is a degree of similarity and homogeneity between the perspectives of the different stakeholder groups. This reflects the fact that the stakeholder groups are reasonably senior within the organisation. Whilst they have different roles in the corporate education process, they share similar perspectives on what they would expect from a programme of this kind. This paradox indicates that the expectations and perceptions of the different stakeholder groups might benefit from further study to understand the full complexity of their nature within the evaluation process.

*Limitation: the research study analysed the expectations of different stakeholder groups within the organisation, but did not investigate the expectations of stakeholder groups from within the university*

This research study has focused on the expectations of stakeholder groups within the corporate organisation. This was a decision made early on in the methodology process, when the expectations of many stakeholder groups were identified. The decision not to widen the research was made to avoid an unhelpful level of complexity and maintain a discrete focus for the study. Nonetheless, the findings of this study have revealed the importance of partnership between the organisation and the university in the corporate education process. The expectations of university stakeholders are therefore extremely important. These might include corporate education staff members who coordinate the programme, academic staff who teach on the programme and senior managers who will assess the resources required and the potential income to the university. This is an area that would benefit from further study.

#### **7.4.2. A Contribution to Knowledge**

*Contribution: a new context for the study of expectations and perceptions of service quality*



This research study has made a useful contribution to knowledge. Firstly, it has provided a new context for the study of expectations and perceptions of service quality. As noted in the literature review in chapter three, SERVQUAL has been applied to a wide variety of different industries and sectors. HEdPERF is a more specific tool which has been applied into one industry or sector, namely the particular context of higher education (although mostly to open education programmes). The corporate education tool utilised within this research study focuses the application more narrowly onto the individual service level and argues that essentially open education and corporate education are conceptually and practically different services. Both service categories are of great value within the overall university teaching portfolio, but the emphasis of all previous service quality studies has been on open education programmes. Corporate education is a different service. It is conceptually different from open education, resting on a utilitarian foundation with roots going back to the work of Locke, Durkheim and Dewey (Locke, 1778; Durkheim, 1893; Dewey, 1918) and is informed by several academic research streams which include experiential learning, work-based learning, action learning and problem-based learning. It is also practically different to open education. It is closed or semi-closed in nature and involves a complex set of relationships between the university and the organisation. The application of service quality approaches in a generic manner to an industry or sector is not enough. Specific service categories, such as corporate education are so conceptually and practically different from other product types within an industry or sector, that they require a unique service quality approach.

*Contribution: a focus on the role of different stakeholder groups in the assessment of service quality*

Most service quality studies that utilise the expectation-perception gap analysis approach focus on the relationship between the service provider (normally a university or college) and the customer (normally the individual student). This research study has demonstrated the importance of taking a variety of stakeholders into account. Corporate education is an obvious context in which to implement this approach as it involves a partnership in

which a complex web of stakeholder perspectives is involved. The service provider comprises both the university and the organisation. The customer includes both the end user and multiple senior stakeholders including learning and development staff, line managers and the senior managers who ultimately purchase the provision. However, even in open education programmes the stakeholder group may be wider than a simple university and student relationship. Parents and employers may also have an interest in the service quality of the educational provision. This is a subject for further investigation beyond the remit of this research study, but it highlights the importance of evaluating the expectations and perceptions of a range of stakeholders within the education process.

*Contribution: a survey tool which has potential to make a valuable contribution to the evaluation of corporate education programmes*

Finally, the research study has indicated that the survey questionnaire used in this study has potential to make a valuable contribution to the evaluation of corporate education programmes within contemporary business organisations. It is aimed at multiple stakeholders, it is strategic in nature, it provides a useful gap analysis between expectations and perceptions and it can be used as a diagnostic tool to improve corporate education programmes part-way through their life-cycle.

#### **7.4.3. Postscript**

The vision of this research study is that the research presented here will act as a catalyst for further investigations of expectations and perceptions of service quality within a corporate education context. As T.S. Eliot once wrote:

*“What we call the beginning is often the end  
And to make an end is to make a beginning  
The end is where we start from”*

Eliot (cited in Trafford and Leshem, 2008, p12)

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## Appendix 1

### Stage One - Interview A (Pilot) L&D Manager Regional Hospital – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	I think for me, the drivers of the organisation were that we had projects that we needed to work on and it made more sense to have people working collectively on the projects, receiving theory on how the projects could be undertaken and learning in a collective group, rather than sending one or two people off onto a course where they would have to work on their own. So, it was about more collective learning and putting that collective learning into practice through work-based projects. We were in directorates so it involved taking the expertise of people in the workplace and bringing learning to that expertise to take it that bit further. Sending someone off, they are just one person within an organisation but if you have got more people with the same goal it gives more opportunity for that goal to be realised and to get some positive outcomes from it, rather than a small drop in the ocean.	<p>Project outcomes</p> <p>Collective learning</p> <p>Contextualisation to organisational aims &amp; objectives</p>
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	From my perspective it was more about working with the university to tailor a programme that would meet the needs of the corporation. An open programme has generic components which can be applied to the workplace but in a corporate programme we could tailor-make it to our own business. If you sent 20 people to a generic programme, yes they could work together and they could learn a lot from the other people on that programme, but being able to work with the university meant we could tailor it to what we needed. It also showed the participants their worth and that we wanted to invest in them and give them something a little bit extra and to take on board some of their learning. We could then address it as a corporate programme together. Partnership working with the university was important. Otherwise the university would put the programme on but not have a sense of what the business was all about. Working in partnership gave us the opportunity to gain the theoretical knowledge, but the university could also learn about the business and the knowledge that we had. We could marry the two together to provide a richer programme for	<p>Co-design</p> <p>Contextualisation</p> <p>Partnership</p> <p>Two way process</p>

	the learners who were on it. The corporate programme helped us to have a more personalised approach. It was a two- way process rather than just a one-way. It created a dialogue between us as a business and you as a university. The university had to get out of it what you needed, such as the QA side, but we were also keen to be sure that we were getting something that could be used and built upon for the long term. The university has the experience of working with other sectors but we were coming with the knowledge of what the NHS. So, we gave you the corporate knowledge and you gave us the theoretical knowledge with the concepts that we needed. We could give you insights that you could then share with other people. It involved marrying the two together.	
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	An open programme is about going online or looking at the prospectus and this is what the programme is, this is how it is broken down and this is what you achieve in the end. With the corporate programme we could come to you and say 'this is what we want' and that is how it could be tailored. Our expectation was to have an MA which is work-based and involved flexible learning, such as the action learning. We couldn't change what needed to be achieved by the end to gain the qualification, we could affect how it was achieved and it could be more flexible to change it. There was the opportunity for dialogue. We could review it as we were going through. So, our expectation was that we could make it what we wanted to be provided that we achieved what the university needed us to meet in terms of outcomes and processes. But if we had sent 20 people on an open programme we would have had to have followed what was given to us and wouldn't have been able to flex it to our needs. It would have been more fixed.	<p><b>Contextualisation</b> Work-based <b>Flexibility</b>  Monitoring student progress</p> <p>Open programmes more rigid</p>
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	I was a student and a member of the L&D team. As a student I hoped it would get me an MA in the end. I have been in a training post for a few years now and have gained a lot of experience by osmosis and have been exposed to opportunities I have had. I wanted the MA to formalise that knowledge. Did I have it right? Where were the gaps in my knowledge? Experiential learning can be very different to theoretical learning and I wanted to close that gap. Actually, even having done the MA, you can never stop learning either through day to day learning or through books. I wanted the programme to formalise some of what I thought I knew, but I also had the expectation that I wanted to be stretched academically myself.	<p>Academic success  Academic credibility Plug gaps in knowledge</p> <p>Stretch academically Lack of confidence in study</p>



	<p>Could I achieve it? I wasn't sure I could study at this level. It felt quite intimidating at first. I wanted to close the gap in my theoretical knowledge and match it to my experiential knowledge. Also, I wanted to gain experience from a sector that was not my own. I felt my own base was very limited. I wanted input from experienced lecturers and mentors from outside the sector. I wanted a widening because I thought that I had quite a closed knowledge. Also, when I talk about leadership or teach it, I wanted to have some credibility behind what I was saying.</p>	<p>Theory into practice Gain knowledge of other sectors Lecturer expertise Credibility</p>
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	<p>We came to you with a vague idea of putting something together and the key issue was 'how will we put this together operationally'. Our director had the vision but we had to turn it into reality. We came to the university with ideas that we wanted to throw around. How could we create an MA together. It involved building up a rapport and I had to work with academics that I haven't worked with before. I believed I would lack the knowledge to work with them, so that was a huge step for me because I had to understand quite academic talk and then translate that into 'how are we going to work that operationally'? As the partnership developed it became easier for me to do that. It was important for the university to be able to respond to the level that I was at and I needed to know what the university required of me. The programme allowed us to offer a full portfolio of personal development from a non-academic route to an academic route, from level two, basic numeracy &amp; literacy, to an MA. So, anyone coming to work for this organisation could achieve quite a high position that is underpinned by theoretical knowledge, as well as experiential learning on the job. I believe that we have that portfolio that we can offer now. We have that full complement of learning. For those who were at the top of their profession clinically, we could offer them the development for their leadership and management so that they could achieve higher things within the organisation if they had that aspiration to be a general manager or associate director. Also, as an L&amp;D team we expected to gain credibility. It gave us credibility with regulators and to showcase that leaders were gaining some learning and that we could provide that. They would see we were taking that seriously and valued the individuals to be able to offer this. This type of learning comes at a cost and we were willing to invest to take the organisation forward.</p>	<p>Co-design Partnership Lack of confidence in use of academic language University support Succession Planning Full L&amp;D portfolio Theory into practice Talent pool Sector Credibility Valuing of individuals Return on investment</p>
JS	Q6. What did you expect the corporate education experience to deliver for the organisation	

	as a whole?	
Respondent	If we were to invest in people taking this kind of corporate programme, the organisation's expectation is of return on investment through work-based learning. They would want it embedded within the organisation. They would have the expectation that the knowledge is put back in and taken to the next stage. They would want to see some outcomes of the live projects and from the projects that did get done, they did move the organisation forward and there was some return, whether through money or improved quality processes. Some of that is happening.	<b>Return on investment</b>  Theory into practice Project Outcomes
JS	Q7. What were your expectations of the university?	
Respondent	I expected that they would be able to take a loose, vague idea and turn it into something that was deliverable. I would expect that they would ascertain what we were trying to achieve and make it possible. I would expect they would take the experience that they have had with other organisations and bring that together for us. I would want them to provide a quality programme that would meet any QA processes. They would know and have the infrastructure to meet what was required from their perspective. I would want them to work flexibly to deliver a programme which while it needed some structure, that it was moveable. Also, that there would be effective communication between us and that we would get to the desired outcome of getting staff to achieve the degree. Also we hoped they would provide lecturers and resources that were of a standard to meet that. I would expect that they would be gentle with us! They needed to realise that many of us as students didn't have a first degree and there was a lot of trepidation from the learners. We wanted the university to take time to realise where we all came from and find a base level from which we needed to move up from. That was going to be incremental and not be at Masters level immediately. We all had different levels of ability, so it was important that time was taken to bring us up to scratch.	Co-design <b>University support</b> Experience from other sectors Quality, robust programme  Flexibility Good communication Lecturer expertise Learning resources <b>University support</b>  Understand needs of delegates
JS	Q8. What were your expectations of the learning & development team?	
Respondent	We expected them to give support. We wanted them to ensure that the course ran in a formalised way and to be the middle person between the university and the organisation, so that if there wasn't someone at the university that they would be a port of call and a buffer. They wanted someone local to sort things out for them rather than someone who was removed. They wanted a supporter locally who could provide information or who would know where to get it. I would expect them to have the knowledge of how the course was	<b>Organisational support</b> Wider connections  Answer student queries  Knowledge of the course

	going to be run and what was expected – to have more knowledge of the course than the learners.	
JS	Q9. What were your expectations of the line managers?	
Respondent	I would expect them to provide support, mentorship and guidance to the students. Also that they would ensure that the students were given the time and resources in terms of paper, or help to speak to other people so that the projects could happen, and to make sure their staff could deliver on the projects themselves. Whether that happened is open to interpretation but that would be my expectation. I expected my line manager to discuss whether I was on track at my monthly 1:1's, to find out how I was doing and that my outcomes were being met and that he was getting his return for allowing me to be on the course.	<b>Organisational support</b> Mentoring Provision of time & resources Foster wider connections  Monitor student progress
JS	Q10. What were your expectations of senior management?	
Respondent	The senior management agreed the programme initially. My expectation was that they would provide mentorship, they would provide an open resource point if that was required, that they would take an interest in the projects, because there was a lot of investment going in to the programme. I would expect them to want to see an outcome from the programme and, in terms of moving the organisation forward, they would want to see that the students were developing knowledge that they could put back into practice into the business objectives. I expected that they would have a close input. Because the university were providing the theoretical input, I would expect local senior managers to provide the organisational input so that the two different views could be brought together. They could explain what the practice is like here and then this could be combined with theory from the university.	<b>Organisational support</b> Mentoring Provision of time & resources Interest & encouragement Monitor student progress  Provide organisational level input
JS	Q11. What were your expectations of yourself?	
Respondent	As a student my expectations were that I would be conscientious enough to take on board the learning and to be able to translate that into a piece of work that would pass. I expected to fully participate in the learning and give something back to the organisation. This meant full attendance, assignments being given in on time, having a mentor, keeping my manager informed.	Conscientious approach Academic success Full participation in learning Punctuality in assignments Networking
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	At the time they felt very realistic. With hindsight, my expectations were slightly unrealistic. They were too low. I needed more confidence in myself as a learner. I was honest about my lack of confidence giving presentations. I was more realistic about what I had to do to	Unrealistic – need for more confidence Realistic about practical role

	<p>achieve, such as turning up and therefore my expectations changed slightly as I went through the programme. If I did a course now I would come at it with different expectations. As an L&amp;D manager, my expectations of working with the university were realistic. The unrealistic part was in terms of the time it would take to bring the programme about, and the vision we had of having a portfolio of learning that everyone could buy into. We were unrealistic or naïve about whether the organisation was ready for it. So, it was a bit of both. We were realistic about what we wanted to achieve out of it. Unrealistic about the timescales, the buy-in and that everyone could see the vision of what it was about and that it could be achieved.</p>	<p>as a student</p> <p>Realistic about working with university Unrealistic about the time needed for design Mix of realistic &amp; unrealistic</p>
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	<p>Other stakeholders did not buy in to the whole MA programme at that time. We were under scrutiny at that time about one month after the course started and the attention of the senior stakeholders was elsewhere. We were going through crisis management. We were being very reactive. As students we didn't have time to see what they were doing. My expectations of senior managers and of line managers were not met at that time. Senior stakeholders would expect people to turn up to the course and put things into practice. As a learner my expectations were more personal but there is some similarity in that we also want to put something back in. But there was a gap. As a learner the knowledge wasn't there in the beginning to say I will make a difference. The senior stakeholders would have been much wider and more strategic. Students' expectations were that I would learn something and put it into practice and help the organisation to go forward. The senior stakeholders thought more strategically and wanted the programme to achieve organisational goals. Their expectations were at a higher level of outcome. They were similar, but they may have expected a more rapid return on investment. Theirs were at a higher level. Maybe as well, their expectations were not articulated because they didn't know what their views were of the programme. As a learner I didn't think at the beginning about what would happen at the end of it. I am not sure they thought about their expectations either. They were more removed from it and didn't get involved enough because of what was happening in the organisation. When the senior stakeholders were brought into the learning environment we didn't get that drawn out of them. They missed an opportunity to realise what their expectations were. As learners our expectations were</p>	<p>Senior staff with unclear expectations <b>Theory into practice</b> <b>Return on investment</b></p> <p>Delegate expectations more personal <b>Return on investment</b></p> <p>Senior staff expectations not understood or articulated</p> <p>Delegates expectations more clear <b>Theory into practice</b></p>

	clearer. They were to gain knowledge and experience and take that beyond the programme. The expectations of senior management were not articulated to us at the start. We didn't ever get that clarified from them.	
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	<p>It varies. From a senior management perspective, those are important because they are allocating resources to it. They will want some return on that. They have put finance to it and time away from the workplace to it, so their expectations will need to be met. From a learners' perspective, they are also important. L&amp;D expectations are somewhere in the middle. We want to be able to deliver what the organisation wants and also want the individual needs. We sit somewhere in the middle. Our expectations are important to us and we have two masters we have to answer to, the organisation and the learner and each are important. The organisation pays our wages! You could say therefore that the organisation is more important because they want to see that the investment they have made is actually worth having. As a L&amp;D team, if we don't meet the learners expectations they won't come and we won't have work so equally they want us to deliver on their expectations otherwise reputation. Otherwise they could walk with their feet and not come back. So, you are sitting in the middle of these two. In terms of which is more important it depends on what you are trying to do. If I take the MA it is going to be equal. We had to play to both equally. I think that the expectations of the university and of the L&amp;D team were of lesser importance than those of the learners and the senior team.</p>	<p>Provision of time &amp; resources</p> <p>Delegate expectations also important L&amp;D expectations important</p> <p>Return on investment</p> <p>Senior staff and delegate expectations more important than L&amp;D or university</p>
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	<p>(a) We need to see a return for our investment. If they are investing resources into the programme, they want to see an outcome.</p> <p>(b) The partnership was able to deliver what it set out to do</p> <p>(c) The learners would be committed to seeing it through to the end. They would be the right people for the programme at the right time for the right reasons, not just because they fancied doing it. Selection is important.</p> <p>(d) The learning that is acquired is utilised and is ongoing. When we finish the course it will not be just a short term gain but something for the longer term. Nothing should be lost.</p> <p>(e) The line and senior managers keep a close interest in what is going on, so that they understand what learning is coming out. They should continue to see the learning in</p>	<p>Return on investment</p> <p>Partnership Selection</p> <p>Theory into practice</p> <p>Organisational support Theory into practice</p>

	practice. They should see it embedded in their peers. The knowledge should be disseminated. That is the responsibility of L&D to see that knowledge and skills are disseminated vertically and horizontally. So, they must walk the talk.	
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	As a learner expectation is more important than investment. The investment for the learner is coming from the organisation, so they are not so concerned about it. It is expectations that need to be answered for them. From an L&D perspective our expectations are also important and the investment comes from putting something back into the organisation. From a senior team perspective, they are concerned about investment. They wouldn't think of it in terms of expectations. It's more the physical stuff they can get out of it. They would be thinking 'I have allowed you the money and time to do the course, what are you going to give back to me in terms of saving me money or improving quality'. That's where I think the senior management would come from. I think personally that expectations is a better way of looking at things because, unless you are selling something and you can get a monetary return, in the type of work we are involved in, to demonstrate a return on investment is quite hard if you are looking at it in monetary terms. It is easier to demonstrate a return on expectations. It is more do-able. But senior managers would talk about return on investment because that term is more widely known than ROI. If you ask a learner what the return in investment would be for them, they would find that harder to describe. They would find it easier to describe how they got a return on their expectations. For L&D it is probably a bit of both. But I still think overall it is easier to demonstrate ROE.	ROE more important to delegates L&D concerned with both ROE & ROI Return on investment  ROI hard to quantify ROE is more straightforward  ROI better known concept than ROE Overall easier to demonstrate ROE
JS	Q17. As this is a pilot interview, were there any questions which were leading or unclear or unhelpful? Are there any ways in which the interviews could be changed for the future?	
Respondent	It was a very relaxed interview. It was helpful to be reminded of the questions at times. The questions followed a logical order. They built up, one upon another but we closed the loop on where the questions were going. You did correct me if I was going off tangent. You gave me the opportunity to think and to articulate and link back to what I said earlier. I didn't feel you were rushing me. There didn't seem to be any leading questions. I felt I was given the opportunity to say whatever I wanted to without being pushed in any particular direction. I did feel that some of the questions were quite similar and we were in danger of going over the same ground at times.	

## Appendix 2

### Stage One - Interview B Senior Manager Regional Hospital – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	<p>That's a good first question. Our whole training &amp; development portfolio was in development and we were moving from a series of programmes and interventions that we had put together which were identifying management competencies towards external moderation, using ILM and other organisations as part of that process. But there was nothing we were offering which took leadership &amp; management to the next level. There was always a notion that leadership development was needed from some levels of staff but if you wanted something more theoretically demanding you would have to go to the Kings fund or somewhere else, but it would cost a lot of money because it was by an esteemed establishment. There was a notion that just sending people off on things would not be too helpful without having some control over what was happening because up to that point we weren't sure who had a Masters and what it was in. There was no database. One notion was how do we get a rigorous programme at a higher level that is more internal than external. Another strand was that we used a couple of universities for professional training and our local university was sitting there with an international business school so why on earth weren't we tapping into it. Why do we send people away when there is expertise just down the road? I have always been interested in the interface between educationalists and the service. The two don't always rub happily side by side. The other thing was that most people in the health service come through two routes: there are those that are assigned to go into management from quite early on and they go down a route that is more management than clinical that may involve a management development programme. But most people within the health service are clinicians first and foremost and come into management because it is an expectation of the job rather than because that is what they want to do. And therefore there are different expectations and demands upon them. It was a way to bring together a whole range of thoughts, something that would make sense to someone who hadn't gone through the management process. I came through the clinical</p>	<p>Succession planning Contextualisation to organisational aims &amp; objectives</p> <p>Programme for top-end leaders</p> <p>Corporate programme provides control</p> <p>Academic credibility</p> <p>Partnership</p> <p>Programme for clinical &amp; non-clinical routes</p>



	<p>route so that was the general thinking for the programme. Within that, it was about how to make sense of an organisational process that doesn't really recognise postgraduate programmes. It's not about 'you have to get a degree to get a job'. Very few jobs in the health service designate that as a requirement. It's coming on more now, but they are not regulations that you have these requirements. I wanted to get the organisation to recognise that if you want professional managers and leaders you have got to give them a professional development framework to develop within and this was part of bringing the trust into that kind of realisation. And the practicalities of that is that we can't afford to send people out on these programmes for hours and days on end so it has to be accessible and make sense. So, there were a whole range of things that were in my mind as to why we should set this up and it was up to me to make the case. Which of course, we did, but it was about a two year process as I recall. That was my thinking in why it should be set up. It was suck it and see as I had no idea how it would work out.</p>	<p><b>Career development</b></p> <p>Accessible, local programme</p>
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	<p>Part of it might have been selfish from my own point of view. I knew that I would be asked to demonstrate what the benefit would be and I wasn't too sure who the candidates would be and I wasn't sure.....you have good and bad departments within hospitals and universities.....I was picking up a sense that MBAs are MBAs. What is the expectation of someone coming out at the other end? What is the investment and you can spend a lot of money on these things. We had no record of even tracking who went through these programmes let alone demonstrating that the organisation had got something back afterwards. I thought, if we go down that usual route it would be....are we doing it because it will benefit the organisation or are we doing it because of someone's career path. What was in my mind is that if you send people away on an MBA you get what you have always got but if you get an organisational handle on it is better. I was working on the idea that work would be on everyone's mind the theory and academic work would add richness to that but it would be the work that the organisation would see and the output and maturity of that. People would see the qualification as a by-product rather than as a means of getting an MBA. This seemed to have greater resonance and richness for the organisation, knowing that we were going to have to stump up a reasonable amount of money to get this thing on the road. Are we going to set a precedent by saying that all our band X's have to have a</p>	<p>Uncertainty about the value of open programmes</p> <p><b>Return on investment</b></p> <p><b>Contextualisation</b></p> <p><b>Theory into practice</b> Qualification as a by-product of a rich learning experience</p> <p>Control of costs</p>



	Masters degree, which is always a dangerous road to go down as that can escalate your costs almost out of control and one of the issues for an organisation like ours with 4000 people, if you are going to have a personal development plan worth their salt, it will ratchet up the bill and if you are going to pay £10,000 for one person the question is why are you doing it for them and not for others. So, a range of things really.	
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	My expectation would be more control over what the programme was about. And that would be chief, because looking at a prospectus you never get a clear idea of what it is about, eg. there will be project work in it – what's that? How do you know that the project will be useful to them? At the end of the day, our folk have got a job to do which is a big task these days. I couldn't see a way of being able to fit everything in and have the programme miles away. It was proximity, it was an understanding that we had an opportunity to change things. I had no idea how this would work. We were looking at a model that used part of my team to make it happen and that was a concern. If people are coming on the programme from far away it is not helpful, we can get people together and deal with current issues. The notion of ownership and partnership was important. That goes back to my feeling that all for all clinical issues to be linked to education, partnership was critical. I didn't think you would get that by sending people away. They would disappear off your radar. And also how would you deal with....is this about individuals or is it about teamwork...because we did encourage groups of people to apply, which was novel in itself I think. That would aid the project work and that was what would make or break it. So, that to me ticked all the corporate boxes in a time when there was money around but it wasn't there to be thrown around.	Co-ownership  Proximity & accessibility  Co-ownership Partnership  Team-building Collective learning Project work
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	That's a difficult one. For this particular programme it delivered my vision – a clear idea of what I wanted. It was part of a picture...one of the final pieces that gave us a portfolio of development with a team that would deliver it in partnership that would meet the needs of the organisation and would justify the ten years of effort that I had put in. It did all of those things. If people asked 'Is there anything you would do differently?' I would say no, because what has actually come out of it has been right....part of what we are about as a raison d'être. It put back some of my faith in this notion that we have two sectors trying to deliver healthcare. One is us as a service and one is you as education providers and it was a belief	Talent pool       Co-delivery

	that we really could put something together that had value and would work. That's what it did for me personally and I suppose that because I hadn't gone through academia, to watch others benefit from it was a huge plus. It's been a joy watching people grow and develop I would say I have seen the programme make a real difference. So I had a mixed bag of expectations and I think the Trust couldn't argue with what they got.	Seeing others grow & develop
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	<p>The first thing for me was that the staff training &amp; development team were developing. We had taken them along quite a road from the concept of internal training to a bona fide education provider. I had the confidence in the team that they could do that. But primarily, we had to have confidence within the team. If we were going to make this work we had to have someone on the inside and Jayne was the perfect candidate because I had recruited Jayne some years previously and I could see what she could be with a Masters programme behind her. Because she understands all the action learning etc. and to have that built in and have a team with her of senior managers was a rich bonus for me because I knew that she could take the cohort with her. My expectations of Jayne helped to understand what other managers expectations would be of their staff who were going on the programme. So, it was put your money where your mouth is and as you know, it worked out, and I had every confidence that it would. But it was an interesting process and a high risk strategy without a doubt. It was fortunate that we had one or two other members of my team involved. I had a staff development team and a research team who were mature enough to handle questions that we couldn't have foreseen at the beginning. And we had the relationship with the university so if we got into trouble there would be extra support. The confidence was there in the partnership. If you've got that then everything else works. You start these things off with a not totally clear view of what you will meet along the way and what I didn't want is five or six people dropping out. I knew that we might lose some straight away but we needed to hold a good cohort through it and that would be tough. We couldn't afford these people to fail. We had to make sure that the support was there so that they had every opportunity to be able to deliver. That was important. The action learning had to deliver, everything was important when things were going bad. The Trust went through a difficult time the pressure was immense and the MA could have been the first thing to go. It was vital to know there was a good support structure, the notion that everyone was in it together and the idea that it</p>	<p>L&amp;D manager joins the programme as delegate</p> <p>Organisational support Answer student queries</p> <p>Partnership</p> <p>Selection</p> <p>Action learning</p> <p>Organisational support</p>

	was a good programme. I think that was important. The team could see the value of it, they could see that it would make their work better. Accessibility was part of that. The university was only 15 miles down the road. That made all the difference. Whilst the academic was secondary to the organisational point of view, as it turned out the marks were good.	Accessibility
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	I expected that the organisation would see a change in behaviour in a group of people and they would then say this can be rolled out. This was the final piece in the jigsaw of development that we were giving the organisation. Whilst it wouldn't be there for everybody, it would be there for some and people would see the value of that. All things being equal they will have done. But things weren't equal as it turned out and the service took an unexpected turn. One of the things that affects our expectations is that whatever you do in terms of leadership and management it is not a quick fix and you only need blockages above or below and people are left high & dry. Things can crumble with all these outside influences and these started taking a hold. So, if I ask what these people got out of it, there would be mixed reactions now. Individual managers might say this was really good career development others might say they have been banging on about doing something for 5 years and this didn't hit my budget and everything in between. But the Board were always supportive but survival became the name of the game. I think the Board had enough positive expectations to agree the programme and that it would be project based. I think the non-Execs got it better than the Execs did. The expectation was that the organisation would be seen to be operating in a better way....whatever that means. That's generally the expectation. Whatever intervention you are giving someone, you want to see some return. What the return is, is anyone's guess.	<p>Changed behaviours</p> <p>Environmental impacts</p> <p>Career development</p> <p>Organisational support</p> <p>More effective organisation</p> <p>Return on investment</p>
JS	Q7. What were your expectations of the university?	
Respondent	That's an interesting one. I think the expectation of any university is that they are experts in their fields. That's my starting point. Over time that has been dented, not through the universities fault, I'm talking about universities in general, I think that universities are doing things that they have no business to do. I am not sure we need so many people with degrees. I still think of universities as places of academic rigour. I am not sure where vocational training fits into that and I am not sure we have done nursing a great favour by turning them into reflective practitioners. They don't always give the care...they have lost a	<p>Lecturer expertise</p> <p>Academic credibility</p>

	<p>lot of practical stuff. But for this kind of programme, this is where universities shine and the university did shine. I think they delivered exactly what I expected - the academic rigour behind the gut feelings that we all have about how things should be done. Plus academic ideas that made sense to everybody. Students can see why they are doing things and now they know why. They can build on that. They won't ever forget that. Part of the skill of a university is to translate gut feelings into something that made sense and was not academic gobbledegook and helped everyone to get out of it what they wanted. People could understand what was being taught, it could be sold to the CEO easily and it could be sold to candidates so they understood it was about 'you get out what you put in'. For those who put in the extra they could see what they were getting out of it. It was important that people were stretched in terms of intellectual rigour. A Masters degree is a good thing and it should have a certain level to it. I expected the assignments to encapsulate what they were doing but take it to an academic and intellectual level that was stretching. They had to see that academic models were well-tested, they had to understand what research involved. The research side came as a shock to people and that was good. I wanted them to know that it would be two years of hard work and that the Masters was worth the paper it was written on. The university staff brought a recognisable difference to the programme.</p>	<p>Academic rigour</p> <p>Theory into practice</p> <p>Stretching assignments Academic credibility Input on how to do research</p>
JS	Q8. What were your expectations of the learning & development team?	
Respondent	<p>My expectation was that come hell or high water they would manage the process. My worry was [L&amp;D manager], that she had to do the work and managed the programme. She brought richness to the programme. Her role was as a leader but also as one of the troops. Everyone understood that. I expected the rest of the team to support the rest of the work. The majority of the team realised that by supporting [L&amp;D manager] they would enrich their own role. The team itself grew because it was taking additional work but they could see that it would benefit them too. They were all growing through the process. It seemed to work. People then realised the purpose of what we were about. It was about taking people forward in an organisational context.</p>	<p>Management of course logistics</p> <p>Supportive Co-learning</p>
JS	Q9. What were your expectations of the line managers?	
Respondent	<p>My expectation was that line managers would give support and that they would give mentoring and coaching support and generally be engaged in the work that their people were doing. That was my expectation and that was slightly higher than what actually happened. It was difficult because of the time we were in.</p>	<p>Organisational support Mentoring</p>

JS	Q10. What were your expectations of senior management?	
Respondent	<p>We were very keen to get them engaged in the process whether it was in mentoring or directly through input, giving their views on what was actually happening. Their perception of leadership was important. In the event we didn't use their expertise as well as we could have done. My expectation of the Execs went straight down the tubes. I thought naively that they would come to the discussions of their perceptions of the challenges of leadership and we got a very guarded response – the party line. I expected them to open up and say 'being a CEO is very difficult' and 'this is the impact on my life' and we didn't get anything useful. I don't expect senior management to be involved in the nuts &amp; bolts, but in this case as we were doing something new I felt they should be more involved than they were. The programme has been knocked on the head for now because of money. It wasn't really a Board decision but more to do with the environment. The MA was possibly a step too far in their understanding.</p>	<p><b>Organisational support</b>  <b>Mentoring</b>  Senior staff engagement lacking</p> <p>Honesty regarding leadership in the organisation</p>
JS	Q11. What were your expectations of yourself?	
Respondent	<p>I expect to provide a system whereby I can confidently offer training &amp; development opportunities to 4000 staff. I have to put the pieces of the jigsaw in place to make that happen. I don't get prescriptive and say you must do this. I make things available and say 'this is what we do'. If you don't like it, put something else in place. That's the kind of attitude I take now. We are doing a lot of work with the wider NHS community in our area and the next MA will probably involve a wider range of organisations within the region. If you get managers getting together from different parts of the system and working on a common problem, that is the way forward as I see it. It involves problem based learning but brings in the academic rigour. We are really getting into the leadership agenda. We could do more on psychology and what leadership means in the public sector. We could look at the fire service and other public sector organisations. My expectation is that the MA will fly again but will fly across the sectors.</p>	<p><b>Talent pool</b></p> <p><b>Sector credibility</b></p> <p><b>Theory into practice</b></p> <p><b>Sector credibility</b></p>
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	<p>In terms of the performance of the people I think my expectations were higher than what actually happens. As an educationalist I have to believe that interventions have a positive outcome and I am sure that they did, they had a positive outcome. Whether it was their own self-esteem or confidence, or doing a better job, whatever that meant. The expectation of the organisation is that we will somehow be seen as getting there and create good leaders.</p>	<p>High</p> <p><b>Improved staff motivation</b></p>

	Getting there means improved performance, improved morale, improved everything, better patient care, happier staff. We are saying that all of these interventions are part of a bigger picture. But that doesn't get you next year's budget. Its also about ticking the CQC's box on learning and staff development. The process of selling this programme was no different to selling everything else. Our expectation is that the Trust will go with whatever we suggest because until someone comes up with a better alternative they have no choice.	Return on investment Improved staff motivation Sector credibility
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	I think we would all share the same expectation that we would see some differences in behaviour, attitudes or performance. Where we would differ is in what we would value those things as being. Line managers might have been looking for performance changes and been disappointed. That's a possibility. They might think I haven't seen any changes - that's a possibility. My view would be that the course has enriched them but not quite as visibly as we might have liked. But somewhere down the line it will come out. We are talking about leaders, who might change the culture. That's not a five-minute job. My own expectations were to have a more holistic approach. I am an eternal optimist and believe that interventions have a positive outcome. There must be a positive outcome. When it comes to measuring what that is, that's a whole different issue to the extent that is you are measuring performance, you can't look at that person in isolation, you have to look at their team, their situation and it might be might be that people have got to leave this organisation and go and work somewhere else where they are allowed the space and time. Maybe suddenly something they have learned will flower and you wonder 'why didn't it happen down there?' That is where all these difficulties come out about expectations. The only way that you can start looking at these things is taking one hard measure. Maybe they go on a course and come back and swing some particular deal and you think, there is a good return on investment. Now, was it because of that, even something as direct as that would be very difficult to confirm, but it is possible that this could happen. But most of the time it is just a belief.	Similar expectations  Improved staff performance  Long-term benefits  Optimistic expectations  Improved staff performance  Need for clear obvious measures Return on investment
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	Having spent 40 year in the national health service I have to say the most important persons expectations are my own, because if I don't believe in what I am doing then what am I doing. The thing about expectations, and it's a bit of a moral question, we don't really	Personal expectations



	believe in what we are doing. The expectations of the senior managers are paramount because they pay our salary. Whatever their expectations are and they may be unrealistic since they make people work all the hours God sends, if we don't fulfil their expectations whatever they are we are likely to find ourselves out of a job. I am forever reminding people 'whose name is on your paycheque?'. So it is about mixing your expectations with the expectations of the organisation. If the organisation is good they will marry to some extent. The more they match the better it is. The organisation is reflecting the staff and the staff are reflecting the organisation. It's a balancing act the whole time.	Senior staff expectations  Matching expectations
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Expectation that the programme brought out in all those individuals one or more major benefits to them which translated into an organisational benefit. This includes an expectation that the organisation realises that this benefit has happened. (b) Expectation that we can work together to produce something that is positive – the university and the health service. To come together to create something that is meaningful to both parties (c) Expectation that there would be boundaries around that that make it doable. That it is affordable, that teams would commit to it and that there would be a demonstrable partnership.	Return on investment  Partnership Co-design  Achievable Team-building
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	Return on expectations is good because it changes the value. It really does personalise things because return on expectations are subjective thing. Return on investment is seen as an organisational thing. How has the organisation benefited from this? But return on expectation is the myriad of 4000 peoples' ideas. Whereas, with ROI you may think money or time. I think return on expectations is good as it concentrates the mind of the individual in a way that return on investment doesn't. It brings more questioning at an individual level. For example, if you are talking about the committee chairman and ask them what their expectation was of the outcome of the meeting, before they went in there, I think you would get a darn sight better meeting than if you have the meeting and don't have those points of reference. I think it focuses the mind. Return on investment is something that is vague for the individual. It is an organisational thing, that doesn't have much personality to it so does it matter in quite the same way. You spent five thousand pounds on somebody and you	ROE personalises things ROE more subjective ROE relates to collective ideas ROE concentrates the mind & creates questioning   ROI is vague

	<p>don't get quite what you want. It's more of an impersonal concept and organisations have the expectations of all of their staff. Investment is about putting something in and trying to see what you get out to balance it. Expectation is about what you think and that is where I would make the difference. That brings in a whole range of factors that come in away from those harder things, such as behaviours, finance. Opinion can be a great leveller. Staff opinions may be different to what the organisation thinks. You may think that an organisations thinking is the sum total of what its staff are thinking but that generally isn't right. So, expectations starts to get to the nitty gritty of what you want. Return on expectations brings a more holistic view of the factors involved whereas Return on investment is more one-dimensional. Maybe we need both ROE and ROI evaluation. The balance in the past has been towards ROI but maybe this needs to be redressed by more emphasis on ROE. Maybe we should have a generic name 'return'. Some programmes may be better evaluated by ROE and some by ROI. Actually, I don't feel the need to justify everything in the way I once did. We are recognised as experts more than we were in the past. Senior managers listen more to us. We also had the university's backing which gave credibility. This has created more confidence in L&amp;D.</p>	<p>ROI is impersonal</p> <p>ROI is about what you get out</p> <p>ROI is about how people think. Opinions a great leveller</p> <p>ROE is more holistic</p> <p>ROI is one dimensional</p> <p>May need both ROE and ROI. Balance needs redressing</p> <p>Could use generic term 'return'</p> <p>Some programmes better evaluated through ROE and others through ROI</p> <p>Credibility</p>
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## Appendix 3

### Stage One - Interview C

#### L&D Manager Insurance Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	We were looking for succession planning in the leadership team. Current managers were too technical – they are loss adjusters. They didn't have experience of running the business. [Senior manager] is a loss adjuster and learned the beauty of management through his role. He talked to the HR Director because he wanted find emerging leaders. In the US we put on the Emerging Leaders programme, but we needed an MBA to create leaders of the future. We took people from a technical background and taught them leadership and management. The first cohort started 4 years ago.	Succession planning  Talent pool
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	One reason was cost. We wanted to keep everyone together to break down cultural barriers and break down silo mentality. We also wanted lots of attention to be placed on what [insurance company] wanted. We wanted to make things relevant to [insurance company] and get maximum return. The students would learn material related to what the business wanted. That's what the business was hoping to get out of it.	Cost Breaking silo mentality Contextualised content
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	We were hoping that the bespoke programme would be used in a collective manner rather than just individual. A bespoke programme might get 50-60% of the material related to [insurance company] rather than 20% from an open programme. Also we wanted private company learning rather than public sector.	Collective learning  Contextualisation
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	As an L&D team, our expectations were that the people selected would be fit for purpose and that material would be contextualised through assignments. We could get them to start assignments and finish them. We could get them to start the programme and finish it. Given family commitments and professional life, you can't get it right all the time – you will get drop-	Selection Contextualisation of assignments Few drop-outs

	outs. 70-80% of those that started will finish. Those selected needed to fit the profile. They may have to do much on their own initiative rather than being supported by their business units. Also at some stage in the future, after completion, the organisation will see some benefits, in terms of who can slot into leadership positions. We need to make sure that if they stay with the business, they can see the bigger picture and strategy. But currently no-one has got that far yet. People in leadership have been there some time. But we want to be open to the bigger picture and think about how to make the future happen.	<b>Return on investment</b>  Wider strategic perspective
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	Similar. We wanted to identify the leaders of the future. Rather than go outside and bring people in at great expense. Also [insurance company] were using it as a marketing tool, to show that [insurance company] take recruitment and training seriously. In the insurance industry we are setting a mark – what are we doing to develop staff. [Senior manager] wrote a couple of articles within the industry about the MBA. In the next couple of years they challenge individuals as to what they got out of it. But at the moment there is more emphasis on the finances rather than on HR and talent. After the MBA no further action has been taken to decide where to go from here.	<b>Career development</b> <b>Credibility</b> Sector credibility
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	To provide time away to attend the course, time off to do the study accurately and time to do well and finish the course. Although senior managers encouraged individuals, line managers didn't always support. I expected it to be challenging. I had done an undergraduate degree and professional exams, so I was not apprehensive. My expectations were managed from previous experience. But some who didn't have this experience would feel rather different.	<b>Provision of time &amp; resources</b> <b>Interest &amp; encouragement</b>  Expectations dependent on past academic experience
JS	Q7. What were your expectations of the university?	
Respondent	I would expect university staff to turn up on time and provide a comfortable environment. I would expect tutors to be fully engaged in the teaching experience and answer all questions. They should provide feedback on assignments. Two areas were poor. The selection of tutors made learning a more challenging experience for the individual. Also feedback on assignments was poor. Lecturers would give variable feedback. We needed all tutors to give the same level of feedback. Quality of feedback is very important.	<b>Punctuality</b> <b>University support</b> <b>Lecturer expertise</b> <b>Feedback on assignments</b>
JS	Q8. What were your expectations of the learning & development team?	

Respondent	There was the expectation that all the logistics of getting to the university would be sorted out. Also to ensure that all line managers are committed. Students should talk to the L&D team as any problems arise. Also, if the L&D coordinator has experience of being a student, that they will give the right steer based on their insider knowledge and experience.	Management of course logistics
JS	Q9. What were your expectations of the line managers?	
Respondent	You would expect the line manager to be fully aware of why their person has been selected and give them support for the course. Also to give the person a review on a quarterly basis about how they are doing. This hasn't always been the case. Students have got lower marks or dropped out because the line managers weren't involved. Line managers don't need to know the details of the course, but they do need to be a motivator. This is what we should expect. Line managers could also read assignments and give inspiration and ideas or praise, or ask challenging questions. I tried that with my line manager, but he wasn't interested.	Selection Organisational support Monitoring student progress  Provide motivation Feedback on assignments Provide insights
JS	Q10. What were your expectations of senior management?	
Respondent	None. Initially as a student I wanted them to support my application. After the course I hoped they would chat it through and talk about what I can bring to the party. It is not my case to tell them what to do. It would be good if they could slot people into positions within the company. Maybe we could shadow them in their positions and create a learning pathway. People need on-the-job training This could add value to their own roles. Senior managers have on-the-job experience but may not have an MBA. The buy-in to bring them in as guest speakers at the 3-day blocks is difficult, but for those that do it, they do a great job.	Organisational support  Shadow senior staff  Co-delivery
JS	Q11. What were your expectations of yourself?	
Respondent	My expectations are to make sure the experience is as smooth and painless as possible. It is to reassure them when they are down and give them a steer in their modules. It is to give advice, which hopefully they will take in a constructive way. Also to be enthusiastic and positive if they are not getting it from a line manager – this has happened. When they are in difficulties and in danger of giving up, my input has given them second thoughts.	Smooth learning experience Reassurance Enthusiastic Interest & encouragement
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	They are realistic. They are based on previous experience of being an undergraduate and on being on an MBA.	Realistic Based on previous academic experience
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	

Respondent	My expectations were different because we are measured on the success of people getting through the course. We are not involved in the finances. We help them take the learning and finish the course. Line managers look at it in terms of whether the person will take their job. Senior managers are concerned about who we will get for senior positions over the next few years. They believe that [insurance company] will be stronger for the future with people who have academic qualifications. Each stakeholder will look at it in a different way – but all have a part to play.	L&D focused on successful completion of students Line managers defensive re their own job <b>Career development</b> All stakeholders important
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	I believe the delegate. They are the ones setting themselves up for sacrifice away from the family. They are being prepared for leadership in the future. Business can't succeed without the people. Their expectations need to be managed and encouraged all the way through it.	Delegates
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Post MBA monitoring of staff – what they have gained, what they have got out of it and what they have brought to the party (b) Support of delegates by line managers over the three years (c) Monitoring the wellbeing of delegates by the L&D team (d) Having job security and career development	<b>Return on investment</b>  <b>Organisational support</b> <b>Career development</b>
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	I think it is better than just ROI because it looks at things from a balanced perspective. ROE looks at things from a qualitative perspective – what people are believing, feeling, and experience. It is real life rather than just numbers. Numbers don't tell you anything. ROE has more meaning to it. It adds to and supplements the ROI perspective. ROI is hard to measure from people's perspective, but ROE looks at what actually goes on – what is culture, what are the problems, what makes people tick. It delves deeper – tells you the truth about what is happening. I like the concept of ROE. It provides another tool in the business toolbox on how to improve and grow a business. But we must remember that ROE involves peoples' opinions whereas ROI creates facts. Caution should be used, but ROE cannot be ignored. ROE adds a different dimension – it can help to answer difficult issues. But shareholders will always look for ROI. But ROE is a useful perspective.	ROE better than ROI – creates balance Adds a qualitative perspective ROI hard to measure ROE focuses on culture & motivation – a deeper approach ROE focuses on opinions. ROI focuses on facts. ROI always preferred by shareholders

## Appendix 4

### Stage One - Interview D Senior Manager Insurance Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	There were two drivers. The first was that the Exec had reached the point where they were much more aware of succession planning. The business was growing rapidly and leaders hadn't had any real management development hitherto. I had recently joined the organisation and it was a definite focus for me. So, it was growing the business and leaders becoming more aware of the need for succession planning. Also, we have had the Emerging Leaders Programme in the US. But these were strange circumstances in that Atlanta wanted leaders to attend, without any clear selection criteria. So, people went to the US and were then told that their professional development would progress beyond that but nothing was provided. We had to decide what to do with them.	Succession planning  Career development
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	We looked at a number of different programmes including other external accredited programmes, such as ILM. We also looked at other external providers who were not universities. The corporate education programme was sold on the basis of contextualising the material and focusing on things that were important for [insurance company]. We wanted to align theory to practice. Open programmes are more challenging to make it apply. From a [insurance company] perspective, we call it the [insurance company] MBA – our clients in the insurance sector recognise that our staff members have been through this programme. It shows that we are at the top of our game and have an edge over the competition. From an internal perspective it has been exceedingly well received and has promoted retention.	Contextualisation  Sector credibility  Edge over competition Promotes retention
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	That's definitely around contextualisation & alignment of theory to practice. Also it provides the opportunity for people to work within their own area, the [insurance company] four walls	Contextualisation Theory into practice

	which is a safe environment. There is much more opportunity to be open and discuss frustrations and challenges. Also we have seen a significant return on the team-building component. Corporate programmes deliver this better. We face a very siloed business environment. The programme has helped to break this down. Also the corporate education approach helps to tailor the material to [insurance company] and use examples from the business.	<b>Collective learning</b> Team-building Breaking siloes  Contextualisation
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	I see the university as being a centre of excellence and a leading edge entity. I was personally interested in learning how leadership development might be done differently. It's good to be exposed to other learning professionals. My own experience has been limited – through CIPD and an HR Diploma, but I hadn't worked with a university from a design perspective. I was interested in design and delivery and what was leading edge. I think for me the ability to interact with the lecturers and refresh and update my knowledge was important. L&D needs updating. We all recognise the challenge of that.	Lecturer expertise Co-learning  Co-design  Theory into practice
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	The L&D team were thin on the ground. I recognised the need for a more structured development programme. We decided to start at the top end. There was a need to do something for top-end leaders especially those moving from lower to middle management. We had a crude competency framework and an emerging leaders programme. We then said, how does the university fit in with the competency framework. The university fitted the bill. L&D wanted to see a programme that would fit these competency areas. We didn't do any more robust analysis than that. Our ability to input into the content from the L&D perspective was important. We wanted to have dialogue with the tutors and to be positive that the material would be beneficial. In terms of arrangements that has been appreciated. We realised we would have to work within the university constraints but that we could contextualise assignments. In terms of evaluation we would like to have explored this more. University feedback sheets are fine but we don't always receive them. We understand the constraints. At the end of a year it would be good to have feedback on the experience and think about improvements for next year. The university could drive us harder on that. We did it once but haven't picked up on it since. In terms of delivery we have generally had good tutors.	Talent pool Contextualisation to organisational aims & objectives Co-design Dialogue with university tutors  Contextualisation of assignments Feedback on course progress  Lecturer expertise

JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	A lot of senior managers didn't know what to expect. They started well. They hadn't anticipated the value of networking and the team aspects. They appreciated it more when they received feedback at the graduates event.	Team-building Networking
JS	Q7. What were your expectations of the university?	
Respondent	I expected the university to deliver a professional leading edge, top-notch programme and to see us as an important corporate customer. They should also consider our needs as best they could. They needed to be cognisant of the delegates and their roles and the pressures that they are under. At the same time the programme needed to be robust. The programme needed to be managed as a B2B relationship. We were hopeful that the lecturers would be able to get their arms around [insurance company], understand some of the challenges we face. We also hoped they had business experience, rather than junior lecturers who had been in teaching and had not got out into the world of business. We wanted tutors who were appropriately experienced.	University support Knowledge of organisation & sector  Contextualisation  Theory into practice
JS	Q8. What were your expectations of the learning & development team?	
Respondent	The L&D team needs to ensure contextualisation and to be there for the students and support them as best they can. They need to keep thinking continuous improvement and to keep doing things better. They need to promote the programme and to do better around evaluation and outputs. They need to ensure better value for the organisation.	Contextualisation Organisational support Return on investment Promotion of programme Evaluation of programme Creating value
JS	Q9. What were your expectations of the line managers?	
Respondent	They need to be aware of the individual participating in the programme and to give consideration to the fact that delegates are under pressure to get things done in their day to day business involvement. They should take an interest in what delegates are doing and support them as appropriate. They should give input on assignments as requested.	Understand work/study pressures Interest & encouragement Provision of feedback on assignments
JS	Q10. What were your expectations of senior management?	
Respondent	Again, they should be supportive. If there were business surges, they should allow the individual to continue on the programme. They should also be willing to celebrate the	Organisational support Celebration of success



	success of the people on the programme. They should also attend lectures and contribute as guest speaker input or on a 1:1 basis with the students themselves.	Attend lectures Guest speaker input Monitor student progress
JS	Q11. What were your expectations of yourself?	
Respondent	My expectation of myself was to succeed in making the programme a worthwhile experience which adds value to the organisation. Also, to ensure that individuals find it valuable and making sure it is right, from hosting aspects, to celebrating success, to the course itself. Above all I wanted to support their needs.	Create a valuable learning experience Management of course logistics Organisational support
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	They are realistic. They are based on previous experience of being an undergraduate and on being on an MBA.	Realistic Based on previous experience of HE
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	I was concerned with levels of expectation differing due to different levels of awareness. Senior management and delegates are not necessarily aware of how effective learning programmes are put together and how a days lecturing is structured. I was focusing on the whole process of the content and make-up of the programme. They wouldn't be aware of that. The delegates' expectations were probably all over the shop; many pleasantly surprised; some couldn't cope and dropped out; some concerned with what they will get out of it. There were quite a lot of variables.	Senior staff & delegates not aware of design of programme Programme design Mixed level of expectations
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	My immediate reaction is the students. If you can't meet their expectations, you won't get students on the programme. When you take people on there is a danger of a mismatch of expectations. If you can't match up the up-front expectation from an individual and organisational perspective, you will be in trouble. But organisational expectations are also important since they are sponsoring the programme and want return on investment. We didn't realise the significance of team-building and the breaking down of silos. How do you value that?	Delegates  Senior staff Return on investment Team-building Breaking siloes
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	



Respondent	<p>(a) An expectation that the programme will be a success for the individual and the organisation. This means applying the learning back into the business. Creating some consistency of thinking and being like-minded and therefore to apply theory to real business challenges.</p> <p>(b) Return on investment. We don't do it just for the fun of it. There has to be some sort of benefit for the individual and the organisation</p> <p>(c) An expectation that the content will be cutting edge. There will be university subject experts in both approach and content.</p>	<p>Academic success Theory into practice</p> <p>Return on investment</p> <p>Lecturer expertise</p>
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	<p>ROE might be simpler and more straightforward for the individual stakeholders to consider and rationalise their thoughts at the beginning, middle and end of the programme. Return is a difficult concept to get your arms around and over the years ROI has been difficult to quantify. ROE is altogether more straightforward, more meaningful. It is something that can be measured and something that stakeholders can relate to. It is an interesting and worthwhile angle. If we could nail it, we could demonstrate the value in a more meaningful way, which is better for all concerned. It may well drive more investment in L&amp;D. It might help people get it!</p>	<p>ROE simpler to rationalise thoughts at the start ROI difficult to quantify ROE simpler &amp; more meaningful ROE can be measured ROE might create more investment ROE might help people get it</p>

## Appendix 5

### Stage One - Interview E Student Insurance Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	[Insurance Company] sponsor the Emerging Leaders Programme and the [insurance company] MBA runs alongside that. It looks to identify leaders and successors for the future. Participants are identified through an internal talent programme which takes place in the US. You learn more about [insurance company] and how to understand the [insurance company] message. This is followed, back in the UK, by the [insurance company] MBA programme. Selection for the programme is done by company nomination. 12-15 students are selected for each cohort. Each person has been recognised as a potential leader for the future. I was asked to embark on the programme by our CEO. I was attracted by the opportunity more than anything else. I have been mostly self-taught in the past and the MBA provided an opportunity to formalise that with a recognised qualification and to embark on something that is prestigious and recognised by colleagues and senior management within the company.	Succession planning Career development  Organisational credibility
JS	Q2. Why did you decide to go on a corporate education programme rather than an open education programme?	
Respondent	I had never thought of going on an open programme in Higher Education before and had never thought about doing something off my own back. I never thought I was capable of it. It was only because it was presented as an opportunity that I thought “that’s a really good idea”. I remember my initial feelings about it were of being proud and pleased that I had been asked and recognised for my potential for the future. But I was also horrified at what the work would entail. So I really had to think about whether I could see it through and whether I would be capable and live up to expectations. The worst thing when you are sponsored by a company is if you failed in any way and let people down whereas if you are on an open programme anything can happen and you are only letting yourself down. My final decision to join was based on the opportunities presented to me for the future, whether that is with [insurance company] or beyond. The MBA is something that I will take with me	Opportunity Pride at being selected Concerns over workload  Concerns over failure  Portability

	for the rest of my life.	
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	I think, but I might be wrong, that the corporate programme is more structured. There are clear deadlines set by the organisation. With the corporate programme, there is a support network there, not only are they colleagues, but also friends. I didn't know half the people on the programme before I joined it and we forged close bonds which also helps in moving on in the company. You have a support network behind you which I am not sure you would have on an open programme. I found that support network invaluable, I have to say, from an encouragement point of view and sharing the pain. I also think that the programme is a more recognised thing in as much as if you are moving to another position, to say that you were nominated to go on this programme and sponsored to do it, backed by the company, gives you more credibility.	Corporate programme more structured Team-building  Collective learning  Organisational credibility
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	Opportunity, I guess. Opportunity that I didn't have before I embarked on it to open doors for me in my career. Something formalised and recognised and would help me progress through the company because of it and be recognised outside [insurance company]. Something that is portable. It's on your CV as an MBA and will be recognised by anyone.	Opportunity Organisational credibility Career development Portability
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	We were the second cohort to go through. The first cohort included support services. Corporate services often get squashed in a corporate environment; you are seen as an overhead. It helps to prove worth and credibility to your division within the company when we go into meetings and support the business. It gives you credibility. People do recognise the amount of hard work and dedication that goes into it and there is a certain amount of respect for that. My department boss helps to sell the programme within the company. I have been on a number of project groups within the department and I think the MBA has contributed a lot to these.	Organisational credibility  Recognition Organisational support Project groups
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	It is all part of succession planning. The Executive Leadership team sat round a table and said what happens when we retire or find other jobs. We realised as a company that there	Succession planning Career development

	was no succession planning at all. So, it was how do we identify who will be the next level for five to ten years time. Through the Emerging Leaders course and the MBA, everyone said what do we want from our emerging leaders, what do we want them to know. The MBA studies a wide variety of subjects to do with business, finance, planning etc. Doing the MBA helps you to understand these things and stretch your knowledge. Going up the ladder I am going to need that knowledge. So, as a company, it was how do we instil that knowledge and what do we need to formalise it. It gave an overview of business.	Theory into practice
JS	Q7. What were your expectations of the university?	
Respondent	I started out with no expectations or preconceptions. I had heard it was really hard work. It's quite hard to answer that question, because I didn't have any at the beginning. As things gathered pace, the tuition was quite intense three days for each module. I think what we were taught, the books we were given, the support from our tutors, the accessibility to the library were important. I am lucky as I live in Chelmsford so I have the university nearby. I had it easier than most. I left school at 16 and have never done any education like this so I did not know what to expect. As I was going through it I found the support really good. Some struggled with certain lecturers, but I didn't on the whole.	Hard work <b>University support</b> Lecturer expertise Learning resources
JS	Q8. What were your expectations of the learning & development team?	
Respondent	My expectation was for them to set out exactly what was required bearing in mind we all have busy full-time jobs. The programme is something you have to do in your own time and put a lot into it, but my expectation was to have the full support of the company. If you had to have study days, that would be supported. You were given all the right equipment to do your own course, the recommended reading materials from the training department, a list of books, some pre-work for the modules, some materials that gave you insight into the next module, for example. We had the title of the modules but it would have been good to have a two pager about the next module. The administration, booking the hotels and organising the preparations for the modules was good.	Clarify expectations  <b>Organisational support</b> Provision of time & resources Provide pre-work  Management of course logistics
JS	Q9. What were your expectations of the line managers?	
Respondent	That's a very interesting question. I did actually. I expected a lot more support that I did actually get. I would have expected to be given more time out if I needed it, even if it was as annual leave, especially while I was doing the dissertation. I had my own personal deadlines to hit and I didn't always have the time to stay up until 2pm in the morning if I was getting up at 5am for work the following day and then not get home until 8pm at night. I am	<b>Organisational support</b> Provision of time & resources

	not alone in that thought. So, more support with proof reading my assignments and sense check them. I would have liked more support on this from my line manager especially as the assignments were related back to [insurance company]. Maybe after each year we would be given some form of debriefing on how the course was going plus some questions as to how you found it and what can we do to support you through the second year. You were very much 'that's your choice to do it, off you go'. We were given the training days to do the programme but otherwise no other support.	Provision of feedback on assignments Monitor student progress
JS	Q10. What were your expectations of senior management?	
Respondent	We were told that our dissertations would be read by our Executive Leadership Team after they had been finished, so we all submitted our dissertations to them. There was never any feedback on those. Mine was geared around a specific project that we could have undertaken that would have saved the company money and it was disappointing that these weren't read through and we were given a chance to present on them. I would have expected them to evaluate the projects afterwards. When we chose our projects we had to submit the titles to our CEO and he would sense check them to ensure they are relevant to [insurance company]. They are paying for the course so they want to be able to utilise them. Nothing ever came of it which was disappointing. Support was there each year in that they would hold a ceremony and make a fuss of it. That was nice, but it felt flat at the end as they didn't use the dissertation projects. On the whole they gave us the opportunity to do the programme, which is flattering. They recognised our achievements each year.	Provision of feedback on assignments  Project sign-off Contextualisation  Celebration of success
JS	Q11. What were your expectations of yourself?	
Respondent	I am quite hard on myself, quite critical. I am a very organised, competitive person. Knew I would have to work hard compared to other people. My expectation was that it would be a lot of hard work for a long time. I expected that I would have to make personal sacrifices to do it. I expected that the outcome would be worth it in the end. That it would be a big achievement to me personally. None of my family are educated. Failure wasn't an option.	Work hard Personal sacrifice Personal achievement  Academic success
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	I was realistic in knowing that I would have to work hard and go through a lot to get there. But, I didn't realise quite how much I would have to do. There were a lot of weekends spent thinking 'what am I doing, I should be having a life'. I guess I underestimated the amount of work involved. I started work as soon as I started a module. Others left it until two weeks before. I set my expectations too low on that perspective. When I look back I enjoyed it but	Realistic about hard work Unrealistic about workload

	there was a lot of pain in it.	
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	My expectation now I have finished the MBA is that there would be something that would come out of it. Some sort of monetary reward or promotion or job recognition, which there hasn't been. The company expectation is a pool of people trained up to be leaders of the future, but my next step is HR Director but our HR Director will likely be in the job for the next ten years so there is nowhere for me to go. It's not just me – others are in the same situation. My role can grow internally which is fine but if you want that next step up, there isn't one. So, to utilise what the company have given me, I would have to leave. The company are not recognising that. I also didn't recognise that.	Career development Talent pool
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	I don't think it is a case of more important because everyone stands to gain something out of it. As a student I stand to gain from it. [insurance company] are gaining because they have a talent pool to choose leaders for the future. [insurance company] has a group of people who can think more widely about issues. Possibly me as a student, I stand to gain more as I have an opportunity to gain more through [insurance company] but also to possibly move elsewhere.	All important
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Expectation to be bolstered into the [insurance company] senior management (b) Expectation to have achieved something (c) Expectation of [insurance company] that they have a talent pool to choose from (d) Expectation of manager that she could talk to me about things that I wouldn't previously have understood. Now I have a wider view and am not so narrow minded. (e) Expectation that there is a pool of people who went through the same thing together. Expectation that these relationships will last for the future across the board and that we all understand one another's roles.	Career development Academic success Talent pool Interest & encouragement  Collective learning Team-building
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	It's very useful. My expectation was that the MBA would leverage me to greatness and it hasn't happened. It can make you feel very deflated and devalued, whereas from the company perspective that isn't the case. They have paid thousands of pounds, the business	ROE useful Delegate expectations not met

	<p>knowledge you have gained is extensive. But from a personal perspective you feel that after all that effort you want some recognition because of the blood sweat and tears. This expectation should be clearer. This failure to meet expectations can backfire on the company. I can't gain that extra responsibility so I will go elsewhere to get it. On the other hand I realise that instead of giving you a pay rise, they are giving you thousands of pounds in education. But at the end of the day I need to utilise it and that can cause a frustration. My expectation was that even if it wasn't financially recognised, with a pay rise, it would be recognised from a career pathway perspective. That is what is important to me. I would hope that there would be some formalised pathway set out for me to help me to achieve more, with potential milestones. It's important to set the right expectations. The company do recognise the achievement and they do value the investment. But they haven't managed to provide a clear career pathway.</p>	<p>Company should set right expectations</p>
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## Appendix 6

### Stage One - Interview F Senior Manager Luxury Retail Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	I think from my perspective it was about validating the training we do. I didn't think that we would get to degree level and when we met the university we were quite surprised. We wanted to send out a message to the organisation that the Sales Academy is a high qualification and get recognition for that. We are currently doing a big piece within the organisation on employer-brand and we wanted to get a wider message to employees that you can work and study here right the way up to degree level. The main issue was around the quality of what we were already delivering.	Organisational credibility  Increased quality
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	For us it was about the shared learning and the opportunity to co-deliver the training, based around our Sales Academy. There's not much out there in the sector on luxury retail. We wanted to know whether we could fit the programme to our needs and business and create a shared experience for students. On open programmes students are more on their own as individuals. In our corporate programme the students can share their hardships and they can build a relationship with the university. It's about the ability to discuss the course and, if not happy, we can adapt things as we go along.	Collective learning Co-delivery Contextualisation  Collective learning
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	As a business you would feel less engaged on an open programme. You get very little insight into the organisation and what they are doing. In the partnership approach we have fitted the programme to our needs. The only disadvantage of the corporate education approach is the fact that it is all about [luxury retail company]'s people and issues. On an open programme people can discuss different ways of doing things and you can learn from them.	Contextualisation  Open programme includes wider sector experience
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	



Respondent	For me, it is more part of what the team delivers, rather than about me personally. It's about validation. It also ties up with other HR objectives. So, it helped with internal communication on the employer brand piece. It enabled us to work collaboratively with others. It gave a great message for the resourcing team 'come and work at [luxury retail company] and get a degree in Sales'. Personally, it helps me demonstrate how L&D supports wider HR initiatives.	Organisational credibility Partnership
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	I remember the discussion we had originally, to get the programme to degree level. We restarted the L&D department in 2010, so it was part of that. It was easy to say to the business 'we deliver high quality training' but we needed a stamp of approval that it was at degree level. It gave us credibility. The L&D team have also grown and learned from it. They have learned more around the theory base behind Sales and from seeing other people lecture. We didn't realise these benefits at the start.	Academic credibility Co-learning
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	For me, it was around recognition and the quality of the work of the L&D team. It was also around [luxury retail company] branding and that we could offer an experience that no-one else offers. We wanted people to know that only at [luxury retail company] can you get this. Also, we wanted to grow the [luxury retail company] 100 super sales people – I still don't know whether we have met that. We already had a lot of amazing training opportunities for managers in [luxury retail company], but the entry level didn't have so much of a focus. This programme was for Sales staff. There is sometimes snobbery about Sales, even within [luxury retail company] – is it Sales or is it service? – it's both. But to offer it at degree level almost validated it. It demonstrates that Sales is vital. It is our bread and butter. It also shows that there is an art to Sales – it is a real skill.	Organisational credibility Sector credibility  Return on investment  Organisational credibility
JS	Q7. What were your expectations of the university?	
Respondent	My expectations were that the university might be rigid about the way a programme should be run. I was surprised by the flexibility and the desire to 'make things work for you' and that 'nothing was set in stone'. We would expect it to be a partnership and for the university to be supportive. In reality, the students have benefited from the support of the university. They gave help in selecting the right people in the first place. The fact that the university	University support Flexibility Partnership  Selection



	to make sure they don't drop out.	
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	For me it was about validating the quality of what we do. The Finance Director will always ask 'has it made a real difference'. I think differently. I see the benefits of publicity. I see the stories you can tell inside [luxury retail company] and how people have this amazing opportunity.	Organisational credibility
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	The HR Director is very important. Without her support it wouldn't have happened. She is the key to influencing other stakeholders who hold the purse strings. We are lucky in our organisation that we can do things like that. You can sit with the Finance Director and he will see some of the things we do as very fluffy. He is interested in hard evidence. It no good me saying that we retain people or that they are more motivated. We always have to measure things.	Top level support
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Validation of our existing Sales Academy (b) A big piece around the employer brand and what differentiates us from the competition (c) Internally it's about creating an amazing opportunity that people haven't had historically at this lower level. It shows we invest at every level. (d) That we would have an amazing group of Sales people who are our future brand specialists. This expectation hasn't yet been met. It was unrealistic. We need to think about what to do with this.	Credibility Sector credibility Opportunity Return on investment Improved staff performance
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	It is a combination of both ROI and ROE. ROI doesn't work. Trying to spend hours trying to measure it with the HR Director in the past. It took ages and it was impossible. You can't easily put a figure on things. But we can say that something made an improvement. But it is a waste of time to try to put a figure on that. We look at things like retention figures, development initiatives and promotions. But we do need hard facts. The idea of expectations sounds quite fluffy. We might need a new way of phrasing this. How would you measure whether it has been met or not? With people who hold the purse strings that is always the challenge.	Combination of both ROI doesn't work  Need for hard facts Expectations are fluffy

## Appendix 7

### Stage One - Interview G

#### L&D Manager Luxury Retail Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	We invest in L&D already, but I think what was evident to me over the past few years was about investing in our people and finding really good investment opportunities. It was about wanting to upgrade the calibre of our people and starting to look at what we could do to raise the credibility of what we do. But also at the same time it coincided from a personal perspective with my own role in [luxury retail company] as I developed into my learning & development role, it was about what else I could bring to the table. Part of that was looking at accrediting the Sales academy. It was a programme that I had written from scratch. It had been running in [luxury retail company] for a year or two. We had always had in the back of our minds ‘what would the accreditation of that look like?’ We wanted to benchmark our work, to look at the credibility of our work. We started to expand the portfolio of L&D options at [luxury retail company]. So that was one of the catalysts for implementing a programme such as this.	<p>Return on investment</p> <p>Credibility</p> <p>Sector credibility</p>
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	This was quite an organic one. It was only when we were looking at accrediting the sales Academy that it turned into what it did – a full honours degree. A key thing for us creating a programme in-house is that they can be specific to us and to our environment. That, then reaps you the results that you need. It’s about when you are covering any subject, whether it is about selling or customer service or about communications, by doing it in-house, you can make sure it is relevant to your business and to your organisation. You can use examples, you can use case studies and it is all very real around your organisation as opposed to going away to a college or university and look at a broad or generic subject matter that you have to bring back and try to make specific to your organisation. It removes that bit in between, it becomes relevant because you are doing it here. You have written it around what your organisational needs are. We have been able to choose all of our	<p>Contextualisation</p> <p>Contextualised content Use of examples from the business</p> <p>Contextualisation to organisational aims &amp;</p>

	modules, all of our assignments and end-of-level projects around what the needs of [luxury retail company] are. That is the ultimate benefit I think.	objectives Co-design Project outcomes
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	With an in-house programme I would feel I could be more demanding and get what I want, something that totally meets the needs of our business. Because we have brought it in-house and we are co-creating the content, I can be sure I can get what I want and what I need for [luxury retail company]. If I were going outside, it wouldn't be possible to be that demanding. The onus is on the individual to make it relevant. So, it is to be more demanding because it is just for you. It is the [luxury retail company] programme, not someone else's programme. I would expect that the in-house programme would provide better results which are relevant to our organisation – better sales or better development of our people.	Contextualisation Co-design  Ability to be more demanding Co-ownership Improved staff performance
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	Working on a corporate education project with an academic establishment would give me the opportunity to understand what it takes for a piece of work or a learning intervention to be 'academic'. It would give me an insight into how I can make my work more grounded in academia, more robust and in some cases more challenging but rewarding for the learner. I hoped that I would also gain an understanding in how this translates into a qualification i.e. how much work equals how many credits equals what sort of qualification.	Co-learning Academic credibility  More robust qualification
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	The benefit for us was around credibility. It was a stamp of approval that what we are producing in-house is good stuff. It is at academic level. That was a boost for the whole team. The other benefit is, when you are working with an academic institution, you learn from it as well. When we were accrediting our content we were challenged to think about the learning outcomes and the structure of the learning.	Academic credibility  Co-learning Greater understanding of academic approach
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	Firstly, that we would develop exceptional sales people for the sales floor through a dedicated sales programme. One that is far beyond anything we have ever produced, or	Improved staff performance

	run, before. Second, an opportunity for [luxury retail company] to be able to publicly demonstrate that working in retail and sales is, and can be, a career of choice, one that you can be proud to choose, as it now has an academic seal of approval. Third, the ability for [luxury retail company] to demonstrate its commitment to innovation and world class work-based learning, by being one of few organisations that has its very own BA (Hons.) Sales degree.	<b>Career development</b> <b>Academic success</b> Commitment to innovation & work-based learning
JS	Q7. What were your expectations of the university?	
Respondent	Our expectation was for the university to provide the part that we couldn't do ourselves, the more academic side. We wanted the university to help raise the level of what we produced. We were not naïve that the Sales Academy was at academic level, but we wanted to help raise it up and make it really robust. Another aspect was to develop a partnership to produce a really good product. A third expectation was that we got what we wanted as a business. The programme has cost £30,000 this year and £40,000 next year, so it must be fully fit for purpose. We also expect good service. The lecturers and contributors should be of high calibre who are bringing fresh thoughts and insights – not outmoded or out-of-date. They should be able to inform us of what is happening in Sales, CRM, luxury, now. We need top of the game content and lecturers. I'd expect the basics of great service. If we send an e-mail, it should be replied to quickly, if we pick up the phone, we should get an answer.	<b>University support</b> Academic input <b>Academic credibility</b> Co-design  <b>Lecturer expertise</b>  <b>Responsiveness</b>
JS	Q8. What were your expectations of the learning & development team?	
Respondent	My expectation is that the L&D team do what they can to make the programme successful. It was important that we bring in relevant support networks and relevant resources. As an example, we brought in stakeholders of high calibre, directors, specialists for some of the subject areas. For example, in the module The International Customer, the Director of International Business helped to shape the module and attended the assessed presentations. Also I would expect us to provide the basics of good service – to be courteous etc. Also, I would expect that we would be clear on what we are trying to achieve.	<b>Organisational support</b> <b>Wider connections</b> Co-delivery  Courteous
JS	Q9. What were your expectations of the line managers?	
Respondent	I would expect them to be supportive and to champion the fact that one of their team members was on a ground-breaking and intensive programme. I would expect them to give time off to attend lectures and to understand the complexities of weaving together work and course pressures. Also to be a source of knowledge and support with information,	<b>Organisational support</b> <b>Provision of time &amp; resources</b> Understanding of work/study pressures

	mentoring and coaching support. I would expect them to tell delegates where to go to get help and who to talk to.	Mentoring Wider connections
JS	Q10. What were your expectations of senior management?	
Respondent	Similar. To be supportive. To understand that it is an intensive programme. But also to be able to provide an insight into things that a Sales associate doesn't really get into. For example, the strategic side of things – strategic input. Also I would expect them to join in and to be honest and open and to talk about things as they really are. Not to dumb down information.	Organisational support Provide insight  Honest sharing of information
JS	Q11. What were your expectations of yourself?	
Respondent	As an L&D manager, creating the degree with the university meant that we could demonstrate to our organisation and to our peers in the worlds of HR and retail that our work is valid, that it is robust, and that it is good enough to be developed into an academic qualification. It also meant that by working with an academic institution my team and I would learn how to develop work at this level, something that we could then apply to other workshops, programmes and learning interventions that we develop.	Organisational credibility Sector credibility Academic credibility Greater understanding of academic approach
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	Some expectations have shifted and some have stuck. In terms of making a world-leading programme, I think we are there. It had such world-wide coverage – India, Singapore, Canada etc – from the mainstream press. It was also in the HR and Fashion publications eg, Vogue.com, Guardian and even the Sun – it was amazing. That expectation was met, if not smashed. One area has shifted. We had a great emphasis on sales results. While these have increased, the 10 students have also grown as individuals, they have a greater business awareness, a deeper understanding of the business and awareness of themselves. I underestimated this.	Shift in expectations Sector credibility  Improved staff performance
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	Ultimately it is about demonstrating results and showing that the learning makes a difference – all stakeholders want to see that there has been a difference from the programme. The senior management will be focused on seeing results. But L&D also need to achieve this. Students also want to see results and to now that all the hard work they put in was worth it. There are the academic results and the work results. The student needs to know that they are better Sales person and a better [luxury retail company] staff member.	Improved staff performance Demonstrating difference Return on investment  Academic & work results Improved staff performance



	But they also want good results from their degree. Maybe all the stakeholder groups are coming at the same thing from different angles. Senior staff want better business results and this can be achieved through their people. Students want to better themselves and the end product is better business results. In the middle are 'results'.	Similar expectations but from different angles
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	As L&D people we have the juggling act of making sure that every stakeholder level's expectations are met. If one isn't met, then the others aren't met. I have to go to senior management to get a budget. If there are no results they won't fund it. But also, delegates must enjoy it and get something out of it or no-one will sign up for the programme. So in L&D we have to meet all expectations. We must make the programme enjoyable and make sure the students benefit from it. But senior staff won't fund a jolly. But we also have to work at getting people to sign up for the programme. Then there are the L&D expectations. My strategy is to make sure that L&D is a world-leader in work-based learning.	Senior management Improved staff motivation  Sector credibility
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Students become better Sales people (b) Students develop a heightened ability to communicate well with customers and clients. (c) Students become better at driving their Sales up (d) Students develop a better understanding of products and the retail industry (e) Students develop a better understanding of how their role fits in with business strategy.	Improved staff performance Improved skills Return on investment Improved knowledge Wider strategic perspective
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	I wonder if they are two sides of the same thing, but it does force you to look at ROI in a different way. It gets you to re-evaluate what it was that you wanted to see. Ultimately you are still looking at what you got out of it. ROI focuses on 'I' i.e. the investment. In other words what you put in. ROE shifts the focus to what you achieved, rather than what you spent. It makes you shift your emphasis slightly, which is not a bad thing. From an L&D point of view, it challenges you as to whether you thought about your learning outcomes at the start. Expectation focuses on what you wanted to happen. It shifts the focus. We wanted them to better Sales people – are they better Sales people. Was it worth us spending the money? It is the same thing but a slightly different focus. That is not a bad thing. ROE makes you think about how to pitch to superiors. You can say 'these are my expectations and if I see these things happen then these will be the results'.	Two sides of same coin ROE provides a different perspective ROE shifts focus to what was achieved ROE relates to learning outcomes  ROE helps to pitch to superiors ROE monitors progress



## Appendix 8

### Stage One - Interview H Student Luxury Retail Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	I had never had a chance to do a BA degree in the UK before. I had been working for a few years and wanted to do a degree at HE level. It was all about trying to develop more knowledge about business and how a company works. Especially I wanted to get knowledge about retail practice. I also wanted to develop my ability to develop relationships with customers and ultimately to increase sales.	Increased knowledge about business  Better relationships Improved staff performance
JS	Q2. Why did you decide to go on a corporate education programme rather than an open education programmes?	
Respondent	I had done this before on a couple of wine courses. It is hard to manage undergraduate study with a full-time job. With this course the study was structured and we were given specific study days. This is much more realistic when you are working. Also a great incentive was the cost being paid for by the company. University course fees have skyrocketed and doing this course linked to work was ideal.	Managing work/study pressures Provision of time & resources Cost – paid by company
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	I would expect clear follow-up both during and after the degree course. It is down to us to apply but it is a major investment for the company. On an open programme it is up to us to make the most of it, whereas on a corporate education course it is up to the company to make sure it is useful. On our course we have discussed particular topics chosen by the company and we have done projects chosen by the company, like the rewards cards project. It is all linked to the business. My expectation of a corporate course is that we should be committed to some important issues in the company's current situation and we should make a significant contribution to the store. The course needs to be well structured so that we can make use of our experience and research to benefit the company.	Monitor student progress  Co-design Project sign-off  Contextualisation Project outcomes Well-structured design
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	I didn't know how the academic system worked so I needed some help on that. I hoped that	University support

	it would help me with developing critical reflection. I needed to know exactly what that would involve. In the work environment we need to learn to take a step back and analyse things from a more objective point of view. An important expectation was networking opportunity – to meet different managers within the company like the Head of Retail and learn from their experience. I also wanted to share my knowledge with others, particularly from lecturers who have more experience. I wanted to learn about inter-cultural awareness, entrepreneurship and really push the boundaries.	Gaining knowledge of academic study Networking Dissemination of knowledge
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	My expectation was to change processes within my department and to gain greater awareness of Sales practices. Also I wanted to learn from other departments and improve in handling people from other cultures. I also wanted to know more about how customers tick. In some ways, as I started to change my practices, it made it more difficult for others to adjust.	Wider connections
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	I expected it to create a pool of employees who are more aware of how to deal with difficult issues – to become trouble-shooters. We are not here to create problems but to find solutions for them. This is one thing we could do for the organisation having been on the course. Also I expected to help managers, in being able to contact people within the organisation. As students we had got to know people at senior levels within the organisation and we could help others network with them too.	Talent pool Dissemination of knowledge Networking
JS	Q7. What were your expectations of the university?	
Respondent	The university could help us gain more data, more figures and could provide experiences from other businesses. They could help us think ‘are we doing things the right way’. They could help us improve our processes and give us more insight into customer psychology. It was difficult to know what to expect before starting the course. I did expect the university lecturers to have a greater knowledge of the company and what type of customers we have, than they actually did.	University support Knowledge provision Critical thinking Knowledge of organisation & sector
JS	Q8. What were your expectations of the learning & development team?	
Respondent	The expectation came as we went along and I was very pleased to see that they were being very welcoming and they looked after us very well over the first year. They helped us to	Provide knowledge of academic study

	<p>move towards what was expected for an academic course. Support and encouragement was great. The second year, well we had to do it more on our own. [L&amp;D manager] was clear that that would be the way forward and that was fine. Once we saw that we could cope with our assignments, we had more freedom and independence. The L&amp;D team gave feedback and helped us to do better. They needed to understand the time constraints. We were coming from the shop floor and they were sometimes unrealistic about the time involved. We thought 'do you realise what you are asking, for us to get our assignments in on time' They didn't always understand the pressures on us. They needed to communicate more with our managers and how the rotas were arranged to allow us to do the course or arrange an early shift so that we could finish early. Sometimes from managers there is a bit of resentment that we are getting so much time away from the shop floor and it is difficult to ask for more time to avoid finishing late. By finishing early there is the possibility to study in the evening. The nature of the shop floor is that you may be expected to finish late and start very early the following day. So there was a bit of disconnection with what was happening with L&amp;D.</p>	<p>Interest &amp; encouragement</p> <p>Provision of feedback on assignments</p> <p>Provision of time &amp; resources</p> <p>Communication with line managers</p> <p>Work/study pressures</p>
JS	Q9. What were your expectations of the line managers?	
Respondent	<p>Well, to be supported and to respect the time off that I need in terms of studying time. To make sure that if I had an appointment with someone in the business, I would be able to get it. I needed support if I asked a question or wanted advice. I didn't want them to be too hands-on but it was important to know they were interested. I would have expected that they would request a 1:1 every now and again because we were taking time off from working on the shop floor. They needed to have an open door policy, but it is difficult to catch the line manager because they have so much to do. But they should make room for us in a very formal way, maybe once per month. Yes, I could have pushed harder, but taking time from the shop floor is costing the department so it should be a requirement from them. The manager should be asking what I have gained from my study. This could have helped her as manager. It could have helped them to become better managers.</p>	<p>Organisational support</p> <p>Provision of time &amp; resources</p> <p>Interest &amp; encouragement</p> <p>Monitor student progress</p> <p>Open door policy</p>
JS	Q10. What were your expectations of senior management?	
Respondent	<p>They should find a way to help us contribute to processes within the Division. At times I felt that they didn't connect with us in ways that I wanted. You would think that because they signed you up for the course the connection would be stronger, but because it is an open access course within [luxury retail company]. They didn't push more to get to know what we</p>	<p>Wider connections</p>

	are doing and how we could create benefit within the Division.	
JS	Q11. What were your expectations of yourself?	
Respondent	I suppose the first one was to sell more. That was pretty much the expectation that we were told – to beat the department average. I didn't know exactly how the course would relate to me – it would be a great time of learning and accessing knowledge, but how to translate it to Sales was something that I was still working on. In the first year, my time away from the shop floor to do the course meant a dip in my Sales figures, but in the second year I realised that actually I was pushing harder and I had more expectation to capture sales within the department. Yes, you are away from the shop floor but you have to perform as though you are there five days per week. I suppose the benefit came more after the second year. I think my Sales figures have gone up. At the moment I am second in my department. I think L&D have been happy to see that progress.	<p>Improved staff performance</p> <p>Knowledge provision</p> <p>Return on investment</p>
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	Well, I thought that it would have been a life-changing experience in [luxury retail company]. I thought it would take us to a different position or role within the organisation. I believe this was true for all members of the team. I later realised that this sort of thing may not happen. A lot of people who would like to apply for the degree will be asking 'what are you going to get at the end. Have you got a job lined up?' They and I can't understand why this has not happened. But that is the way it is and I suppose I had to tune down my expectation in that matter. But in terms of learning, if I hadn't done the course, it would have been impossible to gain knowledge and for that I am very grateful.	<p>Career development</p> <p>Unfulfilled expectations about progression</p> <p>Knowledge provision</p>
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	I view it as a great personal experience and it has given me more enthusiasm and motivation at work, but that is just for me. They would like us to be good ambassadors for the company and they would like us to pass on our experience and knowledge to others. But there is no formal structure to passing it on. They want us to be good students for two years and create a positive vibe across the business. The [luxury retail company] degree sound quite positive. We have contributed to the success of the business. Obviously the senior management want us all to pass and to make the whole degree programme a success.	<p>Improved staff motivation</p> <p>Become ambassadors</p> <p>Dissemination of knowledge</p> <p>Create a vibe in the organisation</p> <p>Academic success</p>
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	

Respondent	It has to be L&D. All the responsibility rests on their shoulders. They have got to make it a success. [L&D manager] was very active in trying to develop this programme and had to convince every member of the Board. He had to say 'this is the way forward' and to make it more recognised within the profession. He needs to make it a success within the company and a massive success for the students. He has to justify that it was worth the effort. Otherwise some heads will roll! It is a matter of responsibility because the course is two years, the company have invested a lot, they have brought a lot of media attention and I suppose that no-one can fail.	L&D  Organisational credibility
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Understanding our international customers, how can we bring more entrepreneurship at our level, (b) How can we try to drive more sales through the Business. How we can create more benefits for [luxury retail company] (c) How can we influence the strategy at our level (d) Can we change something in Harrods by talking to a Director. How can we be more known for having good ideas. The Directors attended our presentation and I would hope they would take note of our ideas. We should be respected for our research ability. (e) Expectation that it will influence our career	Return on investment  Greater strategic perspective Generate creative ideas  Organisational support Career development
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	That's a tricky one. L&D have recovered most of the cost of the investment through media coverage. The department bore most of the cost of the course by allowing us time to do it and they didn't get any comeback from the media coverage. So [luxury retail company] have got the money back but not quite in the right pocket. In terms of expectations this is more about motivation and how we can bring a positive note to colleagues around us. Could we achieve a lot more with a better team spirit within our department. There will also be some kind of assistance for the next group of students with us acting as mentors. This will create more time for the L&D team. Any potential applicant who comes to us in the future will receive positive vibes and support from us. They will know there is a difference between having knowledge on sales topics and not knowing about them. They will know that we have learned something from the experience of the different modules. They will know we are better employees as a result of the course. People will be intrigued to know why we are	ROE about motivation & positivity within the organisation Team-building  Increased reputation of programme

	<p>so positive about it. I come into work every day and some of my colleagues think I am from a different planet. I am more positive. It is good for managers to have happy, positive people in their team. Managers will get more support by having people within their team who are more knowledgeable and who can give examples from the wider business. It creates more team support. It also gives more divisional support. If you speak up in meetings you can be more accurate with facts and figures and it helps us gain more credibility which will bring better results for the organisation. It helps to support the team and deliver more business.</p>	<p>Spread positivity</p> <p>Organisational credibility</p>
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## Appendix 9

### Stage One - Interview I Student Luxury Retail Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	First of all, as a corporate programme, it gives me the opportunity to work and study at the same time, because it has been provided by the company. With a corporate programme they will allow me some time to study and get paid for that. They are a sponsor for me, which is brilliant. It is time saving. I know there is a lot of support from the company and it is an amazing opportunity to gather much more knowledge about business. It will also benefit my career.	Provision of time & resources Cost – company pays  Career development
JS	Q2. Why did you decide to go on a corporate education programme rather than an open education programme?	
Respondent	A corporate programme is more about a narrowing down of a subject that is relevant to my business. On the other hand, if I go on an open programme you get a wider view, so my expectation is that in a corporate programme I can study something really relevant, specifically in Sales in this case. Everything is based on the day to day activity within the company. On an open programme the topics would be wider and adapted to a different context.	Contextualisation  Contextualisation of content
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	I would expect this corporate programme to provide me with work-based knowledge. So, even if it involves lots of theories, it is related to something that I can practice in my everyday activity. So, what I learn, I can practice. I can improve my knowledge but also apply it every day. On an open programme my expectation would be that you have a subject to study and then you might apply the knowledge or not, but you don't always know whether that subject is relevant to your own business or to your own career. A corporate programme is much more specific and relevant.	Knowledge provision Theory to practice  Contextualisation
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	I would say to gather more information, to increase my knowledge in terms of business	Knowledge provision



	knowledge and academic knowledge. I can mix theory with practice and reality. I can match them together and develop my critical thinking. That is my expectation. I saw an amazing opportunity for development. Also my expectation was communication and team-work. Also, it was about having the ability to use specific terminology to express ideas about business. So, now I do presentations about business and I know what I am talking about and how I can express my thinking, using critical analysis.	<b>Theory to practice</b> Develop critical thinking <b>Team-building</b> Learning terminologies
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	My expectation is to see the department as a team. I can share my knowledge with managers and buyers and support them with my expertise. I am doing things on a daily basis in a different manner, but I have the background behind me, that I know 'why' things happen. Some people do things every day but they don't know what is behind that, Through study I know that there are some theories that have been proved that provide the 'why'. So I can tell the 'why'. Before, it was more like instinct. My personal knowledge was very practical but I can deliver to my department what lies behind that and 'why' things happen. Also it explains why things should not happen because they might be wrong.	<b>Team-building</b> <b>Dissemination of knowledge</b> Deeper knowledge  Gaining academic understanding
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	I believe there are two different ways. It can deliver a short return on investment through an increase in sales and an increase in service and engagement with the team. There is also a longer term investment because the organisation can rely on a group of individuals who they have developed and will be much more loyal to the company. They will develop their skills further within the company. The return on investment will be dramatic in the years ahead. I am experiencing now that, through the corporate education, we know much more about how the business works and we have networks with Directors and other stakeholders. I believe there is a return on investment for them through the projects that have been applied. We have found ways to make the business even better, although we are already very successful but this is thanks to the corporate education approach.	<b>Return on investment</b> Improved staff performance Improved staff motivation Higher loyalty to company Increased skills Return for the long-term <b>Networking</b> Project outcomes
JS	Q7. What were your expectations of the university?	
Respondent	I think they met my expectations. Every time I was looking for something, in terms of books or resources, or support, I would get very good feedback. At the end of our presentations or when I would complete an assignment, the part they would give feedback on what I did well,	<b>University support</b> Learning resources Feedback on course



	<p>what I did less well. The only way you can grow is through feedback. Without that there is no way to improve. The online service was amazing. It saved me time. I found it very easy to access many resources, many journals and it was very straightforward. Working as a full-time employee, my expectation was to gain good access online to find relevant resources. The other thing that went above my expectation was that in every single module the university provided two to three pages of the main books and the relevant literature that was absolutely phenomenal for corporate education. We were working around 40 hours per week and having these resources went above my expectations. It was really appreciated.</p>	<p>progress</p> <p>Learning resources</p> <p>Good literature lists</p>
JS	Q8. What were your expectations of the learning & development team?	
Respondent	<p>Well, that was really interesting. My expectation was of course to meet with other students and find ways to study together. I didn't expect to do a team project, but we did it. I didn't expect it to be quite so much work. Every year we had a final project and I learned that it is extremely important to have specific roles within a team and to identify which skills people have. I expected support from the L&amp;D team and engagement with the company. I expected them to keep us on track with everything and provide support. If you are doing well they would encourage you. If you weren't doing well, then let's see how we can support you. I would expect monthly reviews, giving feedback on assignments, what has been done well and what has not. L&amp;D can cover more of the business side and what the corporate expectations are, and the university can cover the academic side.</p>	<p>Collective learning</p> <p>Team-building</p> <p>Organisational support</p> <p>Monitor student progress</p>
JS	Q9. What were your expectations of the line managers?	
Respondent	<p>I would expect support. I would expect them to provide flexible hours. I would expect them to help with good time management with a rota, especially around times of assignments or presentations. Also, I would expect them to help with engagement with the team, in morning briefings to allow me to share information with all the sales associates and allow me to provide a monthly or quarterly presentation to all the team. That will help us to share more things within the business. The line manager should do that.</p>	<p>Organisational support</p> <p>Provision of time &amp; resources</p> <p>Dissemination of knowledge</p>
JS	Q10. What were your expectations of senior management?	
Respondent	<p>I would expect them to be interested in our course and recognise us as a group of individuals with different backgrounds with a big will to learn. Also, I would expect them to understand the effort and commitment to attend this course. It is a lot of work for us to do the course but at the same time we are driving the success of one of the best businesses in the world and we need to always be at the top. So I believe that Directors know what we</p>	<p>Interest &amp; encouragement</p> <p>Understand work/study pressures</p>

	<p>went through. They should know what we are doing and that we are an asset for the company. They should be proud because it is the first degree in Sales and we are the first group to achieve it. I would expect them to recognise us for our achievement and to look into our career. They should get feedback from L&amp;D and from the university and get feedback as to how the delegates performed during the degree. I would expect them to use the delegates in a strategic manner. It is important to retain these individuals and to ensure that they can go forward.</p>	<p>Celebration of success</p> <p>Career development</p> <p>Monitor student progress</p> <p>Ensure retention of staff</p>
JS	Q11. What were your expectations of yourself?	
Respondent	<p>At the beginning I thought it would be a learning experience and that it would improve my experience and my ability – to do my job better. I saw myself as being able to do things I never thought I was capable to do. At the beginning I wasn't able to write a paragraph of an essay and then I ended up getting a 1<sup>st</sup> in my first essay. I wanted to push myself towards the limit and explore areas where there was further room for improvement. So it was about improving my knowledge, improving my sales performance, improving my service, working better as a team and to provide something for the business. This happened, so I am happy.</p>	<p>Greater experience</p> <p>Improved staff performance</p> <p>Academic success</p> <p>Improved staff performance</p>
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	<p>I think they have been realistic. I personally believed it was up to me to be focused enough to believe in my vision. If you have the determination you can do anything you want to do. You should just go ahead. So, for me I would say realistic even if my dreams were big I knew that I was on my way.</p>	Realistic
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	<p>I was probably focusing more on my career development whereas a line manager would like me to improve my sales and make the team environment better. L&amp;D are happy developing people and to deliver something to the business. Developing my career can also match L&amp;D goals, because we are moving up within the company. Senior management wanted to develop a group of people who would improve in Sales. This would provide a greater amount of money. They would want data to back this up. My expectation, in contrast, was to gain greater knowledge about the company. Directors were more interested in developing the ultimate sales person.</p>	<p>Career development</p> <p>Improved staff performance</p> <p>L&amp;D concerned with developing people</p> <p>Talent pool</p>

JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	I would say directors. They are people who are in the business for the long term, so they can look up your performance and have an impact on your future. They also like to see individuals develop. Some of them started with a very simple job and they have grown into what they are. They know that people are on a journey, like they were and so there is a lot of interest.	Senior staff
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	<p>(a) A key expectation is to increase knowledge and critical thinking, to look at things from an objective point of view, instead of subjective</p> <p>(b) Communication skills: now I know how to deliver a message in a clearer way than I used to do. Also to communicate in a linear way, whereas in my culture you can say whatever you want.</p> <p>(c) Improvement of my selling techniques. I now know how to sell to different customers. I know how to build relationships with different customers and how to maximise a Sale.</p> <p>(d) To understand the psychology of sales. Sales is about communication and about people that you like. You need to really understand people.</p> <p>(e) Career development opportunity: either in this company or somewhere else.</p>	<p>Greater knowledge</p> <p>Increased skills</p> <p>Improved staff performance</p> <p>Career development Portability</p>
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	I think it is a good way to show that it is not only about figures. It is also about emotional intelligence and to understand the big picture. Expectations are a group of different things that people are thinking they would like to see. ROI, at the end of the day is about what I invest and spend and how much money I got back. But you cannot measure quality, you cannot measure service, you can't measure the development of individuals. It is difficult to measure their skills. You would need to do a big analysis. So I think that expectations are about a big chunk of things that are really relevant. ROI is a very simple and easy way of looking at things. It is quite cold, with raw data. I think this is useful but it must be surrounded by something else to create more meaning. This might involve an improvement to someone's performance, or that they became a good team member, or their customer service was amazing or they developed a project and developed an idea that was relevant to the business or was able to connect to different departments etc. These are more difficult to measure.	<p>ROE not just financial</p> <p>ROE about EQ &amp; strategy</p> <p>ROE about how people think</p> <p>ROI cannot measure many important aspects</p> <p>ROI is simple, but cold</p> <p>ROI uses raw data</p> <p>ROE creates more meaning</p> <p>ROE more difficult to measure</p>

## Appendix 10

### Stage One - Interview J

#### L&D Manager Builder's Merchants – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	There were a couple of reasons. Firstly it's about succession planning and looking to the future. What we have had in the past is a trainee programme which has led to some success in training our duty managers, but this was looking at a higher level to identify future senior managers in the organisation. Another reason was, it was opportunity. It came to us via e-mail from [the university], it piqued my interest and I got in touch and once I had met [business development manager], it seemed a good opportunity for us. Typically in this organisation what you will find is, our senior managers have been in this industry for all their lives and very few have any external qualifications. They have massive experience, they know everybody but very few have that wider business knowledge and have got any form of qualifications. So, this seemed to hit everything that we needed to do.	Succession planning Career development  Talent pool Opportunity  Gain qualification
JS	Q2. Why did you decide to send people on a corporate education programme rather than sending staff on open education programmes?	
Respondent	It was the fact that it could be bespoke to us. We worked quite closely with [business development managers] from the university to tailor the programme to what we wanted. There were some specific things that we needed in terms of skills and knowledge in the Group which was around sales and marketing and particularly change management, so we wanted to make sure those aspects were in there. We also wanted work-based projects and this seemed to fit in with what they were offering. So it was the fact that they could tailor it to us. The only thing missing was interaction with other organisations and networking with other organisations, which we did miss.	Contextualisation to organisational aims & objectives  Contextualisation of projects
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	I think our expectations would be higher because, having tailored the programme to us and in doing so we were making sure we had the support mechanisms internally. I am not sure we would have done that if it had been an open programme. The mechanisms were support	Higher expectations of corporate programme

	of company information, access to everything needed. Obviously we would have helped them with books and costs. Because it was a corporate programme it was almost that we took much more ownership of it and therefore we were really keen that these guys progressed. We wanted to get something out of it in terms of the projects that they did. I am not sure we would have done this with an open programme. Partnership with the university has also been an important aspect of the programme. We have had regular meetings with [university link coordinator] to make sure that all is still on track and when it came to the projects [university link coordinator] came to us and we said 'these are the key areas that we want the guys to work on', so partnership between us and the university has been very good.	Provision of time & resources Co-ownership Project outcomes Partnership Feedback on course progress
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	Well, personally, it was something I had never been involved in before. It certainly helped in terms of my education and development but it has been good experience for me, working closely with the university. I have also been involved in the assessment of some of the modules and the projects. There was a time when I was going to do the course myself but I went down a different route. I don't know that I expected those things at the beginning. Before we started it was more about managing and monitoring but it was interesting that as it progressed, I got more and more involved. So, it involved developing the actual programme to then being involved in the assessment. Yes, it's been very good for me personally.	Co-learning Co-assessment Monitor student progress
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	Well, I am part of the HR team and L&D in particular. It's about increasing skills and knowledge. It's about identifying some talent. It's about succession planning. But it is also about the timing. We advertised the course internally. We didn't pick people to go on it, we asked for volunteers and it was not long after we'd had issues with the recession, we'd had redundancies and I think it gave a very good message to say 'yes, we have had difficulties, we have had to make difficult decisions, but we are still keen on developing our staff'. So, there were several benefits.	Knowledge provision Talent pool Succession planning Selection Improved staff performance
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	We expected it to deliver future talent – future senior managers. People with the right skills	Talent pool

	<p>and knowledge to go on to senior positions within the company, to understand the wider business world, which is one of the things we haven't done very well in the past. So it was to take the company forward really. We had a couple of senior managers on the course. We had all levels involved. We opened it up – they had to be in a managerial position. There was a selection process, which was carried out jointly between us and the university, but once people had passed that, it didn't matter what their current role was, we allowed them to start the programme. Since then, one of them who was working on one of our counters has now been promoted to a supervisory position and has just been identified as a potential branch manager and is going on a fast track programme. We wouldn't have identified that sort of person without this programme and we certainly wouldn't have been able to put the knowledge and skills into them in the time we have done. So the foundation degree has been perfect for them.</p>	<p>Understanding of wider business world</p> <p>Selection</p> <p>Talent pool</p>
JS	Q7. What were your expectations of the university?	
Respondent	<p>Before the programme started I wasn't sure what to expect. Having had the initial meetings with [business development managers], I think what I then expected was regular feedback from them. It's interesting actually, we had this discussion 6 months into the programme. I didn't feel I was getting enough communication from them as I expected. I didn't see any of the students' scores for their modules and then [university link coordinator] explained that that is not something that they do. The contract is between the student and the university and not the employer, which I found quite difficult. So I expected more from them in terms of reports on how the students were progressing and that didn't come initially. Having said that, after about a year, it improved, so I am not sure whether there was a change of policy or thinking. Again, I was involved in some of the initial assessments and then didn't see the results of those. I also expected their support for the students. Maybe also some feedback on the programme itself – the fact that it is a bespoke programme has never been discussed. In terms of the teaching the students go away for 7-8 weekends per year and spend Friday to Saturday there, supported by online support. Obviously the expectation is that this works and that the students feel that this works. We have had some issues with the online part of that not working as well as expected. We have had students complain of e-mails not being returned or work being submitted online but not coming back. So that hasn't been as good as it could be. Interestingly the second group we started a year later was meant to be almost completely online but that didn't work at all, so we have had to go back</p>	<p>Feedback on course progress</p> <p>Feedback on course progress</p> <p>Responsiveness</p> <p>Lecturer expertise</p>

	to the same as the first group. But the teaching content has generally been very good.	
JS	Q8. What were your expectations of the learning & development team?	
Respondent	That changed as the programme went on. What I expected from the start after the initial meetings was to be involved in the development of the programme and the modules to be provided. I expected to get involved in the initial selection process. That was pretty much it. After that it was more about regularly talking to the students, see how they are getting on and see if there is anything else they need, see if there is anything else we can do as a department and as a company to support them and to make sure they achieve the qualification. I have attended some of the weekends and the assessments. Talking to the students is more as and when. A lot of it has been reporting by exception. If they have any problems they come to me. But that has not been over-demanding. If there had been higher demands than that on us, we would have had second thoughts about doing a second year.	Co-design Selection Monitor student progress Organisational support Answers to student enquiries
JS	Q9. What were your expectations of the line managers?	
Respondent	Line managers, we did include them in the selection process first of all in that we asked anyone wanting to go on the programme had to write a short piece as to why they wanted to be involved. That had to be signed off by the line manager before they came to us. So, the line manager understood why the individual wanted to go on the programme. What we expected from the line managers from then on was to talk to their member of staff and find out how things were going and be able to offer help and signpost them to other managers within the organisation if they needed that and to provide information if they needed to. Some line managers have been better than others but generally they haven't been very involved. They have busy jobs. Generally it is by exception. If there was a real issue they might have been involved, but otherwise I am not sure they have spoken to their people much.	Selection Monitor student progress Wider connections
JS	Q10. What were your expectations of senior management?	
Respondent	I would say very similar. They should support the students as and when they needed it. And to be honest they have been very good at that. So, the CEO has been directly involved in some of the projects in advising. A student has wanted to do a particular project area and we have said speak to a particular manager and they go and talk to him. And they have made themselves available to do that and given them some good advice. That's been good. When the students did their first projects, in the first year, they came up with a proposal and had to present the proposal to the university, but the students also presented to us, that is	Organisational support



	the CEO, myself and the HR Director. So, we listened to all their proposals, gave them feedback and then signed off on it. A couple of those projects we actually changed as well. We would tell them that there was something coming up in the organisation in the future and why don't you tailor your project to this and those projects got changed slightly.	Project sign-off Contextualisation to organisational aims & objectives
JS	Q11. What were your expectations of yourself?	
Respondent	It was to be involved as much as possible and to learn from it, as I have already said. It was interesting to learn about the process of getting the degree up and running. But I had no expectations of that at the start as I didn't know it. But after we started the programme it was about supporting the students.	Co-learning  Organisational support
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	My expectations were quite high in that I wanted to get that broader business knowledge into the organisation, having helped to develop the programme and the content of the modules. I think my expectations were quite high. I expected the students to come out of the programme with some real skills and knowledge that would benefit the organisation. And having seen some of the initial projects they started to do that. The projects that they are now on should benefit the organisation even more. And what I did expect is that it would start to develop this talent within the organisation and it has done that as well. So, my expectations were high but realistically high.	High  Theory into practice Project outcomes  Talent pool
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	Yes I think they would be different. Certainly line managers' expectations would differ from what I would expect. Line managers didn't really have any expectations whereas L&D was looking for development of talent etc. Senior managers were looking for the same. L&D and the senior team were quite aligned in what they were looking for. Students may have expected that by going on this course they would get automatic promotion – I am not sure. We have had to manage those expectations and say that the programme wouldn't necessarily do that. We are not saying that everyone who goes on this programme will become a manager. We are saying it will give you the knowledge, skills and evidence for when opportunities arise. Some have gone on to different roles which has been fantastic. But there was no guarantee and we made that clear at the start. Student expectations were to succeed. We said we would give them some books at the start. We expected some drop-	Different  Talent pool  Career development  Provision of time & resources



	outs from the initial starting group. We said we would give you 8 days per year. So, we expect you to take it seriously.	
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	The immediate answer would be the senior team, because they are supporting students, giving them the time and paying for the course so we want to see a return. But then the students' expectations are also extremely important, so it is probably a toss up between the two. I think for the programme to be successful, the expectations of the two groups are about equal. The senior team need to see that we are getting some value out of it but also the students need to see that they are benefiting from it. So, it is pretty damn close. Students are important because they are sending out the right message to their colleagues. If we weren't meeting their expectations, or the programme didn't go very well then the wrong message would have gone out to the whole organisation so they are certainly an important group, but at the end of the day it is the Directors who signed it off and said you can do this. They are the decision makers.	Senior team <b>Return on investment</b> Students These two are equal
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) The expectation that we broaden the knowledge of some of our staff. Some of our managers don't have that broader knowledge. (b) Identifying and developing a talent pool. (c) Succession planning (d) The payback to the business especially from the projects	<b>Knowledge provision</b>  Talent pool Succession planning <b>Return on investment</b>
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	Being in L&D for years, ROI is something that we always look at. You know, I am spending all that money, what is it going to add to the bottom line. That is a fairly traditional way of looking at any training programme within an organisation. So, return on expectations is an interesting idea in terms of concept, but I suppose what I couldn't see initially is how it would help me in terms of the evaluation of future programmes. So, until I can see some results and what it really means, then it is difficult to make a judgement. Being a practical head of a training function we need to see return on investment. I suppose we do need to think about the beginning rather than the end and why it has started. Setting out before we start, what we are looking for and then monitoring. Whether you call those objectives for the programme or expectations for the programme, perhaps they are very similar. You'll have to	ROI is the norm  ROE an interesting concept How will ROE help with evaluation?  ROE helps to think about the start Difference between ROE and programme objectives

	<p>tell me. ROE may be easier to monitor because ROI is hard to measure since these guys may not give return to the bottom line for some time. And the programme is finished and done by that point. You have spent the money and done whatever you could before you get the ROI whereas perhaps ROE would be able to monitor things as they go on. So, setting expectations at the beginning is interesting. Yes, I could see that. It does help you to see the views of the different stakeholders.</p>	<p>ROI hard to measure  ROE may be easier to measure  ROI may take time  ROE helps to analyse stakeholder views</p>
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## Appendix 11

### Stage One - Interview K Student Builder's Merchants – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why did you decide to initiate a corporate education programme?	
Respondent	I have come up through the ranks. I messed about at school and wasted the talent I had. Since then I have gone through working in the yard at [builders merchant] to Branch Manager in a good branch. I should have tried harder at school but had other priorities at that time. A few years ago I did an NVQ Level 3, not university level and I came top in the county. This gave me confidence. I also passed NVQ4 and had good feedback. So when the degree came up I jumped at the chance. A BA is well known and in business, when I leave [builders merchant], at least I can take it with me.	Portability
JS	Q2. Why did you decide to go on a corporate education programme rather than an open education programme?	
Respondent	The corporate scheme was offered at the time I thought of doing it. I don't like reading from textbooks. I needed knowledge to go through the filter of a lecturer, rather than study all by myself and I promised [builders merchant] that I would complete the course.	Opportunity Lecturer expertise
JS	Q3. How are your expectations likely to differ between a corporate education programme and an open education programme?	
Respondent	I am quite well exposed in the company. Doing this corporate education course has been a massive leg up in the company. There are lots of people on the course; some are above me and some are below me. All of these have progressed. A corporate programme gives business advantages. Projects are important. We have 16 of them; we do them, hand them in but then they go no further. It would be good to see the projects implemented within the company. That was the intention but it has not happened. Also, I have had to dumb down things I do as they might be seen as coming from the university and be frowned upon. There is a fear that the programme is above the builders merchants industry and it can be threatening to others.	Career development  Contextualisation Contextualisation of projects Project outcomes  Resistance from others
JS	Q4. What did you expect the corporate education experience to deliver for you personally?	
Respondent	Don't know. I wanted a degree. I felt I had let myself down in the past and I wanted to be	Compensate for past failure

	part of an exclusive club that has a degree. It's on my CV now and it gives a little bit of security. I needed something else. It is portable education to other sectors.	Academic success Career development Portability
JS	Q5. What did you expect the corporate education experience to deliver for your department?	
Respondent	I hoped we would have inspiration for projects. That defined a monetary value for the branch. It broadened my horizons and helps me now to coach my team. It helps them to go onto other things. There is a knock-on effect from my learning to the wider team - the ripple effect. It creates a happy motivated manager – me – which has an effect on my department. If I am happy, it is good for everyone else.	Project outcomes Dissemination of knowledge Collective learning Improved staff motivation
JS	Q6. What did you expect the corporate education experience to deliver for the organisation as a whole?	
Respondent	The organisation gets x16 of what I have just said. The organisation has invested money in x16 people and locked them in for the next few years. You would hope there would be benefit for years to come. It is x16 people feeling wanted and needed. If you send a good message that [builders merchant] will do better for you, then other companies will be impressed. Ideally the programme will create the next set of Directors. Until now, very few below the level of Director have had degrees. Now we have grown talent, ready to take that step up.	Return on investment  Sector credibility Talent pool
JS	Q7. What were your expectations of the university?	
Respondent	I didn't have a clue at the start. Didn't know what university was like. It was very much a step into the unknown. Because we are studying partly by distance learning, it's important that we get feedback and this hasn't always happened. If we had a simple query that needed five minutes, I have waited weeks to get a response, which has stopped my progress. Support and availability is important. It is something that people have complained about most. I like to be ahead in my work, but things have slipped. We don't work to school holidays but our support in the university does. You would also hope that you would get lecturers that engaged you. For the most part they have been great. There is a need to talk to us at our level. Most people on this course weren't good at school.	Feedback on course progress Responsiveness University support  Lecturer expertise
JS	Q8. What were your expectations of the learning & development team?	
Respondent	We expected to be allowed out of work and get days away – Fridays. This has always been supported from the top from day 1. Also, there has been a promise of availability of people	Provision of time & resources

	to speak – Directors etc. All our projects have been supported by the business. No obstacles have been put in the way of the projects. We have been well looked after.	Project sign-off
JS	Q9. What were your expectations of the line managers?	
Respondent	You would expect line managers to support the programme. If you are a manager you are the most important person in the branch. You would expect them to give the availability to attend the programme. Some line managers haven't liked it. Some managers have not been happy and some people have been pulled back from attending the programme. You would expect the line managers to embrace it, not assume it was rubbish. All I would expect is a little bit of interest and a catch up, "how are you getting on?". I would also like them to skim-read assignments, especially the conclusions. I have written thousands of words, but I am not sure anyone has read any of them.	<b>Organisational support</b> Provision of time & resources  Interest & encouragement Provision of feedback on assignments
JS	Q10. What were your expectations of senior management?	
Respondent	Similar. I expect them to embrace the projects. We were asked by the company to look at things through projects. We were given a list of projects by Directors – issues within the organisation. You have motivated people to look at them. You would expect interest. But the project reports were not read. They were completely ignored. It would have been good of them to have worked through the conclusions and how to implement them. Good ideas need to be put into action.	Project sign-off Contextualisation to organisational aims & objectives Interest & encouragement
JS	Q11. What were your expectations of yourself?	
Respondent	At the beginning I expected to be good. That's what I thought I was. But I soon got brought down to earth through some crappy marks. I expected myself to commit and to see it through. There was never a question that I wouldn't. I expected to do well. It took a while. School was too easy, then it got hard. This programme was hard straight away and I had to learn what was expected. My work has really improved now.	Academic success
JS	Q12. How high were your expectations? Were they unrealistic or realistic?	
Respondent	I had high expectations, but realistic. I expected to pass and expected to do quite well. So, when I didn't at the start I was surprised. I got my kick up the arse early. Others started well but have now dipped. But I still don't know what a good essay is.	High but realistic
JS	Q13. How do you think your expectations differed from other stakeholders within the organisation?	
Respondent	I don't know. Senior management want the course to take place but they don't know quite why. They don't know what they want from it and what the aim is. They want some kind of	Senior staff expectations are unclear

	financial return. The programme is seen as a good thing. Other competitors are doing it, so we should do it. It has been oddly received in terms of level of action from what has been received. We expect that we would get a response from what has happened from senior management. But this hasn't happened.	Return on investment Sector credibility
JS	Q14. Whose expectations do you think are most important within the organisation? Why?	
Respondent	Student expectations are the most important. They are the ones who will carry the torch forward. Once the course is done, we have to take the experience forward. The company will see the benefit over time.	Delegates  Return on investment
JS	Q15. Out of all the expectations you have mentioned, which do you think are the most important? Can you rank your top five?	
Respondent	(a) Pass and pass well (b) Pass on some of what I have learned to others (c) My BA will contribute to my career and moving on at work. The three years won't be wasted and are not for nothing (d) My thoughts and ideas will be implemented across the Group. Projects should be given more credence	Academic success Dissemination of knowledge Career development  Dissemination of knowledge
JS	Q16. What do you think of the concept of ROE in contrast to ROI?	
Respondent	I think it's a spectacular idea – you've really got something here. As soon as I heard about it I thought "yes absolutely". It is a much more difficult thing to grasp. There are lots of things driving the need to quantify something. But what do you get from things that don't make you money. What do you get from x16 motivated staff and the ripples of goodwill that emanate from that? They become ambassadors. There is a responsibility to manage those expectations all around – with the people doing it right to the top. The company have let us down a bit. Maybe the senior management don't have expectations of what the course is all about. Evaluation should be judged by more than just money. We are in an area of caring for our people – of corporate social responsibility. You want to manage people well. You need expectations from above and below. There is a danger of the expectation dimming and going dark. It is a big sacrifice to do the course, so you need to know it is worthwhile. Marriages and relationships have gone on this course. So, it would be nice if there was some purpose to it all and everyone could see what it was. Then your expectation would be met. Failure to meet expectations creates feelings of "I'll go elsewhere and leave" rather than make the company better.	ROE spectacular ROE harder to grasp ROE deals with intangibles such as goodwill Important to manage expectations Senior staff expectations are unclear Evaluation should be judged by more than money Expectations are from above & below Expectations should be met

## Appendix 12

### Coding Inclusion Rationale Stage Two Survey Questionnaire

Coding Tree			
Codes	Frequency	Inclusion	Rationale for inclusion/non-inclusion
Note: x6 occurrences and above has been taken as the general rule for inclusion within the survey questionnaire. However, some codes with less than x6 occurrences have been included for reasons specified.			
<b>A Organisational Support</b>	<b>109</b>	No	General question not needed as the issues are covered in A1 to A10
A1 Interest & encouragement	11	Yes	High frequency of occurrence
A2 Monitor student progress	13	Yes	High frequency of occurrence
A3 Management of course logistics	4	No	Low frequency of occurrence
A4 Provision of time & space	17	Yes	High frequency of occurrence
A5 Provision of feedback on assignments	7	Yes	Reasonably high frequency of occurrence
A6 Mentoring	5	No	Low frequency of occurrence
A7 Project sign-off	5	No	Low frequency of occurrence Not all students have engaged in projects and consequently some may not be able to answer the question
A8 Celebration of success	3	No	Low frequency of occurrence
A9 Wider connections	8	Yes	High frequency of occurrence
A10 Answers to student queries	4	No	Low frequency of occurrence
<b>B Return on investment</b>	<b>67</b>	Yes	Four questions are needed per dimension. There is a sufficient gap between this code and B1-B3 for this code to be included
B1 Project outcomes	6	Yes	Reasonably high frequency of occurrence
B2 Improved staff performance	17	Yes	High frequency of occurrence
B3 Improved motivation	6	Yes	Reasonably high frequency of occurrence
<b>C Career Development</b>	<b>64</b>	Yes	Four questions are needed per dimension. There is a sufficient gap between this code and C1-C4 for this code to be included
C1 Selection	10	Yes	High frequency of occurrence
C2 Talent pool	17	Yes	High frequency of occurrence
C3 Succession planning	9	Yes	High frequency of occurrence

C4 Portability	5	No	Low frequency of occurrence
<b>D University Support</b>	<b>49</b>	No	General question not needed as issues are covered in D1-4 and F1-5
D1 Knowledge provision	7	Yes	Reasonably high frequency of occurrence
D2 Flexibility	3	No	Low frequency of occurrence
D3 Knowledge of organisation & sector	2	No	Low frequency of occurrence
D4 Lecturer expertise	13	Yes	High frequency of occurrence
D5 Responsiveness	3	No	Low frequency of occurrence
D6 Feedback on course progress	6	Yes	Reasonably high frequency of occurrence
D7 Learning resources	4	No	Low frequency of occurrence
<b>E Credibility</b>	<b>49</b>		General question not needed as issues are covered in E1-4
E1 Organisational credibility	12	Yes	High frequency of occurrence
E2 Sector credibility	14	Yes	High frequency of occurrence
E3 Academic credibility	10	Yes	High frequency of occurrence
E4 Academic success	9	Yes	High frequency of occurrence
<b>F Contextualisation</b>	<b>44</b>		This section does not have enough statements with sufficient frequency of occurrence to form a proper dimension. Those statements with sufficient frequency of occurrence have therefore been collated with the statements under "University support".
F1 Contextualisation of content	3	No	Low frequency of occurrence
F2 Contextualisation of assignments	2	No	Low frequency of occurrence
F3 Contextualisation of projects	2	No	Low frequency of occurrence
F4 Contextualisation to organisational aims	7	Yes	Reasonably high frequency of occurrence
F5 Theory into practice	12	Yes	High frequency of occurrence
<b>G Collective learning</b>	<b>37</b>	Yes	Four questions are needed per dimension. There is a sufficient gap between this code and G1-G4 for this code to be included
G1 Team building	11	Yes	High frequency of occurrence
G2 Breaking silos	3	No	Low frequency of occurrence
G3 Networking	4	Yes	Low frequency of occurrence, but x4 statements are needed per dimension and networking is linked to the desire for wider connections in A9.



G4 Dissemination of knowledge	8	Yes	High frequency of occurrence
<b>H Partnership</b>	<b>36</b>	Yes	Four questions are needed per dimension. There is a sufficient gap between this code and H1-H4 for this code to be included
H1 Co-design	11	Yes	High frequency of occurrence
H2 Co-delivery	3	No	Low frequency of occurrence
H3 Co-learning	7	Yes	Reasonably high frequency of occurrence
H4 Co-ownership	4	Yes	Low frequency of occurrence, but four questions are needed per dimension

## Appendix 13

### Stage One Interviews - Expert Opinions

Gulen Addis

To:

Salkeld, John

22 February 2013 14:41

Dear John,

I have looked at some of your interview transcripts and the questionnaire. Both are fine for your PhD. Please see my comments:

1. Have the codes been drawn up accurately as a fair representation of the text?

Coding and themes are fine.

2. Have any important themes been omitted?

It seems pretty complete.

3. Should any further primary or secondary codes be included?

No

4. Is the questionnaire a fair reflection of what has been derived from a cross sectional analysis of the coding?

Yes

5. Do you have any suggestions as to how the structure or the wording of the questionnaire might be improved?

The interviews are very good quality both in terms of content, length and themes. Recurrent themes are clearly identified in such a way that they are immediately obvious to a non-specialist. The questions are effective in terms of being suitably open ended and usefully ask about some of the same themes in different ways. The colour coding is nicely presented.

Kind Regards

Dr. Gulen Addis  
Senior Lecturer  
Bucks New University  
106 Oxford Rd.  
Uxbridge UB8 1NA

Mark Addis

To:

M

[Salkeld, John](#)

22 February 2013 14:38

Dear John,

I have checked your transcripts and questionnaire. Both seem appropriate for a PhD. In response to your questions:

1. Have the codes been drawn up accurately as a fair representation of the text?  
The interviews are suitably coded.

2. Have any important themes been omitted?  
There is nothing of obvious significance.

3. Should any further primary or secondary codes be included?

No

4. Is the questionnaire a fair reflection of what has been derived from a cross sectional analysis of the coding?

Yes

5. Do you have any suggestions as to how the structure or the wording of the questionnaire might be improved?

The questionnaire is good but the ages of the participants should be added. At the end of it a comment box should be included to capture any responses about service quality not covered by the questions.

Regards,

Mark

\*\*\*\*\*

Prof. Mark Addis

Professor of Philosophy

Faculty of Performance, Media and English

Birmingham City University

Birmingham B42 2SU

## Appendix 14



### Stage Two Questionnaire – Questions and Results





## Expectations & Perceptions of Corporate Education results






### Survey overview






**Number of respondents:** 50  
**Expected number of respondents:** 80  
**Response rate:** 62.5%  
**Launch date:** 06 Mar 2013  
**Close date:** 10 Sep 2013




### Section 1: Biographical Details





1. Are you			
Male:		48.0%	24
Female:		52.0%	26





2. Which age bracket are you in?			
18-30 years:		18.0%	9
31-40 years:		38.0%	19
41-50 years:		36.0%	18
51-60 years:		8.0%	4
61+ years:		0.0%	0

3. Which sector do you work in?			
Luxury retail:		26.0%	13
Insurance:		34.0%	17
Builders merchants:		18.0%	9
NHS:		20.0%	10
Other (please specify):		2.0%	1
Loss adjusting			




4. Are you			
Student on the programme:		38.0%	19
Learning & development manager:		4.0%	2
Line manager:		26.0%	13
Senior manager:		14.0%	7
Other (please specify):		18.0%	9
<a href="#">View All Responses</a> - There are too many responses to display on this page and so all the responses to this question are available on a separate page.			













5. Prior to this corporate education programme being undertaken by the organisation, what level of qualification did you have at Higher Education level? (please answer even if you are not a student on the programme)			
None:		42.0%	21
Undergraduate qualification:		32.0%	16
Postgraduate qualification:		26.0%	13

6. How long have you worked for your current organisation?			
Less than 1 year:		2.0%	1
1-3 years:		16.0%	8
4-5 years:		12.0%	6
6+ years:		70.0%	35




7. If you are a student, how long have you been studying on the course?			
Up to 6 months:		0.0%	0
7-12 months:		8.0%	4
13-24 months:		32.0%	16
25-36 months:		14.0%	7
N/A:		46.0%	23









## Section 2: Expectations of Corporate Education











8. University Support			
8.a. Academic staff from the university should provide knowledge relevant to student's areas of work			
Strongly disagree:		0.0%	0
Disagree:		10.0%	5
Neither agree or disagree:		2.0%	1
Agree:		40.0%	20




Strongly agree:		48.0%	24
<b>8.b. Academic staff from the university should be experts in their field of study</b>			
Strongly disagree:		2.0%	1
Disagree:		0.0%	0
Neither agree or disagree:		4.0%	2
Agree:		24.0%	12
Strongly agree:		70.0%	35
<b>8.c. Academic staff from the university should provide regular feedback on student progress</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		4.0%	2
Agree:		30.0%	15
Strongly agree:		66.0%	33
<b>8.d. Academic staff from the university should contextualise the material to the organisation and its sector</b>			
Strongly disagree:		0.0%	0
Disagree:		4.0%	2
Neither agree or disagree:		4.0%	2
Agree:		48.0%	24
Strongly agree:		44.0%	22
<b>8.e. Academic staff from the university should assist students in applying theory to practice</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0


























Neither agree or disagree:		6.0%	3
Agree:		42.0%	21
Strongly agree:		52.0%	26










<b>9. Organisational Support</b>			
<b>9.a. Senior staff within the organisation should provide support to students</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		2.0%	1
Agree:		38.0%	19
Strongly agree:		60.0%	30
<b>9.b. Senior staff within the organisation should assist students with making wider connections within the organisation</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		12.0%	6
Agree:		36.0%	18
Strongly agree:		52.0%	26
<b>9.c. Line managers should provide sufficient time for academic study</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		6.0%	3
Agree:		40.0%	20




Strongly agree:		54.0%	27
<b>9.d.</b> Line managers should initiate regular 1:1 reviews with students to monitor progress			
Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree or disagree:		22.0%	11
Agree:		38.0%	19
Strongly agree:		38.0%	19
<b>9.e.</b> Line managers should provide feedback on assignments			
Strongly disagree:		2.0%	1
Disagree:		18.0%	9
Neither agree or disagree:		30.0%	15
Agree:		26.0%	13
Strongly agree:		24.0%	12

<b>10.</b> Return on Investment			
<b>10.a.</b> The course should provide return on investment for the organisation			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		2.0%	1
Agree:		48.0%	24
Strongly agree:		50.0%	25
<b>10.b.</b> The course should provide tangible outcomes from assignments or projects			

Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree nor disagree:		12.0%	6
Agree:		48.0%	24
Strongly agree:		38.0%	19
<b>10.c.</b> The course should improve student performance within the organisation			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		2.0%	1
Agree:		40.0%	20
Strongly agree:		58.0%	29
<b>10.d.</b> The course should improve student motivation within the organisation			
Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree nor disagree:		4.0%	2
Agree:		38.0%	19
Strongly agree:		56.0%	28
<b>11. Career Development</b>			
<b>11.a.</b> The course should enhance students' careers			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0




Neither agree nor disagree:		4.0%	2
Agree:		42.0%	21
Strongly agree:		54.0%	27
<b>11.b. The course should create a new talent pool within the organisation</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		4.0%	2
Agree:		40.0%	20
Strongly agree:		56.0%	28
<b>11.c. The course should improve succession planning within the organisation</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		6.0%	3
Agree:		40.0%	20
Strongly agree:		54.0%	27
<b>11.d. The course should require careful selection of participants</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		4.0%	2
Agree:		30.0%	15
Strongly agree:		66.0%	33

<b>12. Credibility</b>			
<b>12.a. The course should increasingly gain credibility within the organisation</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		2.0%	1
Agree:		46.0%	23
Strongly agree:		52.0%	26
<b>12.b. The course should increasingly gain credibility within the organisation's industry or sector</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		10.0%	5
Agree:		44.0%	22
Strongly agree:		46.0%	23
<b>12.c. The course should have high academic credibility within the education sector</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		6.0%	3
Agree:		48.0%	24
Strongly agree:		46.0%	23
<b>12.d. Students should achieve good academic success</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0



Neither agree nor disagree:		12.0%	6
Agree:		50.0%	25
Strongly agree:		38.0%	19

### 13. Collective Learning



#### 13.a. The course should enable students to learn from one another






Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		2.0%	1
Agree:		38.0%	19
Strongly agree:		60.0%	30








#### 13.b. The course should foster team-building within the student group









Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		0.0%	0
Agree:		40.0%	20
Strongly agree:		60.0%	30

#### 13.c. The course should provide opportunities for networking within the organisation

Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree or disagree:		2.0%	1
Agree:		40.0%	20

Strongly agree:		58.0%	29
<b>13.d.</b> The course should enable other employees to benefit from the knowledge gained by students on the course			
Strongly disagree:		0.0%	0
Disagree:		4.0%	2
Neither agree or disagree:		2.0%	1
Agree:		44.0%	22
Strongly agree:		50.0%	25






<b>14. Partnership</b>			
<b>14.a.</b> The university and the organisation should form a strong partnership in corporate education together			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		12.0%	6
Agree:		48.0%	24
Strongly agree:		40.0%	20
<b>14.b.</b> The university and the organisation should both be involved in the course design			
Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree nor disagree:		6.0%	3
Agree:		42.0%	21
Strongly agree:		50.0%	25
<b>14.c.</b> The university and the organisation should learn from one another in the process of delivering this course			

Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree nor disagree:		2.0%	1
Agree:		46.0%	23
Strongly agree:		50.0%	25
<b>14.d.</b> The university and the organisation should both feel a sense of ownership of the course			
Strongly disagree:		0.0%	0
Disagree:		2.0%	1
Neither agree nor disagree:		4.0%	2
Agree:		42.0%	21
Strongly agree:		52.0%	26

### Section 3: Ranking the Dimensions




















**15.** Please rank the various dimensions below in order of their importance (1 as the highest rank and 7 as the lowest rank). Please answer the questions whatever role you play within the organisation.




**15.a.** University support is an important feature of a corporate education programme

1:		24.0%	12
2:		20.0%	10
3:		22.0%	11
4:		10.0%	5
5:		8.0%	4






















6:		8.0%	4
7:		8.0%	4
<b>15.b.</b> Organisational support is an important feature of a corporate education programme			
1:		34.0%	17
2:		28.0%	14
3:		12.0%	6
4:		14.0%	7
5:		2.0%	1
6:		6.0%	3
7:		4.0%	2
<b>15.c.</b> Organisational return on investment is an important outcome of a corporate education programme			
1:		18.0%	9
2:		36.0%	18
3:		12.0%	6
4:		12.0%	6
5:		4.0%	2
6:		16.0%	8
7:		2.0%	1
<b>15.d.</b> Greater opportunities for student career development is an important outcome of a corporate education programme			
1:		26.0%	13
2:		20.0%	10
3:		10.0%	5




















4:		12.0%	6
5:		12.0%	6
6:		12.0%	6
7:		8.0%	4
<b>15.e.</b> An increased level of credibility within the organisation and its sector is an important feature of a corporate education programme			
1:		12.0%	6
2:		16.0%	8
3:		18.0%	9
4:		16.0%	8
5:		16.0%	8
6:		12.0%	6
7:		10.0%	5
<b>15.f.</b> An increased level of collective learning is an important outcome of a corporate education programme			
1:		18.0%	9
2:		22.0%	11
3:		14.0%	7
4:		10.0%	5
5:		18.0%	9
6:		12.0%	6
7:		6.0%	3
<b>15.g.</b> An increased level of partnership between the university and the organisation is an important outcome of a corporate education programme			
1:		20.0%	10





2:		4.0%	2
3:		6.0%	3
4:		12.0%	6
5:		18.0%	9
6:		16.0%	8
7:		24.0%	12










## Section 4: Perceptions of Corporate Education

<b>16. University Support</b>			
<b>16.a. Academic staff from the university have provided knowledge relevant to students' work</b>			
Strongly disagree:		0.0%	0
Disagree:		8.2%	4
Neither agree nor disagree:		12.2%	6
Agree:		61.2%	30
Strongly agree:		18.4%	9
<b>16.b. Academic staff from the university are experts in their field of study</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		14.6%	7
Agree:		56.2%	27

















Strongly agree:		29.2%	14
<b>16.c.</b> Academic staff from the university have provided regular feedback on student progress			
Strongly disagree:		0.0%	0
Disagree:		22.4%	11
Neither agree nor disagree:		20.4%	10
Agree:		44.9%	22
Strongly agree:		12.2%	6
<b>16.d.</b> Academic staff from the university have contextualised the material to the organisation and its sector			
Strongly disagree:		0.0%	0
Disagree:		8.2%	4
Neither agree nor disagree:		24.5%	12
Agree:		51.0%	25
Strongly agree:		16.3%	8
<b>16.e.</b> Academic staff from the university have assisted students in applying theory to practice			
Strongly disagree:		0.0%	0
Disagree:		12.2%	6
Neither agree nor disagree:		24.5%	12
Agree:		51.0%	25
Strongly agree:		12.2%	6
<b>17. Organisational Support</b>			
<b>17.a.</b> Senior staff within the organisation have provided support to students			

Strongly disagree:		4.1%	2
Disagree:		26.5%	13
Neither agree nor disagree:		24.5%	12
Agree:		32.7%	16
Strongly agree:		12.2%	6
<b>17.b. Senior staff within the organisation have assisted students with making wider connections within the organisation</b>			
Strongly disagree:		6.1%	3
Disagree:		26.5%	13
Neither agree nor disagree:		28.6%	14
Agree:		26.5%	13
Strongly agree:		12.2%	6
<b>17.c. Line managers have provided sufficient time for academic study</b>			
Strongly disagree:		8.2%	4
Disagree:		24.5%	12
Neither agree nor disagree:		14.3%	7
Agree:		40.8%	20
Strongly agree:		12.2%	6
<b>17.d. Line managers have initiated regular 1:1 reviews with students to monitor progress</b>			
Strongly disagree:		26.5%	13
Disagree:		42.9%	21
Neither agree nor disagree:		16.3%	8
Agree:		14.3%	7














Strongly agree:		0.0%	0
<b>17.e.</b> Line managers have provided feedback on assignments			
Strongly disagree:		32.7%	16
Disagree:		34.7%	17
Neither agree nor disagree:		20.4%	10
Agree:		12.2%	6
Strongly agree:		0.0%	0
















<b>18.</b> Return on Investment			
<b>18.a.</b> The course is likely to have provided return on investment for the organisation			
Strongly disagree:		2.0%	1
Disagree:		12.0%	6
Neither agree nor disagree:		18.0%	9
Agree:		60.0%	30
Strongly agree:		8.0%	4
<b>18.b.</b> The course has provided tangible outcomes from assignments or projects			
Strongly disagree:		0.0%	0
Disagree:		20.0%	10
Neither agree nor disagree:		22.0%	11
Agree:		48.0%	24
Strongly agree:		10.0%	5
<b>18.c.</b> The course has improved student performance within the organisation			

Strongly disagree:		0.0%	0
Disagree:		12.0%	6
Neither agree nor disagree:		10.0%	5
Agree:		52.0%	26
Strongly agree:		26.0%	13
<b>18.d.</b> The course has improved student motivation within the organisation			
Strongly disagree:		2.0%	1
Disagree:		12.0%	6
Neither agree nor disagree:		24.0%	12
Agree:		36.0%	18
Strongly agree:		26.0%	13
<b>19. Career Development</b>			
<b>19.a.</b> The course has enhanced students' careers			
Strongly disagree:		4.0%	2
Disagree:		18.0%	9
Neither agree nor disagree:		34.0%	17
Agree:		40.0%	20
Strongly agree:		4.0%	2
<b>19.b.</b> The course has created a new talent pool within the organisation			
Strongly disagree:		2.0%	1
Disagree:		20.0%	10












Neither agree nor disagree:		24.0%	12
Agree:		50.0%	25
Strongly agree:		4.0%	2
<b>19.c. The course has improved succession planning within the organisation</b>			
Strongly disagree:		4.0%	2
Disagree:		32.0%	16
Neither agree nor disagree:		38.0%	19
Agree:		22.0%	11
Strongly agree:		4.0%	2
<b>19.d. The course has benefited from careful selection of participants</b>			
Strongly disagree:		4.0%	2
Disagree:		30.0%	15
Neither agree nor disagree:		38.0%	19
Agree:		28.0%	14
Strongly agree:		0.0%	0
<b>20. Credibility</b>			
<b>20.a. The course has increasingly gained credibility within the organisation</b>			
Strongly disagree:		6.0%	3
Disagree:		16.0%	8
Neither agree nor disagree:		26.0%	13
Agree:		44.0%	22



Strongly agree:		8.0%	4
<b>20.b.</b> The course has increasingly gained credibility within the organisation's industry or sector			
Strongly disagree:		2.0%	1
Disagree:		24.0%	12
Neither agree nor disagree:		36.0%	18
Agree:		32.0%	16
Strongly agree:		6.0%	3
<b>20.c.</b> The course has high academic credibility within the education sector			
Strongly disagree:		0.0%	0
Disagree:		12.0%	6
Neither agree nor disagree:		48.0%	24
Agree:		34.0%	17
Strongly agree:		6.0%	3
<b>20.d.</b> Students have achieved good academic success			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		16.0%	8
Agree:		64.0%	32
Strongly agree:		20.0%	10
<b>21. Collective Learning</b>			
<b>21.a.</b> The course has enabled students to learn from one another			

Strongly disagree:		0.0%	0
Disagree:		4.0%	2
Neither agree nor disagree:		6.0%	3
Agree:		60.0%	30
Strongly agree:		30.0%	15
<b>21.b. The course has fostered team-building within the student group</b>			
Strongly disagree:		2.0%	1
Disagree:		0.0%	0
Neither agree nor disagree:		6.0%	3
Agree:		50.0%	25
Strongly agree:		42.0%	21
<b>21.c. The course has provided opportunities for wider networking within the organisation</b>			
Strongly disagree:		0.0%	0
Disagree:		10.0%	5
Neither agree nor disagree:		16.0%	8
Agree:		42.0%	21
Strongly agree:		32.0%	16
<b>21.d. The course has enabled other employees to benefit from the knowledge gained by students on the course</b>			
Strongly disagree:		0.0%	0
Disagree:		10.0%	5
Neither agree nor disagree:		24.0%	12
Agree:		50.0%	25

Strongly agree:		16.0%	8
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<b>22. Partnership</b>			
<b>22.a. The university and the organisation have formed a strong partnership in corporate education together</b>			
Strongly disagree:		0.0%	0
Disagree:		4.0%	2
Neither agree nor disagree:		40.0%	20
Agree:		48.0%	24
Strongly agree:		8.0%	4
<b>22.b. The university and the organisation have both been involved in the design of the course</b>			
Strongly disagree:		0.0%	0
Disagree:		0.0%	0
Neither agree nor disagree:		32.0%	16
Agree:		58.0%	29
Strongly agree:		10.0%	5
<b>22.c. The university and the organisation have learned from one another through the delivery of this course</b>			
Strongly disagree:		2.0%	1
Disagree:		0.0%	0
Neither agree nor disagree:		38.0%	19
Agree:		46.0%	23
Strongly agree:		14.0%	7
<b>22.d. The university and the organisation have a sense of ownership of the course</b>			

Strongly disagree:		0.0%	0
Disagree:		6.0%	3
Neither agree nor disagree:		38.0%	19
Agree:		46.0%	23
Strongly agree:		10.0%	5

**23.** Overall, how satisfied have you been with this course? (please answer whether or not you have been a student on the course)

Very unsatisfied:		4.0%	2
Unsatisfied:		0.0%	0
Neither satisfied nor unsatisfied:		18.0%	9
Satisfied:		60.0%	30
Very satisfied:		18.0%	9

**24.** Are there any other issues relating to expectations, not mentioned above, that you think are important in evaluating your corporate education programme?

[View All Responses](#)

- There are too many responses to display on this page and so all the responses to this question are available on a separate page.

**25.** Are there any other issues relating to perceptions, not mentioned above, that you think are important in evaluating your corporate education programme?

[View All Responses](#)

- There are too many responses to display on this page and so all the responses to this question are available on a separate page.

## Appendix 15

### Stage Two Questionnaire - Overall Analysis Overall Results from all Four Organisations

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.58	3.23	1.35	1
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.40	3.11	1.29	1
Q9c Line managers should provide sufficient time for academic study	4.48	3.24	1.24	1
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.12	2.17	1.95	1
Q9e Line Managers should provide feedback on assignments	3.52	2.11	1.41	1
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.26	3.91	0.35	2=
Q8b Academic staff from the university should be experts in their field of study	4.60	4.14	0.46	2=
Q8c Academic staff from the university should provide regular feedback on student progress	4.62	3.47	1.15	2=
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.32	3.75	0.57	2=
Q8e Academic staff members from the university should assist students in applying theory to practice	4.46	3.63	0.83	2=
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.48	3.60	0.88	2=
Q10b The course should provide tangible outcomes from assignments or projects	4.22	3.48	0.74	2=
Q10c The course should improve student performance within the organisation	4.56	3.92	0.64	2=
Q10d The course should improve student motivation within the organisation	4.48	3.72	0.76	2=
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.50	3.22	1.28	4
Q11b The course should create a new talent pool within the organisation	4.52	3.34	1.18	4
Q11c The course should improve succession planning within the organisation	4.48	2.90	1.58	4
Q11d The course should require careful selection of participants	4.62	2.90	1.72	4
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.58	4.16	0.42	5
Q13b The course should foster team-building within the student group	4.60	4.30	0.30	5
Q13c The course should provide opportunities for networking within the organisation	4.56	3.96	0.60	5
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.40	3.72	0.68	5
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.50	3.32	1.18	6
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.36	3.16	1.20	6
Q12c The course should have high academic credibility within the education sector	4.40	3.34	1.06	6

Q12d Students should achieve good academic success	4.26	4.04	0.22	6
<b>Partnership</b>				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.28	3.60	0.68	7
Q14b The university and the organisation should both be involved in the course design	4.40	3.78	0.62	7
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.44	3.70	0.74	7
Q14d The university and the organisation should both feel a sense of ownership of the course	4.44	3.60	0.84	7

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

<b>Importance</b>		
<b>Dimension</b>	<b>Percentage</b>	<b>Rank</b>
Organisational support	74%	1
University support	66%	2=
Return on investment	66%	2=
Career development	56%	4
Collective learning	54%	5
Credibility	46%	6
Partnership	30%	7

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

<b>Overall Satisfaction</b>	
<b>Weighted Average</b>	<b>Percentage Satisfied</b>
3.88	78%

## Biographical Data

Gender		
Male	48%	Comment: a fairly even split between male and female with a marginal emphasis on female
Female	52%	
Age Bracket		
18-30	18%	Comment: the majority of respondents fall within the 31-50 and 41-50 brackets
31-40	38%	
41-50	36%	
51-60	8%	
61+	0%	
Sector		
Luxury retail	26%	Comment: A reasonable spread from the four participating organisations with a higher number from the insurance sector.
Insurance	36%	
Builders Merchants	18%	
NHS	20%	
Stakeholder		
Student	50%	Comment: The highest group of respondents comprise students on the programme. Line and senior managers taken together are also well represented. L&D representation is low.
L&D manager	6%	
Line manager	26%	
Senior manager	18%	
Qualification		
None	42%	Comment: A mixed set of results. The highest group of respondents have no HE qualification. A reasonable percentage of respondents have either an undergraduate or postgraduate qualification.
Undergraduate	32%	
Postgraduate	26%	
Length of Tenure		
<1 year	2%	Comment: The majority of respondents have worked for their organisation for more than six years.
1-3 years	16%	
4-5 years	12%	
6+ years	70%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for more than one year.
7-12 months	8%	
13-24 months	32%	
25-36 months	14%	
N/A	46%	

## Appendix 16

### Stage Two Questionnaire – Luxury Retail Analysis

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.85	3.92	0.93	3
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.85	4.00	0.85	3
Q9c Line managers should provide sufficient time for academic study	4.69	3.93	0.76	3
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.54	2.93	1.61	3
Q9e Line Managers should provide feedback on assignments	4.23	2.94	1.29	3
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.69	4.00	0.69	4
Q8b Academic staff from the university should be experts in their field of study	4.92	4.26	0.66	4
Q8c Academic staff from the university should provide regular feedback on student progress	4.92	3.69	1.23	4
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.46	4.00	0.46	4
Q8e Academic staff members from the university should assist students in applying theory to practice	4.62	3.24	1.38	4
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.69	3.60	1.09	1=
Q10b The course should provide tangible outcomes from assignments or projects	4.54	3.68	0.86	1=
Q10c The course should improve student performance within the organisation	4.77	3.69	1.08	1=
Q10d The course should improve student motivation within the organisation	4.85	3.85	1.00	1=
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.77	3.08	1.69	1=
Q11b The course should create a new talent pool within the organisation	4.53	3.46	1.07	1=
Q11c The course should improve succession planning within the organisation	4.54	2.99	1.55	1=
Q11d The course should require careful selection of participants	4.92	3.37	1.55	1=
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.69	4.01	0.68	7
Q13b The course should foster team-building within the student group	4.85	4.06	0.79	7
Q13c The course should provide opportunities for networking within the organisation	4.92	4.30	0.62	7
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.85	4.00	0.85	7
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.77	3.91	0.86	5
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.53	3.68	0.85	5
Q12c The course should have high academic credibility within the education sector	4.61	3.46	1.15	5
Q12d Students should achieve good academic success	4.62	4.08	0.54	5



Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.54	3.85	0.69	6
Q14b The university and the organisation should both be involved in the course design	4.85	4.00	0.85	6
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.77	3.92	0.85	6
Q14d The university and the organisation should both feel a sense of ownership of the course	4.69	4.08	0.61	6

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	62%	3
University support	54%	4
Return on investment	69%	1=
Career development	69%	1=
Collective learning	31%	7
Credibility	46%	5
Partnership	39%	6

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
3.84	69%

## Biographical Data

Gender		
Male	46%	Comment: a fairly even split between male and female with a marginal emphasis on female
Female	54%	
Age Bracket		
18-30	62%	Comment: 100% of respondents fall within the 18-40 bracket
31-40	38%	
41-50	0%	
51-60	0%	
61+	0%	
Sector		
Luxury retail	100%	100% of respondents fall within the luxury retail bracket
Insurance	0%	
Builders Merchants	0%	
NHS	0%	
Stakeholder		
Student	47%	Comment: The highest group of respondents comprise students on the programme. However, line managers are also well represented. L&D representation is low. No senior managers took part in the survey from luxury retail
L&D manager	16%	
Line manager	37%	
Senior manager	0%	
Qualification		
None	23%	Comment: The majority of respondents already have an undergraduate degree
Undergraduate	54%	
Postgraduate	23%	
Length of Tenure		
<1 year	0%	Comment: The majority of respondents have worked for their organisation for between 1-3 years
1-3 years	46%	
4-5 years	31%	
6+ years	23%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for 7-12 months
7-12 months	23%	
13-24 months	8%	
25-36 months	8%	
N/A	61%	

## Appendix 17

### Stage Two Questionnaire – Insurance Company Analysis

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.23	3.38	0.85	1
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.01	3.14	0.87	1
Q9c Line managers should provide sufficient time for academic study	4.41	3.19	1.22	1
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	3.77	2.01	1.76	1
Q9e Line Managers should provide feedback on assignments	3.01	2.06	0.95	1
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.05	3.83	0.22	2=
Q8b Academic staff from the university should be experts in their field of study	4.47	4.01	0.46	2=
Q8c Academic staff from the university should provide regular feedback on student progress	4.17	3.24	0.93	2=
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	3.93	3.76	0.17	2=
Q8e Academic staff members from the university should assist students in applying theory to practice	4.35	3.94	0.41	2=
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.23	3.64	0.59	4=
Q10b The course should provide tangible outcomes from assignments or projects	3.83	3.24	0.59	4=
Q10c The course should improve student performance within the organisation	4.29	4.11	0.18	4=
Q10d The course should improve student motivation within the organisation	4.05	3.64	0.41	4=
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.41	3.36	1.05	4=
Q11b The course should create a new talent pool within the organisation	4.47	3.29	1.18	4=
Q11c The course should improve succession planning within the organisation	4.41	2.95	1.46	4=
Q11d The course should require careful selection of participants	4.53	2.65	1.88	4=
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.59	4.35	0.24	2=
Q13b The course should foster team-building within the student group	4.53	4.41	0.12	2=
Q13c The course should provide opportunities for networking within the organisation	4.41	3.99	0.42	2=
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.23	3.65	0.58	2=
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.29	3.35	0.94	6
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.17	3.05	1.12	6
Q12c The course should have high academic credibility within the education sector	4.29	3.35	0.94	6
Q12d Students should achieve good academic success	4.05	3.82	0.23	6

Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.05	3.59	0.46	7
Q14b The university and the organisation should both be involved in the course design	4.11	3.77	0.34	7
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.23	3.59	0.64	7
Q14d The university and the organisation should both feel a sense of ownership of the course	4.17	3.65	0.52	7

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	76%	1
University support	70%	2=
Return on investment	64%	4=
Career development	64%	4=
Collective learning	70%	2=
Credibility	48%	6
Partnership	20%	7

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
4.17	94%

## Biographical Data

Gender		
Male	53%	Comment: A fairly even split between male and female with a marginal emphasis on male
Female	47%	
Age Bracket		
18-30	0%	Comment: The majority of respondents fall within the 31-40 bracket with a reasonable number in the 41-50 bracket
31-40	59%	
41-50	29%	
51-60	12%	
61+	0%	
Sector		
Luxury retail	0%	Comment: 100% of respondents fall within the insurance bracket
Insurance	100%	
Builders Merchants	0%	
NHS	0%	
Stakeholder		
Student	47%	Comment: The highest group of respondents comprise students on the programme. However, senior managers and line managers are also well represented. L&D representation is low
L&D manager	6%	
Line manager	18%	
Senior manager	29%	
Qualification		
None	30%	Comment: The highest group of respondents already have an undergraduate degree, whereas a reasonable number have no degree or a postgraduate degree
Undergraduate	41%	
Postgraduate	29%	
Length of Tenure		
<1 year	0%	Comment: The majority of respondents have worked for their organisation for more than 6 years
1-3 years	6%	
4-5 years	6%	
6+ years	88%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for 13-24 months
7-12 months	6%	
13-24 months	29%	
25-36 months	17%	
N/A	48%	

## Appendix 18

### Stage Two Questionnaire - Builders Merchants Analysis

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.56	3.11	1.45	1=
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.34	2.88	1.46	1=
Q9c Line managers should provide sufficient time for academic study	4.45	3.34	1.11	1=
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.23	2.11	2.12	1=
Q9e Line Managers should provide feedback on assignments	3.68	1.77	1.91	1=
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.01	3.78	0.23	1=
Q8b Academic staff from the university should be experts in their field of study	4.56	4.00	0.56	1=
Q8c Academic staff from the university should provide regular feedback on student progress	5.00	2.77	2.23	1=
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.67	3.45	1.22	1=
Q8e Academic staff members from the university should assist students in applying theory to practice	4.45	3.23	1.22	1=
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.33	4.00	0.33	5=
Q10b The course should provide tangible outcomes from assignments or projects	4.22	3.89	0.33	5=
Q10c The course should improve student performance within the organisation	4.67	4.22	0.45	5=
Q10d The course should improve student motivation within the organisation	4.44	4.11	0.33	5=
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.45	3.34	1.11	3
Q11b The course should create a new talent pool within the organisation	4.33	3.67	0.66	3
Q11c The course should improve succession planning within the organisation	4.45	3.22	1.23	3
Q11d The course should require careful selection of participants	4.45	3.11	1.34	3
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.22	3.89	0.33	4
Q13b The course should foster team-building within the student group	4.22	4.00	0.22	4
Q13c The course should provide opportunities for networking within the organisation	4.11	3.49	0.62	4
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	3.78	3.34	0.44	4
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.33	3.45	0.88	5=
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.22	3.23	0.99	5=
Q12c The course should have high academic credibility within the education sector	4.00	3.22	0.78	5=
Q12d Students should achieve good academic success	4.11	4.22	-0.11	5=

Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	3.89	3.44	0.45	5=
Q14b The university and the organisation should both be involved in the course design	4.22	3.44	0.78	5=
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.22	3.41	0.81	5=
Q14d The university and the organisation should both feel a sense of ownership of the course	4.22	3.22	1.00	5=

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	78%	1=
University support	78%	1=
Return on investment	44%	5=
Career development	66%	3
Collective learning	56%	4
Credibility	44%	5=
Partnership	44%	5=

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
3.56	56%

## Biographical Data

Gender		
Male	78%	Comment: the majority of the respondents are male
Female	22%	
18-30	11%	Comment: The majority of the respondents fall within the 41-50 bracket
31-40	22%	
41-50	67%	
51-60	0%	
61+	0%	
Luxury retail	0%	Comment: 100% of respondents fall within the builders merchants bracket
Insurance	0%	
Builders Merchants	100%	
NHS	0%	
Student	33%	Comment: The highest group of respondents comprise line managers. However, students are also well represented. L&D representation is not represented
L&D manager	0%	
Line manager	56%	
Senior manager	11%	
None	89%	Comment: The large majority of respondents had no degree prior to the corporate education programme whilst a small number had an undergraduate degree
Undergraduate	11%	
Postgraduate	0%	
<1 year	0%	Comment: All respondents have worked for their organisation for over 6 years
1-3 years	0%	
4-5 years	0%	
6+ years	100%	
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for 13-24 months
7-12 months	0%	
13-24 months	45%	
25-36 months	11%	
N/A	44%	



## Appendix 19

### Stage Two Questionnaire – NHS Hospital Analysis

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.80	2.20	2.60	1
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.60	2.20	2.40	1
Q9c Line managers should provide sufficient time for academic study	4.40	2.50	1.90	1
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.20	1.70	2.50	1
Q9e Line Managers should provide feedback on assignments	3.30	1.60	1.70	1
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.20	3.90	0.30	3
Q8b Academic staff from the university should be experts in their field of study	4.40	4.30	0.10	3
Q8c Academic staff from the university should provide regular feedback on student progress	4.60	4.10	0.50	3
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.40	3.70	0.70	3
Q8e Academic staff members from the university should assist students in applying theory to practice	4.40	3.60	0.80	3
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.70	3.10	1.60	2
Q10b The course should provide tangible outcomes from assignments or projects	4.50	3.20	1.30	2
Q10c The course should improve student performance within the organisation	4.60	3.50	1.10	2
Q10d The course should improve student motivation within the organisation	4.70	3.30	1.40	2
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.30	3.10	1.20	6
Q11b The course should create a new talent pool within the organisation	4.70	2.90	1.80	6
Q11c The course should improve succession planning within the organisation	4.50	2.40	2.10	6
Q11d The course should require careful selection of participants	4.50	2.50	2.00	6
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.70	4.20	0.50	4
Q13b The course should foster team-building within the student group	4.70	4.60	0.10	4
Q13c The course should provide opportunities for networking within the organisation	4.70	3.80	0.90	4
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.60	3.80	0.80	4
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.60	2.50	2.10	5
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.50	2.60	1.90	5
Q12c The course should have high academic credibility within the education sector	4.60	3.30	1.30	5
Q12d Students should achieve good academic success	4.20	4.10	0.10	5

Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.60	3.30	1.30	7
Q14b The university and the organisation should both be involved in the course design	4.40	3.70	0.70	7
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.50	3.70	0.80	7
Q14d The university and the organisation should both feel a sense of ownership of the course	4.70	3.10	1.60	7

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	90%	1
University support	70%	3
Return on investment	80%	2
Career development	20%	6
Collective learning	50%	4
Credibility	30%	5
Partnership	10%	7

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
4.00	90%

## Biographical Data

Gender		
Male	10%	Comment: the majority of the respondents fall within the female category
Female	90%	
Age Bracket		
18-30	0%	Comment: the majority of respondents fall within the 41-50 bracket
31-40	20%	
41-50	60%	
51-60	20%	
61+	0%	
Sector		
Luxury retail	0%	Comment: 100% of respondents within the NHS bracket
Insurance	0%	
Builders Merchants	0%	
NHS	100%	
Stakeholder		
Student	80%	Comment: The highest group of respondents comprise students on the programme
L&D manager	0%	
Line manager	10%	
Senior manager	10%	
Qualification		
None	40%	Comment: The majority of respondents already had a postgraduate degree, whilst a many had no HE qualification. Some students on the MA programme may already have had a postgraduate qualification in nursing prior to starting the corporate education programme
Undergraduate	10%	
Postgraduate	50%	
Length of Tenure		
<1 year	10%	Comment: The majority of respondents have worked for their organisation for 6+ years
1-3 years	10%	
4-5 years	10%	
6+ years	70%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for 13-24 months
7-12 months	0%	
13-24 months	60%	
25-36 months	10%	
N/A	30%	

## Appendix 20

### Stage Two Questionnaire – Stakeholders (Students)

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.64	2.94	1.70	
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.41	2.97	1.44	
Q9c Line managers should provide sufficient time for academic study	4.58	2.95	1.63	
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.16	1.83	2.33	
Q9e Line Managers should provide feedback on assignments	3.27	1.90	1.37	
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.15	3.68	0.47	
Q8b Academic staff from the university should be experts in their field of study	4.79	4.22	0.57	
Q8c Academic staff from the university should provide regular feedback on student progress	4.69	3.58	1.11	
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.53	3.85	0.68	
Q8e Academic staff members from the university should assist students in applying theory to practice	4.74	3.63	1.11	
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.43	3.43	1.00	
Q10b The course should provide tangible outcomes from assignments or projects	4.11	3.38	0.73	
Q10c The course should improve student performance within the organisation	4.53	3.89	0.64	
Q10d The course should improve student motivation within the organisation	4.43	3.96	0.47	
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.48	3.21	1.27	
Q11b The course should create a new talent pool within the organisation	4.48	3.37	1.11	
Q11c The course should improve succession planning within the organisation	4.53	2.96	1.57	
Q11d The course should require careful selection of participants	4.74	2.68	2.06	
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.48	4.08	0.40	
Q13b The course should foster team-building within the student group	4.68	4.21	0.47	
Q13c The course should provide opportunities for networking within the organisation	4.53	3.98	0.55	
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.38	3.67	0.71	
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.53	3.23	1.30	
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.48	3.06	1.42	
Q12c The course should have high academic credibility within the education sector	4.47	3.32	1.15	
Q12d Students should achieve good academic success	4.37	3.95	0.42	

Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.37	3.68	0.69	
Q14b The university and the organisation should both be involved in the course design	4.53	3.88	0.65	
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.43	3.88	0.55	
Q14d The university and the organisation should both feel a sense of ownership of the course	4.58	3.59	0.99	

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	74%	1
University support	66%	3=
Return on investment	66%	2
Career development	56%	3=
Collective learning	54%	6
Credibility	46%	5
Partnership	30%	7

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
3.80	74%

## Biographical Data

Gender		
Male	42%	Comment: a fairly even split between male and female with a marginal emphasis on female
Female	58%	
Age Bracket		
18-30	16%	Comment: the majority of respondents fall within the 31-50 and 41-50 brackets
31-40	37%	
41-50	47%	
51-60	0%	
61+	0%	
Sector		
Luxury retail	21%	Comment: A reasonable spread from the four participating organisations with a higher number from the insurance sector.
Insurance	42%	
Builders Merchants	16%	
NHS	21%	
Stakeholder		
Student	100%	Comment: The highest group of respondents comprise students on the programme. Line and senior managers taken together are also well represented. L&D representation is low.
L&D manager	0%	
Line manager	0%	
Senior manager	0%	
Qualification		
None	36%	Comment: A mixed set of results. The highest group of respondents have no HE qualification. A good percentage of respondents have either an undergraduate or postgraduate qualification.
Undergraduate	32%	
Postgraduate	32%	
Length of Tenure		
<1 year	0%	Comment: The majority of respondents have worked for their organisation for more than six years.
1-3 years	21%	
4-5 years	11%	
6+ years	68%	
Time on Course		
Up to 6 months	0%	Comment: The majority of respondents who have been students on a corporate education course have studied for more than one year.
7-12 months	16%	
13-24 months	58%	
25-36 months	26%	
N/A	0%	

## Appendix 21

### Stage Two Questionnaire – Stakeholders (L&D, Line, Senior)

Survey Question	E	P	Gap	Imp
<b>Organisational Support</b>				
Q9a Senior staff members within the organisation should provide support to students	4.46	3.47	0.99	
Q9b Senior staff within the organisation should assist students with making connections within the organisation	4.37	3.31	1.06	
Q9c Line managers should provide sufficient time for academic study	4.45	3.67	0.78	
Q9d Line managers should initiate regular 1:1 reviews with students to monitor progress	4.03	2.58	1.45	
Q9e Line Managers should provide feedback on assignments	3.58	2.45	1.13	
<b>University Support</b>				
Q8a Academic staff from the university should provide knowledge relevant to students' areas of work	4.22	3.96	0.26	
Q8b Academic staff from the university should be experts in their field of study	4.43	4.00	0.43	
Q8c Academic staff from the university should provide regular feedback on student progress	4.63	3.27	1.36	
Q8d Academic staff from the university should contextualise the material to the organisation and its sector	4.22	3.57	0.65	
Q8e Academic staff members from the university should assist students in applying theory to practice	4.22	3.52	0.70	
<b>Return on Investment</b>				
Q10a The course should provide return on investment for the organisation	4.36	3.85	0.51	
Q10b The course should provide tangible outcomes from assignments or projects	4.09	3.67	0.42	
Q10c The course should improve student performance within the organisation	4.49	3.95	0.54	
Q10d The course should improve student motivation within the organisation	4.46	3.89	0.57	
<b>Career Development</b>				
Q11a The course should enhance students' careers	4.49	3.29	1.20	
Q11b The course should create a new talent pool within the organisation	4.45	3.26	1.19	
Q11c The course should improve succession planning within the organisation	4.41	2.93	1.48	
Q11d The course should require careful selection of participants	4.54	2.97	1.57	
<b>Collective Learning</b>				
Q13a The course should enable students to learn from one another	4.54	4.13	0.41	
Q13b The course should foster team-building within the student group	4.41	4.22	0.19	
Q13c The course should provide opportunities for networking within the organisation	4.41	3.86	0.55	
Q13d The course should enable other employees to benefit from the knowledge gained by students on the course	4.30	3.66	0.64	
<b>Credibility</b>				
Q12a The course should increasingly gain credibility within the organisation	4.41	3.52	0.89	
Q12b The course should increasingly gain credibility within the organisation's industry or sector	4.18	3.28	0.90	
Q12c The course should have high academic credibility within the education sector	4.22	3.28	0.94	
Q12d Students should achieve good academic success	4.09	4.04	0.05	

Partnership				
Q14a The university and the organisation should form a strong partnership in corporate education together	4.14	3.49	0.65	
Q14b The university and the organisation should both be involved in the course design	4.31	3.69	0.62	
Q14c The university and the organisation should learn from one another in the process of delivering this course	4.40	3.43	0.97	
Q14d The university and the organisation should both feel a sense of ownership of the course	4.17	3.63	0.54	

**Key:**

E	Expectation – weighted average
P	Perception – weighted average
Gap	Gap between E and P
Imp	Importance by rank (1 as highest; 7 as lowest)
Highlighted	Gap scores above 1.00 (areas for discussion)

Importance		
Dimension	Percentage	Rank
Organisational support	74%	1=
University support	66%	1=
Return on investment	66%	5
Career development	56%	3
Collective learning	54%	4
Credibility	46%	6
Partnership	30%	7

*Comment: Rankings based on top 3 responses, as expressed by percentage.*

Overall Satisfaction	
Weighted Average	Percentage Satisfied
3.84	73%



## Biographical Data

Gender		
Male	50%	Comment: an even split between male and female
Female	50%	
Age Bracket		
18-30	18%	Comment: the majority of respondents fall within the 31-40 and 41-50 brackets
31-40	41%	
41-50	27%	
51-60	14%	
61+	0%	
Sector		
Luxury retail	27%	Comment: A reasonable spread from the four participating organisations with a higher number from the insurance sector.
Insurance	36%	
Builders Merchants	27%	
NHS	10%	
Stakeholder		
Student	0%	Comment: The highest group of respondents comprise line managers. Senior managers are also well represented. L&D representation is low.
L&D manager	9%	
Line manager	59%	
Senior manager	32%	
Qualification		
None	45%	Comment: A mixed set of results. The highest group of respondents have no HE qualification. A good percentage of respondents have either an undergraduate or postgraduate qualification.
Undergraduate	32%	
Postgraduate	23%	
Length of Tenure		
<1 year	0%	Comment: The majority of respondents have worked for their organisation for more than six years.
1-3 years	9%	
4-5 years	9%	
6+ years	82%	
Time on Course		
Up to 6 months	0%	Comment: This section is not applicable.
7-12 months	0%	
13-24 months	0%	
25-36 months	0%	
N/A	100%	

## Appendix 22

### Cronbach Alpha Results - SPSS

#### University Support Expectations 8a – 8e

Reliability Statistics

Cronbach's Alpha	N of Items
.736	5

#### Organisational Support Expectations 9a – 9e

Reliability Statistics

Cronbach's Alpha	N of Items
.734	5

### **Return on Investment Expectations 10a – 10d**

#### **Reliability Statistics**

Cronbach's Alpha	N of Items
.792	4

### **Career Development Expectations 11a – 11d**

#### **Reliability Statistics**

Cronbach's Alpha	N of Items
.777	4

### **Credibility Expectations 12a – 12d**

#### **Reliability Statistics**

Cronbach's Alpha	N of Items
.840	4

### Collective Learning Expectations 13a – 13d

#### Reliability Statistics

Cronbach's Alpha	N of Items
.806	4

### Partnership Expectations 14a – 14d

#### Reliability Statistics

Cronbach's Alpha	N of Items
.886	4

## Appendix 23

### Confirmatory Factor Analysis

#### KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.	.634
Approx. Chi-Square	1017.297
Bartlett's Test of Sphericity df	435
Sig.	.000

#### Communalities

	Initial	Extraction
8a Staff Knowledge	1.000	.702
8b Staff Expertise	1.000	.747
8c Staff Feedback	1.000	.754
8d Staff Contextualise	1.000	.743
8e Staff Theory Practice	1.000	.730
9a Org Staff Support	1.000	.850
9b Org Staff Connections	1.000	.881
9c Org Staff Study Time	1.000	.766
9d Org Staff 1:1s	1.000	.712
9e Org Staff Feedback	1.000	.751
10a ROI	1.000	.849
10b ROI Outcomes Projects	1.000	.872

10c ROI Student Performance	1.000	.674
10d ROI Student Motivation	1.000	.679
11a CD Improve Careers	1.000	.819
11b CD Talent Pool	1.000	.811
11c CD Succession	1.000	.847
11d CD Selection	1.000	.836
12a CR Credibility	1.000	.858
12b CR Cred Sector	1.000	.875
12c CR Cred Ed Sector	1.000	.765
12d CR Acad Success	1.000	.835
13a CL Learning	1.000	.888
13b CL Team	1.000	.817
13c CL Networking	1.000	.874
13d CL Benefit Others	1.000	.831
14a PT Partnership	1.000	.762
14b PT Course Design	1.000	.841
14c PT Delivery	1.000	.841
14d PT Ownership	1.000	.822

Rotated Component Matrix<sup>a</sup>

	Component									
	1	2	3	4	5	6	7	8	9	10
14b PT Course Design	.857									
14c PT Delivery	.845									
14d PT Ownership	.756									
14a PT Partnership	.631									
8b Staff Expertise										
11a CD Improve Careers		.837								
11c CD Succession		.829								
11b CD Talent Pool		.796								
13d CL Benefit Others			.827							
13c CL Networking			.662							
12c CR Cred Ed Sector										
12b CR Cred Sector				.776						
12a CR Credibility				.755						
11d CD Selection				.728						
10b ROI Outcomes Projects					.877					
10a ROI					.688					
10d ROI Student Motivation					.499					
9e Org Staff Feedback						.669				
9d Org Staff 1:1s						.654				
10c ROI Student Performance										
8a Staff Knowledge										
9b Org Staff Connections							.802			

9a Org Staff Support							.660			
8c Staff Feedback							.654			
13a CL Learning								.909		
13b CL Team								.740		
9c Org Staff Study Time									.793	
12d CR Acad Success										
8e Staff Theory Practice										.779
8d Staff Contextualise										.622

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 19 iterations.



## Appendix 24

### Chi-Square Analysis

Cross Tabulation - Gender	Chi Square	df	Hypothesis
<b>Expectations</b>			
University Support 8a	2.090	3	H <sub>o</sub>
University Support 8b	2.514	3	H <sub>o</sub>
University Support 8c	.551	2	H <sub>o</sub>
University Support 8d	5.064	3	H <sub>o</sub>
University Support 8e	3.589	2	H <sub>o</sub>
Organisational Support 9a	1.930	2	H <sub>o</sub>
Organisational Support 9b	1.204	2	H <sub>o</sub>
Organisational Support 9c	1.381	2	H <sub>o</sub>
Organisational Support 9d	3.112	3	H <sub>o</sub>
Organisational Support 9e	4.620	4	H <sub>o</sub>
Return on Investment 10a	2.784	2	H <sub>o</sub>
Return on Investment 10b	3.074	3	H <sub>o</sub>
Return on Investment 10c	3.588	2	H <sub>o</sub>
Return on Investment 10d	3.550	3	H <sub>o</sub>
Career Development 11a	2.930	2	H <sub>o</sub>
Career Development 11b	2.495	2	H <sub>o</sub>
Career Development 11c	1.381	2	H <sub>o</sub>
Career Development 11d	2.263	2	H <sub>o</sub>
Credibility 12a	1.581	2	H <sub>o</sub>
Credibility 12b	.164	2	H <sub>o</sub>
Credibility 12c	.646	2	H <sub>o</sub>
Credibility 12d	1.001	2	H <sub>o</sub>
Collective Learning 13a	.974	2	H <sub>o</sub>
Collective Learning 13b	.053	1	H <sub>o</sub>
Collective Learning 13c	1.985	2	H <sub>o</sub>
Collective Learning 13d	3.467	3	H <sub>o</sub>

Partnership 14a	.888	2	H <sub>o</sub>
Partnership 14b	1.343	3	H <sub>o</sub>
Partnership 14c	3.372	3	H <sub>o</sub>
Partnership 14d	.969	3	H <sub>o</sub>
<b>Perceptions</b>			
University Support 16a	1.734	3	H <sub>o</sub>
University Support 16b	.996	2	H <sub>o</sub>
University Support 16c	.637	3	H <sub>o</sub>
University Support 16d	3.021	3	H <sub>o</sub>
University Support 16e	1.194	3	H <sub>o</sub>
Organisational Support 17a	2.904	4	H <sub>o</sub>
Organisational Support 17b	.922	4	H <sub>o</sub>
Organisational Support 17c	4.309	4	H <sub>o</sub>
Organisational Support 17d	4.027	3	H <sub>o</sub>
Organisational Support 17e	1.196	3	H <sub>o</sub>
Return on Investment 18a	8.511	4	H <sub>o</sub>
Return on Investment 18b	3.210	3	H <sub>o</sub>
Return on Investment 18c	11.251	3	H <sup>1</sup>
Return on Investment 18c (Recode)	11.239	2	H <sup>1</sup>
Return on Investment 18d	4.072	4	H <sub>o</sub>
Career Development 19a	10.397	2	H <sup>1</sup>
Career Development 19a (Recode)	3.763	3	H <sub>o</sub>
Career Development 19b	6.824	4	H <sub>o</sub>
Career Development 19c	5.471	4	H <sub>o</sub>
Career Development 19d	1.928	3	H <sub>o</sub>
Credibility 20a	2.632	4	H <sub>o</sub>
Credibility 20b	5.262	4	H <sub>o</sub>
Credibility 20c	.980	3	H <sub>o</sub>
Credibility 20d	2.324	2	H <sub>o</sub>
Collective Learning 21a	8.734	3	H <sup>1</sup>
Collective Learning 21a (Recode)	3.926	2	H <sub>o</sub>
Collective Learning 21b	1.343	3	H <sub>o</sub>
Collective Learning 21c	2.064	3	H <sub>o</sub>
Collective Learning 21d	1.623	3	H <sub>o</sub>

Partnership 22a	3.392	3	H <sub>o</sub>
Partnership 22b	1.156	2	H <sub>o</sub>
Partnership 22c	3.571	3	H <sub>o</sub>
Partnership 22d	2.164	3	H <sub>o</sub>

Cross Tabulation - Age	Chi Square	df	Hypothesis
<b>Expectations</b>			
University Support 8a	7.440	9	H <sub>o</sub>
University Support 8b	12.002	9	H <sub>o</sub>
University Support 8c	4.045	6	H <sub>o</sub>
University Support 8d	8.070	9	H <sub>o</sub>
University Support 8e	6.926	6	H <sub>o</sub>
Organisational Support 9a	4.094	6	H <sub>o</sub>
Organisational Support 9b	9.825	6	H <sub>o</sub>
Organisational Support 9c	5.361	6	H <sub>o</sub>
Organisational Support 9d	6.038	9	H <sub>o</sub>
Organisational Support 9e	9.976	12	H <sub>o</sub>
Return on Investment 10a	4.788	6	H <sub>o</sub>
Return on Investment 10b	4.789	9	H <sub>o</sub>
Return on Investment 10c	3.317	6	H <sub>o</sub>
Return on Investment 10d	25.941	9	H <sup>1</sup>
Return on Investment 10d (Recode)	15.853	6	H <sup>1</sup>
Career Development 11a	8.036	6	H <sub>o</sub>
Career Development 11b	3.334	6	H <sub>o</sub>
Career Development 11c	8.547	6	H <sub>o</sub>
Career Development 11d	9.048	6	H <sub>o</sub>
Credibility 12a	4.258	6	H <sub>o</sub>
Credibility 12b	7.372	6	H <sub>o</sub>
Credibility 12c	7.098	6	H <sub>o</sub>
Credibility 12d	6.967	6	H <sub>o</sub>
Collective Learning 13a	7.315	6	H <sub>o</sub>
Collective Learning 13b	.378	3	H <sub>o</sub>
Collective Learning 13c	3.549	6	H <sub>o</sub>

Collective Learning 13d	7.246	9	H <sub>o</sub>
Partnership 14a	4.698	6	H <sub>o</sub>
Partnership 14b	17.410	9	H <sup>1</sup>
Partnership 14b (Recode)	13.407	6	H <sup>1</sup>
Partnership 14c	10.169	9	H <sub>o</sub>
Partnership 14d	5.691	9	H <sub>o</sub>
<b>Perceptions</b>			
University Support 16a	9.826	9	H <sub>o</sub>
University Support 16b	2.953	6	H <sub>o</sub>
University Support 16c	7.558	9	H <sub>o</sub>
University Support 16d	3.398	9	H <sub>o</sub>
University Support 16e	11.228	9	H <sub>o</sub>
Organisational Support 17a	27.071	12	H <sup>1</sup>
Organisational Support 17a (Recode)	18.949	6	H <sup>1</sup>
Organisational Support 17b	24.621	12	H <sup>1</sup>
Organisational Support 17b (Recode)	16.367	6	H <sup>1</sup>
Organisational Support 17c	14.272	12	H <sub>o</sub>
Organisational Support 17d	26.860	9	H <sup>1</sup>
Organisational Support 17d (Recode)	22.183	6	H <sup>1</sup>
Organisational Support 17e	13.128	9	H <sub>o</sub>
Return on Investment 18a	11.212	12	H <sub>o</sub>
Return on Investment 18b	7.926	9	H <sub>o</sub>
Return on Investment 18c	3.842	9	H <sub>o</sub>
Return on Investment 18d	9.463	12	H <sub>o</sub>
Career Development 19a	8.363	12	H <sub>o</sub>
Career Development 19b	7.998	12	H <sub>o</sub>
Career Development 19c	7.782	12	H <sub>o</sub>
Career Development 19d	12.109	9	H <sub>o</sub>
Credibility 20a	9.700	12	H <sub>o</sub>
Credibility 20b	11.752	12	H <sub>o</sub>
Credibility 20c	5.633	9	H <sub>o</sub>
Credibility 20d	7.720	6	H <sub>o</sub>
Collective Learning 21a	19.376	9	H <sup>1</sup>

Collective Learning 21a (Recode)	9.376	6	H <sub>o</sub>
Collective Learning 21b	9.919	9	H <sub>o</sub>
Collective Learning 21c	9.935	9	H <sub>o</sub>
Collective Learning 21d	2.364	9	H <sub>o</sub>
Partnership 22a	5.467	9	H <sub>o</sub>
Partnership 22b	3.924	6	H <sub>o</sub>
Partnership 22c	7.093	9	H <sub>o</sub>
Partnership 22d	12.000	9	H <sub>o</sub>

Cross Tabulation - Qualification	Chi Square	df	Hypothesis
<b>Expectations</b>			
University Support 8a	15.199	6	H <sup>1</sup>
University Support 8a (Recode)	10.248		H <sup>1</sup>
University Support 8b	5.007	6	H <sub>o</sub>
University Support 8c	4.142	4	H <sub>o</sub>
University Support 8d	12.494	6	H <sub>o</sub>
University Support 8e	2.551	4	H <sub>o</sub>
Organisational Support 9a	2.959	4	H <sub>o</sub>
Organisational Support 9b	1.968	4	H <sub>o</sub>
Organisational Support 9c	1.715	4	H <sub>o</sub>
Organisational Support 9d	3.314	6	H <sub>o</sub>
Organisational Support 9e	10.902	8	H <sub>o</sub>
Return on Investment 10a	5.130	4	H <sub>o</sub>
Return on Investment 10b	5.400	6	H <sub>o</sub>
Return on Investment 10c	5.728	4	H <sub>o</sub>
Return on Investment 10d	9.408	6	H <sub>o</sub>
Career Development 11a	6.708	4	H <sub>o</sub>
Career Development 11b	4.505	4	H <sub>o</sub>
Career Development 11c	5.728	4	H <sub>o</sub>
Career Development 11d	4.217	4	H <sub>o</sub>
Credibility 12a	5.765	4	H <sub>o</sub>
Credibility 12b	4.575	4	H <sub>o</sub>
Credibility 12c	1.305	4	H <sub>o</sub>

Credibility 12d	1.721	4	H <sub>o</sub>
Collective Learning 13a	3.207	4	H <sub>o</sub>
Collective Learning 13b	2.213	2	H <sub>o</sub>
Collective Learning 13c	2.240	4	H <sub>o</sub>
Collective Learning 13d	2.848	6	H <sub>o</sub>
Partnership 14a	2.414	4	H <sub>o</sub>
Partnership 14b	5.536	6	H <sub>o</sub>
Partnership 14c	6.868	6	H <sub>o</sub>
Partnership 14d	3.584	6	H <sub>o</sub>
<b>Perceptions</b>			
University Support 16a	6.373	6	H <sub>o</sub>
University Support 16b	5.867	4	H <sub>o</sub>
University Support 16c	13.138	6	H <sup>1</sup>
University Support 16c (Recode)	8.853		H <sub>o</sub>
University Support 16d	2.357	6	H <sub>o</sub>
University Support 16e	1.499	6	H <sub>o</sub>
Organisational Support 17a	5.224	8	H <sub>o</sub>
Organisational Support 17b	9.178	8	H <sub>o</sub>
Organisational Support 17c	2.541	8	H <sub>o</sub>
Organisational Support 17d	9.797	6	H <sub>o</sub>
Organisational Support 17e	1.913	6	H <sub>o</sub>
Return on Investment 18a	9.183	8	H <sub>o</sub>
Return on Investment 18b	6.413	6	H <sub>o</sub>
Return on Investment 18c	7.857	6	H <sub>o</sub>
Return on Investment 18d	12.362	8	H <sub>o</sub>
Career Development 19a	2.431	8	H <sub>o</sub>
Career Development 19b	11.389	8	H <sub>o</sub>
Career Development 19c	4.040	8	H <sub>o</sub>
Career Development 19d	4.585	6	H <sub>o</sub>
Credibility 20a	9.569	8	H <sub>o</sub>
Credibility 20b	8.825	8	H <sub>o</sub>
Credibility 20c	8.009	6	H <sub>o</sub>
Credibility 20d	9.719	4	H <sup>1</sup>
Collective Learning 21a	4.921	6	H <sub>o</sub>

Collective Learning 21b	5.861	6	H <sub>o</sub>
Collective Learning 21c	2.439	6	H <sub>o</sub>
Collective Learning 21d	2.215	6	H <sub>o</sub>
Partnership 22a	2.983	6	H <sub>o</sub>
Partnership 22b	3.259	4	H <sub>o</sub>
Partnership 22c	4.220	6	H <sub>o</sub>
Partnership 22d	5.343	6	H <sub>o</sub>

Cross Tabulation – Length of Tenure	Chi Square	df	Hypothesis
<b>Expectations</b>			
University Support 8a	5.964	9	H <sub>o</sub>
University Support 8b	5.390	9	H <sub>o</sub>
University Support 8c	4.626	6	H <sub>o</sub>
University Support 8d	2.892	9	H <sub>o</sub>
University Support 8e	3.990	6	H <sub>o</sub>
Organisational Support 9a	13.631	6	H <sup>1</sup>
Organisational Support 9b	7.468	6	H <sub>o</sub>
Organisational Support 9c	4.139	6	H <sub>o</sub>
Organisational Support 9d	6.265	9	H <sub>o</sub>
Organisational Support 9e	6.184	12	H <sub>o</sub>
Return on Investment 10a	4.273	6	H <sub>o</sub>
Return on Investment 10b	11.875	9	H <sub>o</sub>
Return on Investment 10c	2.098	6	H <sub>o</sub>
Return on Investment 10d	9.105	9	H <sub>o</sub>
Career Development 11a	3.993	6	H <sub>o</sub>
Career Development 11b	5.054	6	H <sub>o</sub>
Career Development 11c	2.541	6	H <sub>o</sub>
Career Development 11d	5.943	6	H <sub>o</sub>
Credibility 12a	4.623	6	H <sub>o</sub>
Credibility 12b	3.292	6	H <sub>o</sub>
Credibility 12c	6.637	6	H <sub>o</sub>
Credibility 12d	3.911	6	H <sub>o</sub>
Collective Learning 13a	8.262	6	H <sub>o</sub>

Collective Learning 13b	3.849	3	H <sub>o</sub>
Collective Learning 13c	7.380	6	H <sub>o</sub>
Collective Learning 13d	7.646	9	H <sub>o</sub>
Partnership 14a	9.635	6	H <sub>o</sub>
Partnership 14b	5.313	9	H <sub>o</sub>
Partnership 14c	2.402	9	H <sub>o</sub>
Partnership 14d	4.870	9	H <sub>o</sub>
<b>Perceptions</b>			
University Support 16a	10.529	9	H <sub>o</sub>
University Support 16b	4.758	6	H <sub>o</sub>
University Support 16c	10.951	9	H <sub>o</sub>
University Support 16d	11.387	9	H <sub>o</sub>
University Support 16e	6.286	9	H <sub>o</sub>
Organisational Support 17a	9.066	12	H <sub>o</sub>
Organisational Support 17b	9.839	12	H <sub>o</sub>
Organisational Support 17c	8.383	12	H <sub>o</sub>
Organisational Support 17d	11.930	9	H <sub>o</sub>
Organisational Support 17e	11.217	9	H <sub>o</sub>
Return on Investment 18a	16.483	12	H <sub>o</sub>
Return on Investment 18b	12.298	9	H <sub>o</sub>
Return on Investment 18c	11.096	9	H <sub>o</sub>
Return on Investment 18d	13.879	12	H <sub>o</sub>
Career Development 19a	10.816	12	H <sub>o</sub>
Career Development 19b	8.831	12	H <sub>o</sub>
Career Development 19c	7.828	12	H <sub>o</sub>
Career Development 19d	6.685	9	H <sub>o</sub>
Credibility 20a	20.426	12	H <sub>o</sub>
Credibility 20b	15.789	12	H <sub>o</sub>
Credibility 20c	7.174	9	H <sub>o</sub>
Credibility 20d	7.394	6	H <sub>o</sub>
Collective Learning 21a	16.006	9	H <sub>o</sub>
Collective Learning 21b	8.289	9	H <sub>o</sub>
Collective Learning 21c	6.043	9	H <sub>o</sub>
Collective Learning 21d	2.804	9	H <sub>o</sub>



Partnership 22a	7.773	9	H <sub>o</sub>
Partnership 22b	6.659	6	H <sub>o</sub>
Partnership 22c	3.972	9	H <sub>o</sub>
Partnership 22d	18.203	9	H <sup>1</sup>
Partnership 22d (Recode)	3.073	9	H <sub>o</sub>

## Appendix 25

### Stage Three - Interview A - L&D Manager Luxury Retail Company - 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why do you think the expectation dimensions and questions in this questionnaire are different to those of other service quality questionnaires?	
Respondent	I think what is interesting about these is that you are almost getting a bigger picture. So it is a much bigger wider picture of the programme as a whole rather than drilling down into 'how is your trainer', and 'how are the facilities' or 'how are your hand-outs'. This is much bigger in terms of how much is the organisation ready for this, how supportive is the university and is this going to support your career, so these questions are much more around the bigger picture as opposed to the small details around the course. On reflection it seems to be a good way of analysing a programme that you are running especially if it is one in which you have a significant investment especially in monetary value as the degree does or investment in time, in terms of how much time it takes for us as an L&D function to run it the time that the students have off their day jobs to do it the time that everyone else invests into making the programme happen, so this is perhaps an interesting way of analysing those things as opposed to 'do I like the course or hand-outs'. These issues are much bigger picture and strategic. This has instantly given me some interesting results to be able to talk to someone and say 'right so if we were to do this again, what would we need to consider what would we need to look at...much more than a standard evaluation of a course.	<p>Q1 Bigger picture</p> <p>Corroboration (survey dimensions)</p> <p>Q1 Investment of time &amp; money</p> <p>Valuable tool Relevance</p>
JS	Q2. Why do you think respondents have ranked certain dimensions so highly?	
Respondent	Well it is interesting that we have got return on investment and career development as the number one things and I wonder whether there are two reasons for those. The return on investment could come potentially from the fact that we are a retailer, we are very focused on the bottom line, we are very focused on results, on scores, on anything we can measure and it is something which is discussed constantly. Nothing happens without an ROI being considered, it's always there. Therefore I am not too surprised that this has got a joint	<p>Q2 Results &amp; bottom line culture = ROI</p>

	<p>ranking of number one. Then the career development piece, it doesn't actually surprise me, if we look at who actually filled in the survey it fits the students themselves. I am glad that this is what it is showing as it shows that they are doing this for a reason. They have not signed up to this two year programme for a bit of a jolly. They are focusing on their career and developing themselves. The other people were L&amp;D or line managers and I am glad that that's there because it means we are all doing this with a natural purpose. This is going to develop the career of the people in our business because they are the people who are driving our business, so I think it is a positive thing that those two things are towards the top. You could almost argue that career development is ROI whereas the other things seem to be about how the programme runs. Does it run with organisational support, does it run with collective learning, does it run with partnership...that is the 'how'. In terms of organisational support three is not a bad score, it is near the top. It doesn't surprise me that it is at the top of the 'how'. So good that it's three and closely behind that university support being four. This echoes the fact that it should be the two organisations working together. Collective learning being the seventh, that's fine. It is almost as if that is the 'how', how did we go about this learning.</p>	<p><b>Corroboration (ROI, CD)</b></p> <p>Q2 Career development demonstrates commitment</p> <p>Organisational support and university support important <b>Corroboration (OS)</b></p>
JS	Q3. Are any expectation areas missing from the questionnaire? If so, which?	
Respondent	Off the top of my head...no. Can we look at the university support....academic staff are included which is good. Nothing obvious is glaring at me.	Q3 (no missing elements). But N.B. see Q10
JS	Q4. Why do you think the expectation scores have come out so high?	
Respondent	<p>I wonder if expectations would be high on any programme because you build it up don't you. So as the organisation, as the L&amp;D function you build it up to encourage people to go on it. So it doesn't surprise me that expectation scores are really, really high. I would imagine that anyone would go onto this kind of programme with high expectations....I am going to go on this programme and it is going to do this for me, I am going to get this from it, you would enter any learning programme with high expectations if it's the sort of programme where you can select yourself or it is a partnership between you and your manager selecting the programme for you. I wonder if those scores would be lower if you were evaluating compulsory learning, so if you were evaluating an induction process I wonder if the expectations would be lower because you are evaluating an induction, you have to go on it, so your expectations are lower. But for this, because it is a programme that someone wants to go on, has seen it heavily advertised and they know the company is spending lots</p>	<p>Q4 High build-up of expectations prior to course <b>Corroboration (high E scores)</b></p> <p>Q4 Participants choose to take the course</p> <p>Q4 Voluntary course</p> <p>Q4 High investment by the company</p>

	of money on it , you think ‘the organisation is spending lots of money on this programme, I really want to go on it so I think it is going to be brilliant.	
JS	Q5. What is your perspective of the overall perception results?	
Respondent	I think on the whole the gaps aren’t too big which I think is quite pleasing. The majority of the gaps are less than one. So the perceptions overall appear to meeting the expectations. So I am pleased with that. I think if we were looking at gaps of two or two point five or above I think I would be really worried that we were not meeting any expectations. In terms of the gaps that are over one I think these are really interesting to see because it echoes what we already have an inkling about. Perceptions overall are quite high and therefore the gaps are quite small	Q5 Perception scores positive overall
JS	Q6. Your overall satisfaction score is x. What might be the reasons for this?	
Respondent	Our overall score at 69% is a little lower than the average score for all organisations. That is a little disappointing. However, it is a bit of a weird one because that score is calculated from a separate question. It’s not pooling all those answers and creating a score and I wonder if you pooled all those answers and created a score would that that score be different to this score which is from a specific question? But because it is a new question I think it is interesting that it’s 69% because I wonder whether it reflects our high expectations and high standards. As a company which constantly talks about being the number one store in the world and our high achievement and high results, achieving fantastic sales results even through a recession and being a luxury retailer where standards are really high, I think we constantly have this view of everything being high standard and amazing and therefore we can sometimes be a little critical, and it sometimes takes someone with an outside view to say ‘no actually you are good at what you do’. So I think this is something to keep an eye on but actually what is more interesting are the individual elements of the report which give us some tangible feedback	Q6 Overall score disappointing Q6 Problem of separate question – is this helpful?  Q6 Highly self-critical as a company  Q6 Individual dimensions more useful than overall satisfaction score
JS	Q7. Why do you think the gap scores for certain dimensions/questions are higher? What factors may have contributed to this?	
Respondent	In terms of career development This is reflecting conversations that we are already having with people around what the actual outcome of the programme is. If we look at the first intake of students, we have the issue of ‘what do I do next’. Maybe this is something either we didn’t articulate clearly enough or the career development expectations were different to what we thought as L&D or the management team. So what this has done is articulate this	Q7 CD Poor communication

	<p>and put it into numbers. We need to talk about this and say that we seriously need to do something about it, otherwise we will end up with a second cohort who will graduate and will be as disillusioned as the first cohort were. That is not to say that there is no career development. I just think the career development is slightly less clear for our programme because it is not a management programme. This is a programme which is developing a skill and therefore the career development off the back of developing a skill is sometimes a bit more hazy than a programme where it is a very linear growth. So if you go on one of our management programmes for example, it is quite explicit. By the end of this you will be a manager. Our degree is not quite so clear. It is not saying by the end of it you will be a manager, it is saying by the end of it you will have a better understanding of selling. It is almost up to you what you do with your career after that. So, I think it is up to us to shape and support that, but what this has done is provide numbers to help us think about what we already knew and have started to get feedback around.</p> <p>In terms of return on investment I think that links heavily into the career development piece because for us the investment is what happens to the people afterwards...what do we get from this, do we get a group of future managers, do we get a group of future amazing sales people, what is it that we are getting as a result of this. So I think the two are heavily linked. It is about what the tangible return is. Are we articulating that return explicitly. Are we saying that by the end of this programme you will increase your sales by 10% or 20% per year, or are we saying that by the end of this you will be a sales manager. That's not what we are setting out to do. So, maybe it is about us clarifying at the beginning what the return is so that you can then quantify the return on investment.</p> <p>In terms of organisational support, the overall scores are good. The gaps are quite small overall which demonstrates that the organisation overall really does support learning, it really does support delegates on programmes. The degree is one of our key programmes at sales person level, it is a highly respected programme. We have so many senior managers and directors who contribute to the programme. Every module has a senior manager sponsoring it and they do this gladly and willingly. It took some time to get some momentum and then when everyone saw how amazing the programme is they were fighting to sponsor a module. The big picture support is there. Where it falls down with the last two questions in the section is around the line manager and the question is 'does the big picture translate further down. This highlights a small gap that I think we have. So, are our managers</p>	<p>Q7 CD Need for improved communication Q7 CD no automatic right of passage</p> <p>Q7 CD Clear definition of programme outcomes required</p> <p>Q7 OS Line manager support weak</p>
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	<p>allowing staff to have time off the shop floor...yes they are. But are they then having a follow-up meeting about their project. That's the bit where we may be potentially falling down. Again we are not talking about a drastic gap. We are talking about a 1.6 or a 1.2, so it is not huge, but it puts some numbers around something we are already talking about in the organisation as to whether managers are quite operational, making sure stocks out, making sure staff are covered etc. so they are happy letting their staff have time off the shop floor because that is an operational matter but are they then doing the support, the coaching, the conversation bit. This is echoing some thoughts we have already had.</p> <p>In terms of university support I think the one that has the biggest gap, not huge but more significant than the others is around helping the students to apply the theory to practice. I think at one level that is always going to be a challenge. It's a different organisation and that lecturer might be a lecturer of psychology not a lecturer of retail. So a little bit of a discrepancy there is to be expected. However, I do think it is something we should be mindful of. It can't be so abstract that we get feedback that 'we don't want to have that lecturer next year because they weren't applying it to our circumstances at all' so I think that this does highlight that there does have to be the commitment from the lecturer to totally get the organisation. They need to make that commitment and that effort. In terms of feedback on student progress that's a more operational thing. Do we just need to build in more if that is generally the perception of people on the programme. They need feedback as they go along. This question is not saying they don't get feedback but they need it more regularly. We might need to explore that more regularly.</p>	<p>Q7 OS Lack of 1:1 meetings</p> <p>Q7 OS Line managers operational</p> <p>Q7 OS Line managers weak on mentoring</p> <p>Q7 US Theory to practice weak</p> <p>Q7 US Lecturer must understand the organisation</p> <p>Q7 US Feedback should be more regular</p>
JS	Q8. What can be done by the university or the organisation to address the areas with high gap scores?	
Respondent	<p>I think the career development is closely linked with the ROI bit because the return is the career development they get out of it – for me the two are intrinsically linked. I think we need to think about as an organisation what we want the outcome to be realistically. We then need to look at whether the programme can give us those outcomes and if the content of the programme is right for that and then once we have agreed that it is, we need to make sure that the programme gives us that. Then we need to make sure that when we are recruiting against it we articulate that clearly. We must then ensure that we maintain that throughout the programme. This should be articulated at the recruitment stage, at the selection stage and continuously throughout so that delegates don't lose sight of why they</p>	<p>Q8 CD Consider the programme outcomes</p> <p>Q8 CD Communication of outcomes at early stage</p>

	<p>are on this programme. I think as a business we need to think ‘what do we want from this programme?’ Let’s re-visit that now.</p> <p>In terms of organisational support, this is not a case of managers not being able to, because I think that they are able. We have got some really good managers across the business and who do know how to work with their team if they are working on a project or on a training programme. We have such a high culture of training programmes, development is so high on the agenda, so it is an everyday thing for us, it is not an anomaly. So it is not that managers can’t do the supporting bit, it is not that they can’t give feedback on assignments, they can do that totally. The problem is maybe they don’t remember to do that, maybe it’s not in the forefront of their minds, maybe they don’t realise that students would really like that from them. So, I think that is a quick win. I think it is about getting out to the managers and sharing this feedback with them and saying ‘look do you realise that your delegate, this person from your team would really like you to be more involved, which hopefully they will see as a good thing. We need to tell them how they can support them. I think this is better done face to face. It’s not about just sending out an e-mail. We do meet with the managers anyway. We have catch-ups but they are not as frequent as they could be. Maybe we could make them more frequent and update them on this issue at one of those and say that this is the feedback we have had. I also think that sometime the direct line manager gets left out because we have such a strong involvement from the senior managers. The senior managers love the programme, they are all over it and therefore sometimes the delegates themselves, if they have a question, they go straight to their senior manager. The senior manager has been involved in helping to set the essay question, therefore they go straight to the senior manager for their query. So, not in a negative way but they are inadvertently skipping their line manager. So maybe it is a two-way thing and we have a responsibility to make sure the line manager is involved.</p> <p>In terms of university support, it is two things. Firstly making sure that the university lecturers understand the organisation. When they come in they should do the floor walk and really get to understand our business. They should do that with any organisation they work with. They should literally do a floor walk with a couple of people, get a sense of the business, get a sense of the challenges, get a sense of the reality of that business and how it ticks, the sort of language they use and the challenges they face and really feel the organisation. Secondly in the sessions they need to make sure there is constant feedback,</p>	<p>Q8 OS Line managers have the competencies</p> <p>Q8 OS Line manager feedback not a priority</p> <p>Q8 OS Communication with line managers</p> <p>Q8 OS Face to face regular meetings with line managers</p> <p>Q8 OS Senior manager involvement good but line manager may be skipped</p> <p>Q8 US Importance of university staff doing floor walk</p> <p>Q8 US Investigate challenges and culture of the</p>
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	<p>constantly relating back to the organisation so when you are thinking about how a customer might think or about the psychological profile of a consumer, there needs to be enough time to say 'how does that relate to your customer' and relate to the person you are serving and constantly making sure that this is in the language. This links to the follow-up feedback which is about theory into practice, looking at models and saying 'yes, you understand that model but how can I help you to do something with it'. In terms of regular feedback for students we need to schedule more time for it because the days that the lecturers are here are quite full already so do we need to build in more support time, even if that is regular phone calls or Skype contacts. It doesn't have to be in person. This should be done for each individual student.</p>	<p>business</p> <p>Q8 US Relate theory to practice</p> <p>Q8 US Schedule more time for tutorials by Skype or phone</p>
JS	Q9. How helpful is this tool in evaluating corporate education?	
Respondent	<p>I think it is really useful. It genuinely raises some interesting points. I cannot imagine any organisation would not want ROI or career development to be evaluated on a programme that they have invested a lot of time and money into. Likewise, the person delivering the programme i.e. the university and the line managers, you would want those evaluated as well. The collective learning, I am not so sure is such a massive priority, hence it is ranked as seven in importance. I would question the collective learning. This is the only question about learning. If you are going to include a question on learning should it be more a general question about learning. Actually, I have just thought....is there anything in the questionnaire on content? Is the content of the course relevant and what I expected it to be...am I learning the things I wanted to learn....there is nothing in there on content. Collective learning seems like such a specialist part of learning. You are not questioning the lecture style or group discussions or did online library work for you, only collective learning...only one aspect of learning. That learning question is bizarrely specific in relation to everything else. There should be a dimension around learning with a, b, c, d, maybe collective learning, individual reading, lectures, library etc. These are all aspects of the delivery. Would they have preferred it if the whole thing was done online? That question isn't asked. And there is nothing about content. The more I think about it, that is a glaring omission. I think if you had a dimension on learning or delivery and a dimension on content you would have a rounded evaluation tool which includes everything and I would definitely use.</p> <p>I think it is interesting doing the questionnaire this way because most feedback or</p>	<p><b>Corroboration (survey tool)</b></p> <p>Q9 A valuable tool</p> <p>Q9 Most dimensions useful</p> <p>Q9 Unsure regarding collective learning</p> <p>(Q3 Course content &amp; delivery missing)</p> <p>(Q3 Wider learning missing)</p> <p><b>Corroboration (survey tool)</b></p>



	<p>evaluation on a programme is only about perceptions. So, on an evaluation form I might answer 'did this course help me with my career?' It doesn't ask me what I expected it to deliver for my career and now what it has delivered for my career and to look at the gap. Most questionnaires only ask you what you are thinking at the time. This asks you what you wanted it to do and then what it is actually doing for you. It is a different way of looking at it. Actually, they might have scored something low but they might have scored it as a low expectation as well so it doesn't matter. So, someone might score collective learning as a three for perception but they might have said their expectation was only a three. Therefore it has met my expectations. But if you look at the perception score by itself without comparing it to anything it looks like a bad score. The gap rather than the actual score is useful.</p>	Q9 Gap between E and P useful
JS	Q10. When should the tool be used in the evaluation process?	
Respondent	<p>I think classically with programmes you always end up doing it at the end and there are obviously arguments as to whether you do it immediately or let it sink in. If you do it immediately the scores may be high, if you leave it too long it's different. I wonder if it depends on the duration of your programme. So our degree is two years, that's really long by anyone's standards. Would there be any harm in doing it halfway through? No, probably not actually. You could then do one at the end and see if those gaps got smaller and we fixed it. So I think it would depend on the programme.</p>	<p>Q10 After programme</p> <p>Q10 Halfway through Q10 Opportunity to fix problems</p>

## Appendix 26

### Interview B – L&D Manager Insurance Company – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why do you think the expectation dimensions and questions in this questionnaire are different to those of other service quality questionnaires?	
Respondent	<p>They do make sense. In terms of why those have come out instead of quality of hand-outs or the classrooms etc., it could be to do with the maturity of the population. Certainly from our organisational perspective I have no doubt that our participants are acutely aware of the investment that was made on their behalf and also as a consequence of the value that they can bring back to the organisation and hence then deliver to our customers, through doing things differently or better. I think they would be aware....well let's face it, these are the bigger issues and I would say that normal customer service quality questionnaires are concerned with the transactional stuff and less about the value, so it is interesting that organisational support comes out as high as it does but clearly that, from the individual's perspective is about the value that is delivered to them as participants. I think the university support is probably the most obvious of those. If that were about supplier support, you would expect to see that in there. The return on investment is standard fare. The career development is part of the bigger picture. Why does an individual want to commit their time to this? It is such an intensive programme in so many respects. Yes, I think that that would be very important. The collective learning for our organisation is not surprising and really it's about the ability to share and break down siloes. It was such a great opportunity and I think that they recognised that fairly quickly so again that would probably be higher on their personal agenda as well as their business agenda. Credibility is something about the longevity and sustainability of the programme and the tenure of the individuals who participated were those that feel part of the organisational family and care about the organisation and hence the credibility of this programme would be important. The partnership piece, we work in partnership with so many suppliers that the mind-set of the</p>	<p><b>Corroboration (survey dimensions)</b>  Q1 Maturity of respondents  Q1 Investment by the organisation    Q1 Bigger picture vs transactional issues    Q1 Value to participants    Q1 Bigger picture    <b>Corroboration (CL)</b>    Credibility is about longevity and sustainability    <b>Corroboration (CR, PN)</b></p>

	individuals has probably driven that. These issues do make sense to me.	
JS	Q2. Why do you think respondents have ranked certain dimensions so highly?	
Respondent	<p>The career development I might have expected to see further up the scale because of the investment the individual is making in this. I think they were doing it a little more for personal gain perhaps which isn't reflected here. That was clearly less important which I find interesting. I am not surprised about the collective learning at all given the organisational environment. We have been a traditionally siloed organisation. There is no opportunity for individuals to interact formally or informally. You tend to work in your own business area and there hasn't been a lot of sharing. We are moving into a different space now, using operational process to drive more of this learning at work, as it were. But for the groups, up until six months ago this is such an important vehicle for that and we know by anecdotal evidence what we have been told by individuals that this concentrated period of time of working together and being social together and the various discussion that prevails around business issues in a safe environment where they don't have line managers challenging them, yes it was a free thinking space I suppose. So, that doesn't surprise me at all. The organisational support is interesting that that came first. I think in some respects this is surprising because of the high pressured environment that these individuals have. I think that it's interesting where we have 9c and 9d where we have the issue of line manager feedback that that didn't take place by participants' line managers, yes, I get that. It is something we are trying to get our managers to focus on. In our normal L&amp;D stuff we suffer from line managers not engaging properly from a briefing and de-briefing perspective and they still don't get it that you put people in a classroom and they just change. There needs to be workplace reinforcement and dialogue and discussion and coaching and support and all those things. The university support is an obvious one because how do you make this thing work if you haven't got that? So, it is pleasing to see that the staff in 8a is one of the smaller gaps. That's good. 8d is a fantastic result given all the work we have done to contextualise the content. The fact that the tutors have been able to see that through I think that this for people who haven't been in a learning environment is important. It is about transferring the rhetoric from theory which is positive. 8e is positive from a university point of view. There was help in transferring the learning.</p>	<p><b>Surprise (CD)</b></p> <p><b>Corroboration (CL)</b> Q2 Silo mentality = need for CL</p> <p><b>Corroboration (OS line manager feedback)</b> Q2 Line manager lack of engagement = need for OS</p> <p>Communication with line managers required</p> <p>Q2 Good on theory to practice</p>
JS	Q3. Are any expectation areas missing from the questionnaire? If so, which?	
Respondent	It's quite a big question. There may be something around this premise that if you are not	<b>Q3 Missing Element</b>

	<p>personally delivering value to the customer or delivering value to someone who is, then there is an issue. We have invested in people who are on the course, the managers have expressed a view on this. But what is the correlation between the investment we have made and how that translates to the issue of adding value to the organisation's offer to the customer. This may come under return on investment. 10a refers to ROI for the organisation but there isn't anything about the organisation's customer. So, as a supplier of a service to customers we have really got to be working in partnership with them as to how we can improve our service to the ultimate customer, so how does something like this drive that value? That might not have been something a year ago that I would have thought about. I think it is a lean-thinking approach which turns everything on its head. If you take a call centre environment, you ask a manager 'do you know what is going on in your environment?' and they will talk to you about call response times etc. but do they really know what is going on in the business, no they don't really, because they don't sit with their people. They don't understand how demand affects the process, so how does this help us move forward? So, that may be an area – the customer piece. In terms of content it is implied in university support. I would like to think that we did lots of upfront work on content when we asked the original cohort what competencies that they believed the organisation's manager needed to focus on. There was quite a lot of work done upfront on how does that align. It's a reasonable point in that here we are now at the end of the process and how did all that wash its way through. But I do think it comes into that 8d in university support. The only other thing going through my head is the continuous improvement piece. How has the learning enabled the individual to make a tangible difference and add value to the processes in the organisation? So, the continuous improvement piece maybe. This could go into the return on investment dimension. There are two perspectives on this. There is the individual and what have they measurably gained and are then able to apply and then there is how have they been able to move that forward in the workplace. And then there is the whole good old innovation piece. An organisation's sustainability is so dependent on their ability to innovate and move with the times and so if you have a group of people who have been through that piece, how do they bring that back into the organisation.</p>	<p>(delivering value to the customer)</p> <p>May be part of ROI</p> <p>Q3 Missing Element (content implied in university support) Much upfront preparation on content</p> <p>Q3 Missing Element (continuous improvement implied in ROI)</p> <p>Q3 Missing Element (innovation)</p>
JS	Q4. Why do you think the expectation scores have come out so high?	
Respondent	I guess a three year MBA programme, nobody is going to embark on that lightly from a personal perspective or from an organisational perspective. So, I could relate to the	Q4 course is internationally prestigious

	<p>expectations being quite high. The MBA and the reputation and the connotations around that is fairly well-known and versed so you would expect expectations to be 80% and above on most things and why wouldn't you be. Aim high and achieve high hopefully. I would also say that the maturity of the individuals is part of the painting. I would then say that the connotations around the MBA and the commitment and investment piece in terms of time, commitment and monetary value, all the dynamics around that, I would say that these results are not that surprising. Three years is a huge investment for the company and the individuals, so I would say that the expectations would be quite high.</p>	<p><b>Corroboration (high E scores)</b></p> <p>Q4 Maturity of the individuals Q4 Investment of time, commitment and money Q4 Investment for individuals and organisation</p>
JS	Q5. What is your perspective of the overall perception results?	
Respondent	<p>I think some of these perception results are disappointing. The career development piece for example. They are disappointing initially but then you think if you look at 11d, the careful selection of participants, I would want to drill down on that because is that a feeling that there has been a wrong level of individual attending or the wrong people were selected – what does that mean from the organisation's point of view. So, that would need further analysis. Broadly there are not many over one, so 20% difference. The return-on-investment scores are interesting because the gap is relatively small and the perceptions are quite high. The same is true of collective learning. Partnership also has quite high perception scores, so overall I would say they are not too bad. I would want to use this next time around to improve the scores certainly and make some changes.</p>	<p><b>Surprise (CD perception scores)</b></p> <p>Q5 Some perception scores disappointing Need to drill down on the results</p> <p>Q5 Overall perception scores not bad</p>
JS	Q6. Your overall satisfaction score is x. What might be the reasons for this?	
Respondent	<p>We get really positive feedback on this as an initiative from the organisation and we have got people waiting to attend and go on it. I am really encouraged by this score actually. I didn't think it would be that high. If it said 84% or 85% I think I would still be pleased So, it is a great result. We must be doing something right. I think it is probably a better score than we have sensed from people's general feedback. There has been some feedback from some people about how do you select people to go on this and whether we have the wrong people on there. There has been some general feeling around that in the organisation and there are whys and wherefores around that but broadly the current thinking is that, yes this is a worthwhile initiative and adds value to the company.</p>	<p>Q6 Overall score very positive</p> <p>Q6 Confirmed from anecdotal feedback</p>
JS	Q7. Why do you think the gap scores for certain dimensions/questions are higher? What	

	factors may have contributed to this?	
Respondent	<p>9c is totally alien to this organisation. We have to react as an insurance business to catastrophes and to pressures. We run lean. We don't have that much capacity. So, the line managers ability to release people for this kind of thing was always going to be an issue for us and a risk arguably. Initiating regular one to one reviews to monitor progress being a high gap doesn't surprise me at all. There's a rake of reasons for this. Hopefully we are moving in the right direction. Do we have the right people who are line managers? Do they themselves really understand what these individuals are going through? Do they feel able to talk to the individuals about the content of the intervention and meaningfully add in a dialogue, recognising that people do need to transfer the learning to the workplace. That's all about monitoring progress. That's quite alien to them. We do suffer from that with our general learning programmes, briefing and de-briefing them and so forth. 9e feedback on assignments, again do the managers feel they have the wherewithal? Do they understand what the individuals are going through in the first place? Should we have done more to brief line managers and given them The support to do this? It's a perpetual wheel isn't it and yes, we could ask ourselves questions about it. It is interesting the senior manager piece where the gaps are less arguably but again I think we are seeing a changing landscape with our senior staff members. Not all of them are as entrenched. We have had a lot of new people joining us from other organisations where mentoring is almost a run-of-the-mill piece so I think we are seeing a change in our more senior managers which hopefully helps the cause. But when this survey was done this is an issue that was only gathering momentum. In terms of 8c feedback from the university of student progress, if a student needs feedback I would hope they would have the maturity to ask for the help they need, whether because they weren't getting it from their managers or they felt they should get more from the university I don't know. I thought there was a reasonable job done in terms of looking at draft assignments and that kind of thing. Maybe there was inconsistency around that, maybe some tutors did that more than others. That could be a reason. So the expectations may have been a bit all over the place. Maybe because the teaching was done on a three day block basis the students may have felt that there wasn't a lot of interaction with tutors outside of the block. Tutorials might have helped. If there was a distance learning component, students could have an online chat. Maybe there weren't the mechanisms in place to allow that to happen efficiently. These people all work very long hours and maybe it</p>	<p>Q7 OS Line managers support weak Q7 OS Lean workforce</p> <p>Q7 OS Line manager competencies Q7 OS Line manager empathy</p> <p>Q7 OS Common to other learning programmes</p> <p>Q7 OS Communication</p> <p>Q7 OS Improving context within organisation</p> <p>Q7 US Students should ask for more feedback</p> <p>Q7 US Inconsistency of feedback</p> <p>Q7 US Block teaching problem</p>

	<p>just wasn't physically possible. I think that's an interesting one and one which we would look to you to improve. In terms of the organisation maybe I should have done more to drive that. So, maybe that does require some attention – that's an interesting one.</p> <p>In terms of career development the course should enhance students' careers but you can have your rose-tinted glasses on, can't you. You can think 'I am on this course and I'll pass it and something is going to happen at the end. I think we could have done more to manage expectations at that point and I think with the change in my role actually I know that this area of talent management a succession has slipped. I got involved in a broader remit and nobody backfilled me purely from an L&amp;D point of view, so I would say that we are accountable for some of that, not necessarily in terms of managing but in terms of handling people's expectations. In terms of the course should create a new talent pool within the organisation that is disappointing that they didn't think it did. In terms of succession planning that's interesting because I would say in the Global Technical Services space within our business it has and that is real high end, high margin area of our business which requires a lot of focus. So, that score is disappointing. In terms of promotions for people who have done the course this was looking pretty good but since then we have had a new CEO and there has been a clean out, to be blunt and there have been some casualties. Having said that we have several of the participants who are still in very prominent roles and have moved forward within the organisation. I am really interested in 11d, careful selection of participants because that is one of the highest gaps. I would really like to drill down on this. Were there any free-form comments on the questionnaire that might inform this? It would be interesting to look at them. To start with we put people on the programme who were from the emerging leaders group but the selection for that was initially rather arbitrary. We did then move to put a selection process in place but I don't think we were as joined up as we could have been in terms of succession. So I think it is valid but I am surprised it is so marked and I would really like to understand more about that.</p> <p>In terms of credibility I am surprised by the high score because we did win an award and everyone was aware of that. It was well publicised. That award was fairly early on. Maybe it is about the sustainability of that. Maybe it relates to communication in the business which is consistently, if you look at the employer engagement survey, something that we really do need to focus on, because we haven't got it right. We haven't made the investment in that area as adequately as we should and I think that is internal and external. I think it probably</p>	<p>Q7 US Virtual component would be useful</p> <p>Q7 CD Rose tinted glasses</p> <p>Q7 CD Talent management and succession planning has slipped</p> <p><b>Surprise</b> (CD talent pool &amp; succession planning)</p> <p><b>Surprise</b> (CD selection)</p> <p><b>Surprise</b> (CR within organisation and external) Q7 CR Communication weak</p>
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	around the way we have promoted it.	
JS	Q8. What can be done by the university or the organisation to address the areas with high gap scores?	
Respondent	<p>Where do we start! The communications around organisational support need to be improved. Line managers need to be clear about what the purpose of the course is, what the objectives of the modules are, timelines...you can argue that chasing up is wasteful but I think we need to encourage that element of it. Communication involves the whole spectrum. We would have to look at what would be most appropriate for the organisation at the time and we would want to consider that fairly seriously. But it should include everything from the initial briefing right the way through to how we follow up after with tutorials and assignments etc. We need to find some measure of sharing at the appropriate level of detail the sorts of subject matter that the individuals are engaging with, because if you engage with this it needs to be a two way process. The managers need a better briefing on that.</p> <p>In terms of 8c university support and regular feedback. I would want to understand that better and get more feedback from the students on what their suggestions should be so I would canvass a view from those people who have already been through it in order that we could work better. But again it centres around communication.</p> <p>In terms of career development, I think the whole succession planning process is patchy in places although in our business we have got better at it. We need to ensure we manage expectations better. Ok you apply for this course, work your way through it and are successful but it doesn't mean you have a right of passage to x, y, z. You are in the high potential group and if opportunities arise you will be considered but there is not an automatic right of passage. Again it's communication. I think there is probably a misconception that the MBA is a panacea. But there is a rake of other things that are really important.</p> <p>In terms of credibility I would wish to understand more about that but I sense that is about our ability to promote this externally and promote what we have done and to sell the benefits of what we have done and how it adds value to our clients. This can be done through our tenders, aligning more closely with the promotion that our sales people use. Also market publications. We could do more around promotional articles and updates. Internally we need to make more of these people and use them well which links with career development.</p>	<p>Q8 OS Communication with line managers</p> <p>Q8 OS Initial briefing and follow-up meetings with line managers</p> <p>Q8 US Communication with university</p> <p>Q8 CD Improved succession planning</p> <p>Q8 CD Improved communication on CD expectations</p> <p>Q8 CD No automatic right of passage.</p> <p>Q8 CR Communication and promotion</p> <p>Q8 CR Tenders</p> <p>Q8 CR Market publications</p> <p>Q8 CR Internal publicity</p>



	<p>In terms of what the university can do, if you think of the university as a supplier, has the university ever asked our organisation, ok we do module evaluation sheets, but some of the questions around what has gone well and what could be done differently and where has the value been added, has there been any return. There hasn't been anything at a corporate level. As a supplier of a service...I know our suppliers are often asking us about that and we do with them. I think a good honest conversation is best and maybe the person from our organisation would need to go and canvass opinion and would need help and support in doing that. It's not always helpful when I get pulled out and there are external influences but maybe there is something around that. A meeting could take place annually. There may be value in doing it after every two modules even. I confess that year one we were more closely on it and we were talking more frequently and we have relaxed this a bit. I think in the context of this research this would be useful.</p>	<p>Q8 US Ongoing reviews between university and organisation</p> <p>Q8 US Better communication in past but this has slipped</p>
JS	Q9. How helpful is this tool in evaluating corporate education?	
Respondent	<p>Immediately when thinking about this for evaluation I am up in the fours, thinking about the same rating scale, so I would say very valuable. It's about who has completed it, it's about what free-form responses do you get to substantiate the questions. Seeing it here I think it is a good benchmark exercise. I think if this is what has mattered to the respondents of the survey, especially as senior managers also responded, since all stakeholders provided responses to these measures then that's absolutely valuable. So, yes we should pay attention to the results and we should act on them. So, I would say an excess of four on the weighted average scale. In terms of expectations and perceptions we have a provider who provides technical training who measures the segments of the content and asks people to evaluate where they are one to five before the event and then after the event and then after they have been in the workplace for six weeks and I think that kind of before and after evaluation is useful. I am really interested in this tool and it does put a fresh perspective around the interminable issue of ROI. It doesn't help with tangible financial benefits but it is another way of looking at it. The only other thing I would say is that looking at the gap scores and the overall satisfaction scores there doesn't seem to be a complete correlation there. I am not sure that this is easy to understand without drilling down. How can you be so satisfied overall when you have such big gaps on some dimensions. Of course it is good news but it is intriguing.</p>	<p><b>Corroboration (survey tool)</b> Q9 A valuable tool</p> <p>Q9 The dimensions are important issues for stakeholders</p> <p>Q9 A fresh perspective on evaluation</p> <p>Q9 Mismatch between overall satisfaction score and the detailed scores</p>
JS	Q10. When should the tool be used in the evaluation process?	

Respondent	<p>You could argue that you have had a decent sample size to get the dimensions sorted and you could run it before and log it and then do it again at the end. But I would do it at the end of year one part way through the whole course because the recency piece comes into play i.e. peoples' ability to record accurately how they were feeling at the time. I think it is quite valuable to capture that. You could even do it after two modules maybe. The benefit would be that you can take some action to make the changes. In terms of how we can determine these ratings and I don't know how the free-form questions worked but giving people the chance to comment is always good.</p>	<p>Q10 Before and after programme Q10 Recency important</p> <p>Q10 Halfway through or regularly Q10 Opportunity to fix problems</p>
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## Appendix 27

### Interview C – L&D Manager NHS Hospital – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why do you think the expectation dimensions and questions in this questionnaire are different to those of other service quality questionnaires?	
Respondent	<p>Yes, that's a good question. The first thing is that if we are looking at academic qualifications then corporately these are exactly the kind of things you would be looking for. I think that is absolutely right. I think within the health sector though we are looking more and more towards service improvement, the delivery of key performance indicators and very much focused on quality which may or may not leave education behind, depending largely where the individuals themselves are coming from. It's very interesting that if you look at the NHS at the present everyone talks about McKinsey, Price Waterhouse Cooper, you name it, it's not a university, I am not sure that people are thinking the same way. The educationalists amongst the importance of education. Things have moved. Hospitals are looking to companies rather than universities to provide them with the supporting information. What is interesting though is that a lot of the stuff that comes from those companies is underpinned by this, so it is not universities we are working with directly but indirectly we are. All the theory is still there. To my mind, those that have gone through a university programme of the leadership ilk, cope better with the organisational change that is required, they all use the good old-fashioned gut instinct and experience, but those who haven't had it don't have anything to ground their experience on, so that's quite interesting. I think the other thing is that academia tends to work to a slightly longer timescale than service improvement, because it doesn't have to be delivered tomorrow. That's another tension for us because regulators are coming back in three months and saying 'we want a change'. With the best will in the world you can't inculcate everyone with training that is going to do that. It needs other drivers of the type 'we are going to do this'. Monitor and CQC say 'here's the template, deliver against those'. They are saying 'we don't want to see</p>	<p><b>Corroboration (survey dimensions)</b></p> <p><b>Q1 Changing business environment</b></p> <p>Emphasis in health sector on quality and service improvement</p> <p>Move towards companies as provider</p> <p>University programmes still useful</p> <p>University programmes work to a longer timescale</p>

	<p>fifteen more managers with a Masters qualification, although conversely the expectation is that you have that. That is very interesting and has been a dilemma for some years in the NHS. For years an academic qualification didn't count unless you were a clinical professional, whereas now, with charters coming in for managerial behaviours, the requirement for second degrees has become more apparent. But it's not necessarily in the way careers are structured.</p> <p>In terms of these dimensions I think these are the things we would expect. We need organisational support, we need university support and then the cost of that, so yes, return on investment. We would be looking at that, not only in terms of cost but also knowledge, what is coming back into the organisation, if you like, to drive some of the service delivery that we have now. Since we worked with you the organisation has changed and when we worked with you we had no idea where we were going. Actually some of the stuff that we covered in corporate education is now being used and the assumption is that one would have to use that knowledge. We are now working with consultants like Price Waterhouse Coopers or McKinsey but they are expecting staff who they are working with to have that underpinning corporate knowledge, so I think the return on investment that we get links into that. Career development, yes, the course should be seen as career development, however, within the NHS I think that has potentially a lower focus than it would in a bank or a consultancy company. Just because you have a certain amount of corporate education doesn't mean you are going to get on or increase your career. I don't think people within the organisation would say it is going to increase my career, within this organisation. You may use that qualification in your next promotion somewhere else, but there is nothing that will take you further internally. I don't think that would be true of all organisations but here it is true. If you think about the police, they have to have a higher qualification before they can even think about applying for a senior post. We don't have anything comparable to that.</p>	<p>Regulators want instant results</p> <p>University qualification still useful</p> <p><b>Corroboration</b> (OS, US, ROI)</p> <p>Q1 Changing business organisation</p> <p>Career development useful dimension</p> <p>No automatic right of passage for enhanced career</p>
JS	Q2. Why do you think respondents have ranked certain dimensions so highly?	
Respondent	<p>It does make sense to me, because if we are providing them with corporate education then the organisation need to support that, they will want return on investment, so I can see why people would want organisational support and get something back. In terms of university support, they are the experts, so to speak so they would be driving it. Certainly in terms of career development we would see that as the big driver and collective learning it is about us learning about models and theories and about you learning about us as an organisation and</p>	<p><b>Corroboration</b> (OS, ROI, US, CD, CL)</p>

	can we marry the two together. So I can see why that would rank quite highly. But certainly I can see why organisational support and return on investment they ranked them as that. In terms of organisational support people see that as direct hands-on help and within the Health Service that is often something that doesn't happen because the organisation will support someone by paying the course fees and then forget them and they expect them to come back with a bag of tricks. So in the organisation's mind it is about finance and in the learners mind it is about the support they will get. The peer support is also important as it helps them to bond together. University support is about right because for a lot of our people doing higher degrees this might be their first go, so they would want to know that they are not being set up to fail, so that is ok and partnership is interesting at seven. It is probably high on the person commissioning's agenda but not on the students agenda	Q2 Organisation focus on finance rather than individual support = need for OS
JS	Q3. Are any expectation areas missing from the questionnaire? If so, which?	
Respondent	There is nothing that leaps out at me as missing, no	Q3 (no missing elements)
JS	Q4. Why do you think the expectation scores have come out so high?	
Respondent	In the first instance, expectations are subjective and I think by the nature of committing to this type of programme whether you are the commissioner or the person undertaking the programme you want to believe it has a certain worth and that everything will be in place to make it a success. If you doubt that in any way then you start to think 'this isn't for me'. So there is huge goodwill in there to want to succeed and probably the harsh reality of getting down to doing something that will make the partnership work or whatever it is will become more problematic because you are caught up in the day to day and that will start to colour where people are at. When you are faced with something you are scoring your expectation would be high. It's a bit like buying something...your expectation is quite high. When you are scoring something you aren't going to score your expectation in the lower half of it, so I am not surprised they are high. I am not surprised from our organisation that as it is all ranked so high, I would expect a high ranking for organisational support. If the organisation is putting learners through some development that they would get support because they are being invested in and therefore the return on investment would also be high. I am also not surprised that the academic support is high. Where I am more surprised is the level of expectation around career development and the collective learning in terms of where it is ranked in order of importance. So if their expectations of career development are really high this is a mismatch with the ranking. That is quite interesting. Again on credibility in terms of	<p>Q4 Strong belief in worth of course</p> <p>Q4 Huge goodwill to succeed followed by reality</p> <p><b>Corroboration</b> (high E scores)</p> <p>Q4 High investment increases need for organisational support</p> <p><b>Surprise</b> (CD, CL)</p>

	<p>how the programme is seen within the organisation I can see why that would be seen as having high expectations but they have ranked that quite low. I would expect lower scores on some of those further down. Perhaps that is part of us talking things up. We had to do a lot of talking to get our Masters programme through Execs and we had to sell it to those who were perhaps a little reticent in the first place, as to whether they could do it. This was a big step up, a big ask. Some programmes are seen as more within your capability. This programme was one that was a bit more out on the edge for some folk. I think when you get into that realm they probably start thinking there is more in it in all sorts of ways. Interestingly some people ask 'are we going to start another one' because people are still looking to do a Masters, so people still want it, so it goes back to what are the expectations of the organisation around what staff should have in terms of qualifications and learning. But if you are asking the organisation to invest a lot of money for two years, where is the return on investment in that, when that person, for all sorts of reasons may not even be here going forward. It's this environment that we are in where we are trying to espouse lifelong learning. But the reality is that the organisation has six months to shape up. Mental health organisations have a long term perspective on things but we are short term, get a fix to a service problem orientated.</p>	<p>Q4 High expectations due to talking things up</p> <p>Q4 High profile of the course</p>
JS	Q5. What is your perspective of the overall perception results?	
Respondent	<p>I think the organisational support one....I can understand that because the majority of the learners felt there was no organisational support. In terms of career development I think we have answered that already. The expectation is that the programme should support it but I think the answers here are correct in that in this organisation in the NHS having corporate education will not necessarily advance your career. It should do, I can see why it should but in reality it doesn't which is probably why we have got that ranking of six at the end. In terms of organisational support it doesn't surprise me that line managers don't come out of this with glowing colours because line managers are under increasing pressure. They may well think they are losing a member of staff for a period of time, so how are you going to cover that. They may be being asked to do something they are not comfortable with, maybe mentoring. We may not support them to support the staff. We don't follow the whole thing through and then of course there is the possibility that they are pushing forward and coming up with ideas that actually their line manager thinks 'Oh dear – get back in your box!' without giving them the opportunity to flower, because they may feel they can't do what the person</p>	<p><b>Corroboration (P scores)</b></p> <p>(Q7 No automatic right of passage to enhanced career)</p> <p>(Q7 Line managers are under pressure)</p> <p>Q7 Line managers may not have competencies to mentor)</p> <p>(Q7 Line managers not able</p>

	is suggesting.	to act on participants suggestions)
JS	Q6. Your overall satisfaction score is x. What might be the reasons for this?	
Respondent	I think from an individual learner's perspective, for many of them it was their first chance to do something highly academic. They hadn't been in university for a while and the actual achievement that in the end they received and maybe that has resulted in the high score rather than everything else above it. Those would be my first thoughts on that. What they have achieved and how they have used it has contributed to that. Many of these people didn't have a first degree and made it to the graduation. There's a real high spot in there. There are the accolades from family, friends and of course the organisation. The sense of well-being is extremely high. Anyone who went through the programme would justifiably feel proud that they had mastered it. So, I am not surprised at that. When you start to think about it and all the individual elements. When you fill out questionnaires and have a separate question the answer you give doesn't always match up with what you thought beforehand.	Q6 First opportunity to do academic degree  Q6 Academic success creates a sense of pride  Q6 Problem of separate question – is this helpful?
JS	Q7. Why do you think the gap scores for certain dimensions/questions are higher? What factors may have contributed to this?	
Respondent	I have got two thoughts on the organisational support issue really. The first is that when the development was being undertaken, the organisation itself was in movement from one place to another place and some of the line managers and some organisational support was focused elsewhere because of what was going on in the organisation. Therefore when the learners were going for support in terms of mentorship, the people identified were otherwise engaged. That was the first reason. It was due to the timing and context of the organisation. I think that was a contributory factor. The other thought I have is that when we have learners, and this is true with other courses, they struggle with a very similar issue that managers don't support. Managers can sometimes feel threatened and feel that may come up short if they can't provide the type of support that is needed. I think that can sometimes happen especially when the manager doesn't have the same qualification and doesn't have the same opportunity and therefore might feel less confident in being able to provide the answers. They may not want the challenge. Rather than actually sitting down and saying 'I haven't done this myself, but tell me your views on this, what do you need from me and how can we work on this together. That isn't built into the working day to have that kind of	Q7 OS Difficult organisational context distraction  Q7 OS Common to other learning programmes Q7 OS Line managers threatened Q7 OS Line manager competency to provide answers



	<p>discussion in this organisation.</p> <p>In terms of career development I think that within the NHS we have a pay system that is supposedly predicated upon certain qualifications. But people within the NHS can sometimes move into a post without that qualification based on their experiential learning. Also, as an organisation we tend to look more at clinical and technical skills rather than academic learning. As you progress up the career path within this organisation the importance of a qualification gets more limited as go up the career ladder. Having a qualification doesn't actually mean you can do the job. Having a qualification doesn't always come first in terms of employing somebody. That's my experience here. It is interesting actually that if you look at the organisational stats most promotions are internal which doesn't match the perception that we have that that may be true in the clinical and technical areas. The perception is that if you are going into management or higher leadership that a qualification will come from outside. So, once you get into the senior bands, the career development will come from out there rather than in here.</p> <p>The expectation would be that there would be a return on investment in terms of those who have answered the questionnaire. But knowing the programme as I do there were a lot of individuals who undertook projects that were not used by the organisation. Some individuals would have identified savings and resource savings where return on investment would have been high. But, when the programme finished here, some of the learning which had taken place was not replicated within the organisation in terms of the theories and models used. Since that time we have seen much change in the organisation and I think that now you would see more return on investment if the course was repeated. The organisation should have looked at whether the projects would have created return on investment that resulted in cost savings or whether there was return on investment within the individual.</p> <p>In terms of credibility, I am not sure as an organisation how much credibility we put on academic qualifications. Much of the workforce is an ageing workforce and probably came through a clinical rather than an academic route and therefore some of them wouldn't want to admit that they themselves didn't have a qualification that their staff are now gaining and therefore they wouldn't want to think 'I haven't got a qualification and I am a line manager'. I wonder if that played a part</p>	<p>Q7 CD Promotion often based on clinical not academic skills</p> <p>Q7 CD Academic qualification doesn't mean you can do the job</p> <p>Q7 CD Senior jobs often filled by external candidates</p> <p>Q7 ROI Projects not taken up by the organisation</p> <p>Q7 ROI Lack of replication within the organisation</p> <p>Q7 CR Emphasis on clinical skills rather than academic qualification</p> <p>Q7 OS Line managers threatened</p>
JS	Q8. What can be done by the university or the organisation to address the areas with high gap scores?	



Respondent	<p>I think that from where the organisation was then to where it is currently it has moved to more exec buy-in to corporate education and training in general. Now there would be more potential for organisational support for those undertaking a programme. I think the course would be tied in more to what the organisation required than previously happened. I think they would measure it more. We have moved into the realms of 'what is the outcome, how are you going to measure it'. We have got to see that change. So I think gaining greater buy-in is most important. The context of that is in terms of where the NHS is going generally, constraints around finance, which play a part in this. As an organisation we must spend more time analysing what is going on because we make assumptions at the moment. We need to think about how much resource we need to tailoring the course to everyone. Our whole appraisal process leaves something to be desired as well. We need to be absolutely more certain about what we want at the end of the day, about how we get good leaders and how we nurture them. It's difficult to know how we stop people from burning out. These are all very important questions for us. We may well have to start thinking much harder about this. The other thing is that as an organisation we have moved forward. We have different systems and structures in place and we are being encouraged to write strategies which have to be aligned, We have a PMO office from which all the projects come out in terms of strategic change. Aligning a corporate education programme to those areas would support greater buy-in. If it aligned to a strategy, then everyone will have a stake in it and will want to make sure it happens. It is about the senior managers' credibility not just the learners. That would be where I would see the need for a change. It would certainly make it easier for us in training and development. We often feel like car salesmen flogging something but you have strategies to deliver and commissioners scrutinising everything that you are doing. So we need to be able to say we are going to put 25 people through this programme and 'by the way divisions you will support them'. We need to be much more prescriptive. In terms of what the university can do to improve organisational support it is partly about the course offering. We worked hard to tailor the programme to the hospital and the more the university can do that, the more the organisation will feel comfortable that it is a worthwhile investment. If you know that the course takes two years and it involves this much work it helps to work through what is involved. If you look at a lot of university offerings it is 'here is the menu and off you go'. But value is in a partnership. The value is in each organisation feeling special and different so there is a chance to build some</p>	<p>Q8 OS More support would be provided now</p> <p>Q8 OS Greater focus on outcomes now</p> <p>Q8 OS Greater staff buy-in required</p> <p>Q8 OS Better appraisal and clarity of outcomes required</p> <p>Q8 OS Greater alignment to outcomes required</p> <p>Q8 US Course offering is important</p>
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	<p>confidence, And you are in a very big marketplace. People go where they know, where they are recommended to, maybe their boss went on. In terms of line managers we need to go to them and explain what is involved. We need to have the supporters in the room and set out the expectations of the course and the expectations of them personally. That would give the supporters themselves a point of contact with the university and with the commissioners within the organisation so they felt supported. This would be better done face to face. It would help them to have questions to ask and to provide clarity with both the university and the commissioner within the organisation there. This would be more beneficial, rather than a word report which they won't read. Face time is important and you could even set this up virtually. In terms of career development we need a more robust talent development programme within the organisation than we have currently, including succession planning. We don't succession plan for people moving up within the organisation. We don't look back, we don't look forward. We react, we are not pro-active. We need to improve that succession planning process and how we identify talent. That will then link into career progression for individuals. You could identify very early on the individual's abilities and limitations from the very beginning. In terms of university input it would be good to have more senior academics who publish papers and write books as well as doing their lecturing to be working alongside the organisation on a particular issue. Beyond the MA we could have said 'by the way there is all this stuff going on and all this resource can be tapped into'. This partnership is has another aspect to it which may well help the qualification bit. This would also be more helpful to you because it would rely solely on the student bit. Maybe that's an area to explore. In terms of return on investment it goes back to the issue of organisational support. If the organisational support is increased I think return on investment would go up. It is important to align the learner with what is going on in the organisation that gets return on investment. Not just learning for the course but developing strategic planning. What we originally started with was some projects that would benefit the organisation. With the lack of organisational support that didn't work out very well. Going forward we need to know where the organisation is in terms of strategic planning and which projects are going through the transformational agenda and aligning those would see greater return on investment. We need to build that internal consultancy that you call on for the next round of strategic planning. That's where you would get your return on investment. It would be very interesting with our senior leaders' programme it would be helpful to call on the support of</p>	<p>Q8 OS Communication with line managers</p> <p>Q8 OS Face to face meetings</p> <p>Q8 OS Virtual meetings</p> <p>Q8 CD Improved talent management &amp; succession plan required</p> <p>Q8 US Involvement of senior academics who publish papers</p> <p>Q8 US Wider partnership with university rather than just a qualification</p> <p>Q8 OS Alignment of projects to organisational objectives</p> <p>Q8 OS Involvement of previous participants as future mentors</p>
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	those who have already gone through the programme as support and bring them in and help them to meet university staff and tell them what the issues are. If we had had the opportunity to build some of that in it would be useful.	
JS	Q9. How helpful is this tool in evaluating corporate education?	
Respondent	From my perspective I think it has been quite helpful. I think it is how we use it going forward that is the key. I think having the expectations up-front is not something that both people commissioning the training have focused on. When you ask them to measure expectations they can't. They don't know what they want, they just want training to be undertaken, So having a tool, something like this, from my perspective as someone who commissions training, I would find this useful as a starting point. It is quite interesting to see what has come out of your study. Thinking of where we might be going in terms of customer care training or some other form of training, having this as a tool to be used would be invaluable. Our sample size was relatively small but if you put two or three hundred people through training and you are starting to get something quite valuable. It would be interesting to follow a cohort through a year and revisit and see how things change.	<p><b>Corroboration (survey tool)</b>  Q9 Gap between E and P useful</p> <p>Q9 A valuable tool  Q9 Bigger sample size would be helpful</p>
JS	Q10. When should the tool be used in the evaluation process?	
Respondent	It is always logical to go towards the end. At times there is value trying to do something halfway through, maybe after six months or one year on. That is when it starts to get really interesting. We have got to start thinking about how we start to measure all sorts of things and this is a good step towards being able to do that. It's good to do it at the end but it would be interesting to do a version halfway through so that if you did have large gaps they could be addressed and improved. You could make some changes and course adjustments. That's when you would pick up some return on investment stuff and see the correlation between the four different periods. When people fill out a questionnaire it is subjective in terms of what they are thinking at the time. Probably some of the questionnaire would have to be adapted according to the specific programme but overall it is a very interesting approach.	<p>Q10 After programme  Q10 Halfway through</p> <p>Q10 Opportunity to fix problems</p> <p>Q10 Adaptation to specific programmes</p>

## Appendix 28

### Interview D – L&D Manager Builders Merchants – 2<sup>nd</sup> Cycle Coding

	Interview Text	Coding
JS	Q1. Why do you think the expectation dimensions and questions in this questionnaire are different to those of other service quality questionnaires?	
Respondent	I certainly would have expected organisational support, university support, return on investment, career development. The first four I would expect to see as a part of any major training initiative. Collective learning not so much as that is not something that we would normally focus on. Credibility is not something that we would normally focus on. That's an interesting category. Partnership, yes, it is important that whoever we work with and is providing a service for us, that we work in partnership.	<b>Corroboration (OS, US, ROI, CD)</b>
JS	Q2. Why do you think respondents have ranked certain dimensions so highly?	
Respondent	It's interesting that organisational support has come out as ranked top. I would have expected return on investment to come out top because that is one of the things that I am targeted on continually. With any training programme within the company, the company wants to see the return on investment. If I say I want to spend X amount of money on this piece of development for the staff or for this member of staff, then the first question I am asked is 'what's the return on investment?' So what is going to be the value to the company? So I am surprised by this that it is ranked fifth. If the respondent group is students as well as senior people in the organisation then as a student I am going to be very interested in how my organisation is going to support me. I am not going to be so focused on the cost and benefit of it. Career development coming quite low is interesting.	<b>Surprise (ROI)</b>  Q2 Students expectation of senior managers = need for OS
JS	Q3. Are any expectation areas missing from the questionnaire? If so, which?	
Respondent	Most areas are covered like resources, venue and support. Content of the course is quite important. I can't see this in the actual questions. That is something we would look at after a training intervention. Was it pitched at the right level – too high, too low, delivery, but you have that in university support. So perhaps questions around the content itself and its value	<b>Q 3 Missing Element (content)</b>

	to the individual. Collective learning is an interesting point but it is not something that we would normally measure but I do feel it is useful, absolutely. We would probably informally talk to the students about it afterwards. One of the expectations would be that they share best practice, best experience. That's one of the reasons that we put them together in a group. Yes, an important measure but not something that we would normally include. An interesting one.	<b>Corroboration (CL)</b>
JS	Q4. Why do you think the expectation scores have come out so high?	
Respondent	<p>No, this doesn't surprise me. If I am thinking about expectations I would expect them to be high. I think that's only natural. The investment of time and money are significant factors. It's coming back to return on investment. Naturally expectations are going to be high for a programme of this nature, because it was very different to anything we have done before. We had never been involved with a university before. We had never developed a programme like this before. We had never provided this high a level of qualification before. And the fact that we opened it up to all members of staff makes me see why the expectations are quite high in terms of what we were trying to get out of it. We spent a lot of time developing and working with the university on getting this programme right and therefore the expectations were quite high.</p> <p>I think that there was an unrealistic expectation on their workload. We found that even though we told people at the beginning that it is at least fifteen hours study in your own time, I don't think they really believed that and I think they struggled, which is why when we had fifteen staff complete the foundation degree and we offered all of them to go on to do the third year, only four went forward. The rest of them said, 'no, it is too much work' so I think there was a mismatch there between their expectations and what was actually required. So, there were some unrealistic expectations at the beginning. Also unrealistic expectations of organisational support as well. Although we tried to support the students I think there was a lack of understanding from some of them about line managers.</p>	<p><b>Corroboration (high E scores)</b>  Q4 Investment of time and money  Q4 New course for the organisation  Q4 High level of the qualification    Q4 Time &amp; effort in preparation</p> <p>Mismatch of expectations and reality</p> <p>Unrealistic expectations</p>
JS	Q5. What is your perspective of the overall perception results?	
Respondent	I can see why the areas with the biggest gaps are the biggest gaps particularly in terms of students and their comments. In terms of the actual perception scores from an employer's point of view probably some of those scores are a little disappointing and perhaps we could have done better especially with regard to line managers. I don't think we did enough as a	<p><b>Surprise (P scores)</b>  Q5 some P scores disappointing</p>

	company to explain to line managers or to the students who were on the programme, what the programme was about. The senior manager scores are disappointing because they should be higher. Senior staff should assist students. That's quite a disappointing score because I think we tried to do that. Senior staff provided support to students – again I felt we did that. They had open access to all our directors. Some took advantage of that, some didn't. But the line manager stuff I can fully understand.	(Q7 Poor communication with line managers)  <b>Surprise</b> (OS senior managers)
JS	Q6. Your overall satisfaction score is x. What might be the reasons for this?	
Respondent	If that's a reflection of the programme then that is disappointing. It is quite low. I think one of the issues is around line manager support. I think there is an issue around university support. For us as a company, the issue of return on investment is probably difficult to gauge. What we haven't seen is a direct return on investment but career development was good. The partnership aspect could have been better. 56% is probably a little disappointing.	<b>Surprise</b> (overall satisfaction score) Q6 Overall satisfaction score disappointing
JS	Q7. Why do you think the gap scores for certain dimensions/questions are higher? What factors may have contributed to this?	
Respondent	In terms of organisational support, I am not surprised by the scores for line managers. I think what was happening was that the students who were actually on the programme would have expected time to study, they may well have expected to have discussed it with their line manager and I don't think that happened or very rarely and that is partly our fault as a company. We probably focused too much on the senior management aspect of it in trying to support the students and yet day to day their line managers didn't understand enough about the programme or the requirements of the course. I think that's our fault. The surprising results for me are the senior management ones. I think we tried there so they are a surprise and I don't know why. We would probably have to find out from some students as to why. They would have expected access to senior managers and ongoing support with regular contact with some of the senior staff, rather than us just saying 'if you need access to any of the directors you can have it'. Maybe they thought that we would put something regular into the programme where you would have access, I don't know. In terms of university support, providing regular feedback on student progress, that doesn't surprise me. From an organisation point of view I don't think there was enough feedback on how our students were progressing. We found that we had issues with a couple of students who were struggling and that wasn't communicated to us. We found that we had to go back to the university and ask how these people were getting on. We felt we wished you had told	<b>Corroboration</b> (OS line managers)  Q7 OS Line manager support weak Q7 OS Too great a focus on senior managers Q7 OS Line manager lack of understanding of programme  Q7 OS Need for more regular contact with senior managers  <b>Corroboration</b> (US feedback on progress) Q7 US Lack of feedback from university to



	<p>us because we could have done something about that. The scores for their various assignments we didn't get to see those. In the beginning it was better within the first year, we met regularly with the university but that certainly tailed off and there wasn't enough communication to us as an organisation and I know some of the students felt that way, that they didn't get enough feedback on their assignments. Sometimes when they asked for help, then it was a long time before someone would get back to them. That doesn't surprise me. In terms of contextualising the material to the organisation and theory into practice, that's absolutely right. The people who were teaching them were academic in nature and probably some of our guys knew more about wider business or certainly this business than some of the academics who were teaching them. Is that a realistic expectation that you are going to have a lecturer from a university who is an expert in every industry, of course not, but for the students that is what they would have expected.</p> <p>In terms of career development, I don't know why that is so low. Of the fifteen that started the course eleven of them are in new jobs and promoted, so I am surprised at that. Creating a new talent pool, yes, the course did do that. Also I don't know why succession planning has come out so low because we have an issue in this organisation with succession planning at branch manager level and yet a couple of guys on this course are now branch managers. The succession planning in the organisation isn't as good as it could be. It is something we are working on now and we are hoping to get a succession plan created. So it is not as good as it could be but certainly these guys who went on this course were highlighted to become senior managers in terms of opportunities that were coming up and they have taken advantage of those opportunities and part of it is down to what they learned from the course and the confidence that they gained from the course. They performed much better at interview. We didn't create jobs for them but where jobs came up we found that they performed much better at interview and they got the position. So that area around career development is quite surprising.</p> <p>It is interesting that the issue of credibility is the only response in the whole research study where perception was higher than expectation. I honestly think that this is because we have not done this before. In the history of the company we have previously only educated one or two people to this level but a programme like this, an academic higher level qualification, we have never done before and I think that that's probably why. What we found is that from the students' point of view many of the people that we had put on the programme had never</p>	<p>organisation</p> <p>Q7 US Better feedback at the start then tailed off Q7 US Lack of feedback Q7 US Poor response times <b>Corroboration</b> (US theory into practice) Q7 US Lack of university staff knowledge of the organisation</p> <p><b>Surprise</b> (CD)</p> <p>Q7 CD Succession planning not strong</p> <p>Q7 CR First programme of this kind means academic success important</p>
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	<p>had the opportunity in their working life to do a qualification. The fact that they did that and passed it with the various grades that they got, I think that made them feel really good. As a company we had never supported this kind of programme before. To be able to say that we now have fifteen people in the organisation who have been educated to this level was great. Other organisations might be used to higher level qualifications and it wouldn't be such an issue for them but for us it was, it was a big thing and we were the first in the industry to do this. We have been followed since then, a couple of our competitors have done it. Our professional body has now brought out a foundation degree. The course has been a success for our credibility both within the organisation and within the industry.</p>	<p>Q7 CR Strong feel-good factor</p> <p>Q7 CR Competitors have copied the programme</p>
JS	Q8. What can be done by the university or the organisation to address the areas with high gap scores?	
Respondent	<p>I think communication is a big one. We could have communicated better internally as to why we were doing this and the sort of things the students would be doing and certainly with their line management as to how it would affect the students day to day jobs. We could have done more about communication and what we could have done is said to the line managers 'this is what we expect from you to support those students'. We could have talked about this in our internal newsletter and talked directly to the students' line managers. We could have called a meeting with them and told them this is what we are doing, these are the expectations blah, blah, blah. In hindsight that would have been a good thing to do. We didn't but we could have set out more our expectations with the university to say that this is what we expect from you guys. We did try to do that in some way but then we had this problem with the university talking about it was confidential between them and the students. We then turned round and said 'this may be but we are spending money on this so we need to know whether the students are doing what they are supposed to be doing' so there was a bit of a mismatch there. Perhaps we didn't explore that enough before we kicked off the programme. We did a lot of work with the university in developing the course, in how we would select the students. We just didn't think that this would be an issue. A verbal chat about this would have helped because we didn't address it at all and then, as a result of a verbal chat, if we needed to, we could have put it in writing. Certainly a discussion as to exactly what the university would actually provide us with in terms of progress with the students would have been good. We didn't really bottom that out as we should have done before the programme started.</p>	<p>Q8 OS Communication with line managers</p> <p>Q8 OS Newsletter Q8 OS Face to face meeting</p> <p>Q8 US Communication with university to set expectations</p> <p>Q8 US Communication with university followed by guidance document</p>



	<p>In terms of career development, for the students themselves I don't know what we could have done. For the organisation what we could have done is publicise the success of the programme more. We put nineteen people on the first group. We ran a second group but only four people came forward and I think that the negative aspects of the programme were widely talked about within the company like 'it is tough and it's hard work, you are going to spend a lot of weekends researching and writing reports etc.'. Those sorts of comments were floating around the organisation which put a lot of people off. What we didn't publicise enough is yes, but as a result of that look at where these guys have got to. So again it is about communication. Also, in terms of the university, before the programme starts, they could mention that this is what you need to do for your students. The university should set out what their expectations might look like in a guidance document. That might have been useful. We might then have picked up on the line manager issue which we didn't. In terms of career development the university could provide examples of people who have been through this process before and the ways that their careers have progressed. Perhaps case studies but mainly this issue is going to be in the hands of the organisation.</p>	<p>Q8 CD Greater publicity</p> <p>Q8 CD Internal negative publicity</p> <p>Q8 US Communication important</p> <p>Q8 US University should provide guidance document</p> <p>Q8 US Case studies of career progression</p>
JS	Q9. How helpful is this tool in evaluating corporate education?	
Respondent	<p>I think it is very useful, I do, because there are some measures in there which we wouldn't have thought of. The stuff around collective learning, I think that's very good, the stuff around credibility itself. They are measures we might have used but we don't do it in the way of expectations and perceptions, the before and after as it were. So if we were to repeat this programme there is some very useful information in there that might help us to do things differently. What we tend to do a lot of is we tend to evaluate the 'after' but we don't really tend to ask about expectations before they start out so useful stuff, interesting!</p>	<p><b>Corroboration (survey tool)</b></p> <p>Q9 A valuable tool</p> <p>Q9 Includes measures not normally used by the organisation</p> <p>Q9 Gap between E and P useful</p>
JS	Q10. When should the tool be used in the evaluation process?	
Respondent	<p>Well, I think it is a before and after tool, Before the start of the course almost and then certainly at the end. I also wonder if it would be useful to use it halfway through to see how we are progressing. This would help us to change things, For instance, if we received this sort of information halfway through the course, we could have done something about it, so hopefully by the time you do the questionnaire again at the end, we could have changed things. After the first year we could have found out where we are and then we could make some changes. Certainly if we were carrying on with the programme we would use that to make some definite changes</p>	<p>Q10 Before and after programme</p> <p>Q10 Halfway through</p> <p>Q10 Opportunity to fix problems</p>

