

# **Learning Together: The Role of the Online Community in Army Professional Education**

**A Monograph  
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## **ABSTRACT**

**LEARNING TOGETHER: THE ROLE OF THE ONLINE COMMUNITY IN ARMY PROFESSIONAL EDUCATION** by Major Thomas E. Woodie, U.S. Army, 51 pages.

This monograph explores the online community and its new relationship to the Army educational system. Over the past six to seven years, online communities such as CompanyCommand.army.mil have established themselves as means of communication for the profession. These communities are now integrated into the structures of educational institutions such as West Point and the Command and General Staff College at Fort Leavenworth. While they have thrived thus far, their integration may mean a greater reliance on their capabilities. This monograph briefly examines the ability of the online community to educate professionals.

The methodology used is a review of adult learning models, comparison with self-directed learning models, and examination of recent research in communities of practice. The comparison is brief and highlights a potential for more detailed research as the online community matures.

The conclusions identify the usefulness of the Professional Forum to enhance the learning of soldiers in the conduct of their duties. The Army should resource the Professional Forum to enhance the learning opportunities and maximize the impact. Additionally, the Army should connect the Professional Forum to the foundational schools, enabling a much better discourse between the school and the field.

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## INTRODUCTION

### **The Need to Change**

The United States Army faces a challenge unlike any in the previous twenty years. The tasks demanded of its soldiers have created an environment that has left its education system unable to keep pace. While the schools are rapidly attempting to change to meet the new demands, the environment continues to change the schools will never match the needed rate of change. The learning environment has shifted away from the institutional Army and created the demand for continuous leader development and education.

The Army's school system not only educates soldiers but also writes doctrine and provides instructors as fillers to units in the theaters. Even without the added demands of the operational support, education and doctrine writing would be a demanding task. It is time for the rest of the profession to step in and educate each other. The soldiers must learn together, faster than the enemy. The soldiers have a responsibility to their profession and each other.

### **The Contemporary Environment.**

Military professionals face significantly different problems than those faced in the early nineties. Desert Storm was a much different operation compared to current operations. Soldiers operate in a much more joint and interagency environment than the 1980's and 1990's. This environment has created challenges that many of the officers have had to learn new and different skills to cope and succeed.

The wide variety of tasks demanded of units reflects the challenges of the new environment. Units originally trained for specific battlefield tasks have found their specific skills marginalized in Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF). Coupled with the high operational tempo for rotation into two high demand theaters, marginalized battlefield tasks caused units to retrain for tasks different from their traditional battlefield role.

While these units adapt and overcome the challenge, the “learning curve” is steep and unforgiving.

The professionals that are facing this environment had little time to prepare for the situations they faced. Some have enjoyed the opportunity for the professional schools linked with their current rank and duty level. Additionally, most units undergo a rigorous training period prior to the deployment into theater. Often, units conduct the train-up without extensive knowledge of the true operational environment or the environment changes by the time the deployment occurs.

The professional preparation of soldiers in the military schools focuses on the duties of their grade and rank. These schools work hard to understand and prepare for the challenges that the soldier faces. However, despite the best efforts of the schools, they have not fully achieved the desired standard. Until this year, CGSC did not have a standard for its officer graduates of ILE. If we look closely, we might find other schools and centers also lack a clear understanding of what they are to produce. The Army designs curriculum carefully to meet the needs of the students and base it on doctrine that changes slowly. As a result, school content changes much slower than the operational environment.

The opportunity for education has also decreased. The demands on the personnel system has left little time for professional education. The Army has eliminated and combined courses such as the Combined Arms Services Staff School. While there is value in ensuring the soldier stays with the unit, the soldier needs the education that will provide them a base of knowledge to solve problems.

The Army places great value on the experience of performing a specific duty or conducting a specific task. The profession gives little credence to the person who has never done a task. There is a valid reason for this professional predisposition. The Army must work diligently to ensure that all have the appropriate knowledge available at the right time. The stakes for the profession are high and measured in lives and mission accomplishment.



The profession needs to learn more quickly from the people who have done these new and challenging tasks. The school system is working hard to meet the needs of the students after they leave the confines of the school. However, it is unreasonable to expect the schools to modify curriculum nearly instantaneously and repeatedly to keep up with a rapidly changing environment.

One solution is the professional forum. This online community uses an internet collaboration site to share knowledge. The profession must ask if the professional forum is useful to the Army to facilitate individual learning and knowledge sharing. The Army is attempting to use these forums to facilitate learning. If they are not useful and incapable of facilitating learning, then the Army should look to other means during this period of rapid change.

Is the professional forum a solution to the problems the soldiers face in the current environment? This research will approach the answer to this question through a review of the literature regarding adult learning, experiential learning, and communities of practice. The learning models will help develop a view of how learning occurs for the soldier. The community of practice is the accepted name for the civilian counterpart of the professional forum. Communities of Practice are in use throughout the workplace in widely ranging businesses.

The goal of this monograph is to study the professional forum concept and, if valid, provide recommendations for implementation. The literature linking the community of practice to learning models is limited. The scope of this monograph will be limited due to length and time restrictions. This author attempted to find literature that identified serious shortcomings for the professional forum concept. This author found little that provided an alternate perspective. Further research might find literature that identifies shortcomings as the idea matures.

## **Learning Through Experience.**

As stated above, the Army profession places great value upon the experiences of its members. The Army expects soldiers who have skills developed through conducting specific

operations or assignment to special units to have valuable knowledge. Soldiers gain experience from assignments and deployments that make them in demand by units about to conduct similar operations. FM 22-100 states:

Army schools teach you basic job skills, but they are only part of the learning picture. You'll learn even more on the job. Good leaders add to their knowledge and skills every day. True leaders seek out opportunities; they're always looking for ways to increase their professional knowledge and skills. Dedicated squad leaders jump at the chance to fill in as acting platoon sergeant, not because they've mastered the platoon sergeant's job but because they know the best place to learn about it is in the thick of the action.<sup>1</sup>

Providing the developmental experiences is often difficult to accomplish. The experiences provide the learning environment to create actionable knowledge in the soldiers. In the case of current operations, units may not gain access to the soldiers who have the relevant experiences. Units communicate laterally to transfer knowledge regarding operations and specifics, but are limited by time and space. It is very difficult to place an organization conducting preparatory training in meaningful contact with units who are currently conducting operations. While the Army works to achieve this goal, it is not working as well as it needs.

Some of the products provided by the Center for Army Lessons Learned include the trends at the Joint Readiness Training Center (JRTC). Selecting the command and control battlefield operating system section, the trends analysis from JRTC is not encouraging. The publication identifies eighty two areas as trends that need emphasis. This compares to nine that have a positive performance rating from JRTC. Some of these trends are striking due to the subject matter. The analysts cite convoy operations four times in the needs emphasis category, despite the deluge of information on the CALL website and other venues.<sup>2</sup> Many of the trends indicate a lack of standard operating procedures and tracking methods. These are both items that are easily transferred from one unit to another electronically.

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<sup>1</sup> U.S. Department of the Army, FM 22-100, *Leadership* (Washington, DC: Government Printing Office, 1999), 1-27.

<sup>2</sup> U.S. Department of the Army, Center for Army Lessons Learned, *JRTC Trends* (Washington, DC: Government Printing Office, October 2003 to March 2004), 3.

Why are units and professionals struggling with the tasks that emphasized by the leadership and in training? Another quote from the JRTC Trends provides an interesting insight:

While leaders know the basics of the COE, they do not yet understand how characteristics such as information operations, urban areas, civilians on the battlefield, and media complicate the battle space in such a manner soldiers will often move between war-fighting and stability operations and support operations. Units fail to act first by not planning for these characteristics and rehearsing contingencies bases upon contact with these elements. As a result, missions become foiled because soldiers are unprepared to handle these ambiguous and dynamic conditions.<sup>3</sup>

Understanding the environment would seem to be one of the most fundamental requirements for the soldier. Without an appreciation of the nature of the battlefield environment, it is unlikely that the soldier can be successful without significant effort. Why haven't we developed a shared understanding of the critical conditions in the COE? Why does the current system not work to achieve higher levels of performance earlier?

The Army clearly understands the need to prepare soldiers for the demands of combat and designed the school system to prepare them. However, there is a gap between the focus of the schools and the ever changing needs of the soldier. Action must be taken to ensure that the schools remain focused on the critical components they teach and the soldiers gain the knowledge necessary to fight and win on a very fluid battlefield.

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<sup>3</sup> Ibid., 85.

## CHAPTER TWO

# LEARNING THEORY

### Adult Learning Models

The Army considers life-long learning an important value for any professional. The development of individuals that learn throughout their careers is important for individual and unit success. Learning and teaching are fundamental components of any training plan and indirectly highlighted by training doctrine. The training doctrine and methods the Army employs are meant to maximize the learning of critical skills.

Malcolm Knowles described adult education as “a set of organized activities carried on by a wide variety of institutions for the accomplishment of specific educational objectives.”<sup>4</sup> He established criteria for successful adult learning. Adult learning occurs best in the following conditions:

1. When the adult takes responsibility for determining what he or she learns;
2. When the learning is personally beneficial to the adult;
3. When the adult personally discovers; and
4. When the adult receives feedback on their experience.<sup>5</sup>

Army Regulation (AR) 350-1 provides guidance for the education and training of soldiers. AR 350-1 provides the Army’s methodology for educating and developing soldiers during their career to ensure they have the skills that enable them to succeed. The three pillars of this model are individual education and training, operational assignments, and self-development training.<sup>6</sup> Emphasis is placed on duties integrated with training in units. These experiences provide opportunities that allow the development of skills necessary for success.

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<sup>4</sup> Malcolm S. Knowles, *The Modern Practice of Adult Education, from Pedagogy to Androgogy* (Englewood Cliffs, New Jersey: Prentice Hall, 1980), 25.

<sup>5</sup> Mike Prevou and Jozenia Colorado, *Simulations in Education: Creating an Experiential Learning Environment* (Lawrence, KS: University of Kansas, 2004), 3.

<sup>6</sup> U.S. Department of the Army, Army Regulation 350-1, *Army Training and Education* (Washington, DC: Government Printing Office, 2003), 2.

The experiential focus is not exclusively used. Schooling provides much of the basic instruction in doctrine and skills. The majority of the instruction is part of the entry into specific periods of their careers. For instance, prior to leading a fire team or squad the soldier attends Primary Leader Development Course (PLDC) or the Basic Non-Commissioned Officer's Course (BNCOC). These courses prepare the soldier to enter into the leadership roles that they will perform during that particular portion of their career. This concept is termed progressive and sequential, highlighting the need for continued learning.<sup>7</sup>

For the officer, the same is true. Branch specific officer basic courses provide the fundamental knowledge and skills necessary to begin their duties as platoon leaders and company grade officers. Prior to commanding a company, the officer attends the Career Captain's Course for their branch. Again, this course teaches the basics of the duties required to command of a company.

In addition to the formal educational opportunities, the officer and NCO learn a great deal in the experiences that they have while performing their duties they prepared for in school. In many cases, individuals state that their experiences were more important than the time they spent in the schools. This is worth noting, but difficult to quantify. In many cases, without the schools, the individual might have been incapable of performing the basic skills that allowed them to succeed and understand their experience.

## Experiences

Experience is a cornerstone of many of the learning models that are in use today. One definition of learning clearly shows this linkage. David Kolb defines learning as “the process whereby knowledge is created through the transformation of experience.”<sup>8</sup> The two components

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<sup>7</sup> U.S. Department of the Army, Army Regulation 350-58, *Leader Development for America's Army* (Washington, DC: Government Printing Office, 1994), 3.

<sup>8</sup> David A. Kolb, *Experiential Learning: Experience as the Source of Learning and Development* (Englewood Cliffs, New Jersey: Prentice Hall, 1984), 38.

necessary are experience and transformation. The Army provides experiences in the form of the operational assignments.

Each individual has many experiences during the performance of their duties. In the military these experiences are often powerful and clouded by the many different situations and circumstances in which they occur. Counseling focuses on assisting the soldier to create knowledge from the experiences. The Junior Officer Developmental Support Form is an example of one of the counseling forms intended to assist in transformation.<sup>9</sup>

Transformation of knowledge occurs when the individual takes an experience that they have grasped through a concrete experience or conceptualization and applied it in active experimentation or reflection.<sup>10</sup> Experiences are important for the initial development of the concept and the transformation into knowledge. Kolb provides a model that demonstrates that the experience is fundamental for learning.

Malcolm Knowles also argues that experience plays a critical role in the learning. He believes that adults define themselves by their experiences.<sup>11</sup> This is evident in the Army as well. Each of the badges, ribbons, and patches that are on their uniforms highlights their experiences. Key experiences such as combat, deployment, and specific duties displayed on uniforms, records, and evaluations. With the Army focus on experience, Knowles provides some valuable implications that are useful for the practice of education and learning through experience.

If adults define themselves by their experiences, then the institution should adapt itself to maximize learning from these experiences. First, the institution should emphasize the experiential techniques available. Some of the highlighted techniques are simulations, role-

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<sup>9</sup> U.S. Department of the Army, Army Regulation 623-105, *Officer Evaluation Reporting System* (Washington, DC: Government Printing Office, 2004), 21.

<sup>10</sup> Kolb, 38.

<sup>11</sup> *Ibid.*, 50.

playing, and projects.<sup>12</sup> This relates well to the current dynamics of the Army's training models and the use of these to enable learning for the individual in the success of the unit.

Second, Knowles states that institutions should place emphasis on practical application.<sup>13</sup> The institution should make every effort to ensure that instruction is applicable to the situation the learner will experience. Additionally, the student should be challenged to think about how they are going to apply these new concepts and prepare for this utilization.

Finally, the institution should prepare the individual to "unfreeze" and learn from experience. This is a critical step and would seem to be difficult to achieve in the online community. Unfreezing is where the learner is prepared to change their beliefs about the current way they do things. It is the preparation of the learner to "look at themselves more objectively and free their minds from preconceptions."<sup>14</sup>

Knowles' implications are important for the Army Profession to understand. As guidelines for the development of learning experiences, the soldier can apply them in any training or learning environment to ensure maximum effectiveness. The Army has applied these models to improve the effectiveness of the learning experiences.

In attempts to ensure effective learning, the Army has emphasized practical application in education and training. Practical exercises and simulations are two examples of the emphasis. These highlight an experiential emphasis that aids the learner in translating the learning experience to practical application.

## Experiential Learning

One model frequently discussed is experiential learning.<sup>15</sup> Kolb develops this model through analysis of older models. One of the first is the Lewinian model of action research and

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<sup>12</sup> Ibid., 50.

<sup>13</sup> Ibid.

<sup>14</sup> Ibid.

<sup>15</sup> Ibid., 20.

lab training.<sup>16</sup> This model is used to develop laboratory methods and training. The model of lab training is one that is fundamentally experiential due to the inherent nature of lab work. The Lewinian model has four components that Kolb uses to develop the concept and idea of experiential learning. They are:

1. Concrete experiences.<sup>17</sup>
2. Observations and reflections.<sup>18</sup>
3. Formation of abstract concepts and generalizations.<sup>19</sup>
4. Testing implications of concepts in new situations.<sup>20</sup>

The concrete experience is prominent in most Army educational activities. These are experiences that provide the student a framework to understand the educational opportunity that they are about to encounter. They initiate the educational experience, providing motivation and context that might be otherwise missed.

Observations and reflections are a significant part of the experiences in many Army schools in the form of the After Action Review (AAR) during training. The AAR provides a great opportunity for learner to reflect and make observations about the experience.

Kolb develops several characteristics of adult learning. Kolb discusses his model of experiential learning and bases on the models of Piaget and others.<sup>21</sup> Kolb provides six characteristics of experiential learning that provide a useful look at the validity of the adult learning methods. These characteristics are:

1. Learning is best conceived as a process, not outcomes.<sup>22</sup>
2. Learning is a continuous process grounded in experience.<sup>23</sup>

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<sup>16</sup> Ibid., 21.

<sup>17</sup> Ibid., 29.

<sup>18</sup> Ibid., 30.

<sup>19</sup> Ibid., 21.

<sup>20</sup> Ibid., 22.

<sup>21</sup> Ibid., 23.

<sup>22</sup> Ibid., 26.

<sup>23</sup> Ibid., 27.



3. The process of learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world.<sup>24</sup>

4. Learning is a holistic process of adaptation to the world.<sup>25</sup>

5. Learning involves transactions between the person and the environment.<sup>26</sup>

6. Learning is the process of creating knowledge.<sup>27</sup>

The first characteristic is useful in understanding Kolb's concept. Kolb indicates that we should not view the experiential learning in terms of an outcome.<sup>28</sup> This will not sit well with most professionals due to the real need to measure and understand what and how much learning is occurring. This is further complicated by the idea that this process is continuous and grounded in experience.

Next, Kolb argues that the process of learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world. He argues that all learning occurs in a state of tension between opposing methods of learning and understanding.<sup>29</sup> In this case, the modes of adaptation are the concrete and abstract. This argument indicates that it is unlikely that anyone will learn without experiences to allow reconciliation of the abstract.

The next two points are useful to evaluate the capability of any educational method to fulfill a role in the Army Education system. Kolb states that learning is a holistic process of adaptation and that it involves transactions between the person and the environment. The individual must make a connection with the environment and the event that they are attempting to learn about. Without this connection and adaptation, learning is unlikely.

Finally, experiential learning is the process of creating knowledge. Knowledge is created through the active experimentation of the individual. The process of adaptation facilitates the

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<sup>24</sup> Ibid., 29.

<sup>25</sup> Ibid., 31.

<sup>26</sup> Ibid., 34.

<sup>27</sup> Ibid., 36.

<sup>28</sup> Ibid., 38.

<sup>29</sup> Ibid., 29

creation of knowledge in the individual. Kolb defines learning as the process whereby knowledge is created through the transformation of experience.<sup>30</sup>

## Andragogy and Pedagogy

The Army has typically conducted the majority of its professional education in the form of resident instruction. The soldier physically attends school and receives instruction from trained instructors. This model has been useful to teach the difficult concepts and tasks the soldier must perform. Most would conclude that it is important to have face to face instruction with a qualified instructor for tasks that are dangerous for the soldier or units.

The Army uses non-resident and correspondence instruction in some cases, but is generally viewed as less desirable. This is especially true of the previous application of the non-resident course of the Command and General Staff Officer's Course. This is a natural tension that is felt beyond the Army. The adult education community refers to this as tension between pedagogy and andragogy.

Pedagogy is the education model that finds its roots in the education of children.<sup>31</sup> In this model, the teacher has the larger responsibility in the teacher-student relationship. The student is dependent and it requires the teacher to direct the student's learning. This model is best suited to cope with the teaching of simple skills.<sup>32</sup>

Malcolm Knowles describes the development of andragogy as a set of assumptions about the teacher and student.<sup>33</sup> These assumptions create a much different situation than the original pedagogy model. First, the student has more control and responsibility in learning. Second, the teacher focuses on assisting the student in learning. Finally, because the student is in control of the situation and the learning topic, the motivation for learning is greater than would be in a pedagogical setting.

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<sup>30</sup> Ibid., 38.

<sup>31</sup> Knowles, 41.

<sup>32</sup> Ibid.

<sup>33</sup> Ibid., 43.

The Army employs both models of education. Andragogical components exist throughout the Army, with an emphasis placed on the student's responsibility. Schools for development and preparation for the various levels of responsibility require the majority of the time spent away from operational assignments. However, since the student seems to learn a great deal from the experiences that he or she has during their duties, effort spent to maximize preparation and learning from these experiences would be beneficial.

## Transformative Learning

Jack Mezirow provides a model of learning that seems to have some direct application in the current dynamic environment found by the military. In his book, *Transformative Dimensions of Adult Learning*, Dr. Mezirow looks at how learning occurs in the modern world and how it must change. He contends that the modern world has weakened the traditional authority structures and changed the needs and requirements on adult learners.<sup>34</sup> His theory seems to bring some validity by the shift of many schools and professions to online and distance learning. He further argues that the culturally prescribed values and belief systems are unable to provide a means for modern adults to contend with the range of problems they face.<sup>35</sup>

This is consistent with the general feelings of the professional officer and NCO. Complaints of doctrine failing to meet the needs of the soldier would seem to validate Mezirow's observations about the current situation that faces the adult learner. Transformative learning is a means of contending with these issues in a constructive manner.

Mezirow argues that learning involves five interacting contexts:

1. Meaning Perspective;<sup>36</sup>
2. The Communication Process,<sup>37</sup>

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<sup>34</sup> Jack Mezirow, *Transformative Dimensions of Adult Learning* (San Francisco, California: Jossey-Bass, 1991), 2.

<sup>35</sup> *Ibid.*, xiv.

<sup>36</sup> *Ibid.*, 4.

<sup>37</sup> *Ibid.*, 14.

3. A Line of Action;<sup>38</sup>
4. A Self-concept;<sup>39</sup> and
5. The External Situation.<sup>40</sup>

These contexts are critically important to how the learner accomplishes learning in the situation they exist. They provide a view of just how varied each learner's learning experience could be. Mezirow defines learning as "the process of using prior interpretation to construe a new or a revised interpretation of the meaning of one's experience in order to guide future action."<sup>41</sup> This provides an argument for a means to teach and educate professionals in the conduct of their duties and their ability to cope with new situations.

Mezirow's meaning perspective refers to the "frame of reference" of the learning event. Each learning event is tied to a specific experience. The experience itself impacts the learning due to the personal context of the individual in the experience. This context impacts the learner's view of the experience and may change the outcome due to the surrounding conditions.

The communication process refers to the methods of communication. In the case of the Army, the education system has provided a common language for the members of the profession to use. This allows a level of communication that might otherwise be impossible without a common lexicon. This does impact the learning due to the need for shared understanding and communication. Without a common understanding of key concepts, the learner might miss key ideas in the shared communication.

The line of action is the context of the desire of the individual in the learning experience. The individual will change the outcomes based on the desire to learn and achieve outcomes in the learning event. This is an important context as it relates to the motivation of the individual. In

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<sup>38</sup> Ibid.

<sup>39</sup> Ibid.

<sup>40</sup> Ibid., 15.

<sup>41</sup> Ibid., 2.

the case of the Army, crisis often drives the line of action and places it in a context that will impact the learning.

The self image of the learner is another context that is of interest to the Army. The soldier's self image will impact the outcome of the learning experience. Without the soldier believing that they can achieve success and learn, it is unlikely the outcome will be positive. If the soldier's self image is not positive, then steps must be taken to ensure extra effort is made to achieve a positive learning outcome.

How the soldier remembers the learning event is the final context. The external situation includes the stresses, outside influences, and other activities that will change the way individuals remember the event. Learning will change based on the external situation. For example, a situation that is extremely stressful may cloud the perceptions of the individual remembering the learning event. Without clarification, the individual may remember incorrectly or learn the wrong lessons.

Mezirow's contexts are important to understanding how learning occurs in any situation. These five contexts are not static and interact with each other to create a situation that will aid or inhibit the learning process for each individual. Because of this, these contexts deserve some explanation and exploration. With these, we can look at the potential pitfalls of learning methods.

The frame of reference is the first context that Mezirow provides for consideration. This refers to the perspective of the meaning in which the learning is embedded. The individual understands and views the learning through their individual perspective. Communication, the second context further complicates the learning.

The conditions of communication also provide some difficulties. Fortunately, professional soldiers share a relatively similar mastery of the professional language. However, many who seek some specific knowledge may not have attained the same level of mastery that the others who feel comfortable in sharing their knowledge. This could result in some

disconnects in the knowledge sharing in a limited time and space. Developing the means of communication is important for the professional.

The third context is the line of action, or the actual means of the learning situation. This relates to the purpose of the learning and the desire of the learner. Since many of these situations are crises, the learner is motivated to learn and apply their new knowledge. This closely relates to the fourth, and as Mezirow argues often overlooked, context, self-image.<sup>42</sup> The learner's self-image does impact how the learner views and applies the knowledge that they have acquired. The line of action is important and must enhance the confidence of the soldier both personally and with the other soldiers. The final context is the encountered situation.

The situation will vary, either on the design of the learning event or the experience of the individual. The situation creates a potentially unique or similar context for the individual. Units rotating into similar environments could share similar encountered situation contexts, understanding that the environment changes quickly. It provides a basis for comparison.

These insights seem also relevant to another model provided by Karhu in *Expertise Cycle, an Advance Method for Sharing Expertise*. Karhu provides a model that attempts to provide businesses with a means of sharing expertise among employees. This model starts with documentation of methods and then the distribution of these as information.<sup>43</sup> The other employees read the information and develop a higher level of explicit knowledge from these documents. In these situations the use of a "knowledge steward" is sometimes necessary to document and construct the knowledge through interviews.<sup>44</sup>

Additionally, the knowledge is shared among individuals and additional new methods are developed based on the application of the newly gained knowledge. One of the components highlighted by Karhu is the requirement for trust among the people who are sharing the

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<sup>42</sup> Ibid., 15.

<sup>43</sup> Katja Karhu, "Expertise Cycle- An Advanced Method for Sharing Expertise," *Journal of Intellectual Capital* 3, no. 4 (2002): 432.

<sup>44</sup> Ibid.

knowledge.<sup>45</sup> This enables the successful transfer of the knowledge between the individuals and among the group as a whole.

### **Self-Directed Learning.**

Clardy provides a typology to categorize the different types of self-directed learning and some of the key considerations for the organization that is using self directed learning. His model uses the characteristics of focus, time frame, importance of organizational conditions, importance of individual initiative, and type of triggering event to differentiate between three types of self-directed learning projects.<sup>46</sup> These types are focused on vocational self-directed learning, but seem to have potential usefulness in the exploration of self-directed learning.

The first type is induced. In this type of self-directed learning, the organization directs the individual to engage in self directed learning. This type minimizes the importance of individual initiative and requires the organization to ensure that the individual understands the need and engages in the learning.<sup>47</sup> The second type is synergistic. This type requires the initiative of the individual to complete the learning and is tied to organizational motivation to learn.<sup>48</sup> The individual's focus is on current or future job duties. The organization has to create an environment that supports this type of initiative and learning opportunity for the individual to successfully engage.<sup>49</sup> Finally, voluntary learning projects are the third type. This learning project is less tied to the organizational conditions and more keyed on the individual desires and needs. Additionally, these projects may not be directly relevant to the operation of the organization.<sup>50</sup>

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<sup>45</sup> Ibid., 430.

<sup>46</sup> Alan Clardy, "Learning on their own: Vocationally oriented self-directed learning projects," *Human Resource Development Quarterly* 11, no. 2 (Summer 2000): 105.

<sup>47</sup> Ibid., 112.

<sup>48</sup> Ibid., 114.

<sup>49</sup> Ibid., 117.

<sup>50</sup> Ibid., 115.

The most relevant type of Clardy's typology to today is the synergistic type of learning project. This indicates that any institution needs to provide opportunity, motivation, and an environment that encourages individuals to learn. Army doctrine encourages this type of environment, but individual units would need to ensure that this environment exists at the lower level as well. The individual develops motivation based on the need in their situation. However, the first component, opportunity may be the most difficult to enable for many potential learners.

Brockett and Hiemstra give some insight into what they perceive as some of the misunderstandings of self-directed learning and what it does for an organization.<sup>51</sup> They provide a list of what they term as myths that organizations should be aware of when preparing and implementing self-directed learning.<sup>52</sup>

First, self-directed learning is not an all or nothing concept.<sup>53</sup> Educational programs should develop according to the needs of the organization. There is a place for the pedagogical learning environment just as there is a place for self directed learning. The two must exist together in a synergistic relationship.

Similarly, self-direction does not mean the learning happens in isolation. Any technique should consider the blending of other methods as appropriate.<sup>54</sup> The blending of the soldier's learning experience should include the pedagogical components that provide the necessary basic skills. Additionally, the soldier should self direct themselves into other learning experiences that closely match their current needs. The soldier should not exist by themselves in the situation without interaction with others who may hold relevant knowledge.

Their last commentary is that self-directed learning is not necessarily the best learning method in all situations. While most self-directed learning methods and articles focus on the application with adult education, this method is applicable and other methods may have more

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<sup>51</sup> Ibid., 116.

<sup>52</sup> Ralph G. Brockett and Roger Hiemstra, *Self Direction in Adult Learning* (New York, New York: Routledge, 1991), 11.

<sup>53</sup> Ibid.

<sup>54</sup> Ibid., 10.



relevance or better results than self-directed learning.<sup>55</sup> The profession must carefully examine and understand the needs of the learner to ensure that the right mix of pedagogical and andragogical methods are applied. The misapplication of any learning method will not produce the desired outcome.

## Motivation in Self-Directed Learning

Garrison states “self-directed learning is more than learning on your own, it is required for any quality learning experience.”<sup>56</sup> His statement indicates that there is a belief that any learning experience has a self-directed component. The learner should be aware of their part in the learning experience and how that impacts the effectiveness and quality of their outcomes. This matches some of the other theorist’s ideas of motivation and responsibility. Because this may be an important part in any learning experience in the current environment, it merits discussion.

As indicated in some of the educational models, the motivation of the learner is important in all situations. In the case of self-directed learning, it is critical due to the andragogical orientation of this method. Without personal motivation, the learning is unlikely to be successful or uninitiated. This is especially true for situations where time is extremely limited.

One study found some correlation between the level of management, type of job, and the readiness of the individual to engage in self-directed learning.<sup>57</sup> This analysis used several studies to attempt to identify the key conditions necessary for self-directed learning to be appropriate. The author found that as the level of management, creativity needed, performance

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<sup>55</sup> Ibid., 11.

<sup>56</sup> D. R. Garrison, “Self-directed Learning: Toward a Comprehensive Model,” *Adult Education Quarterly* 48, no. 1 (Fall 1997): 31.

<sup>57</sup> Jarold Abbott, and Sue Dahmus, “Assessing the Appropriateness of Self- Managed Learning,” *The Journal of Management Development* 11, no. 1 (1992): 55.

rating, and degree of change in work increased, the readiness to conduct self-directed learning increased as well.<sup>58</sup>

Kolb provides additional relevant points. First, readiness to learn impacts the learning experience.<sup>59</sup> The individual must be motivated to learn. The learning process is active, and requires individual motivation to engage in the activity. Preparation is required to ensure the individual is capable of learning in the environment.

### Organizational Requirements for Self-Directed Learning

Organizations have roles in enabling the self-directed learning of their members. The resourcing, enabling, and emphasis of the organization influence the learner's results. This will also impact the motivation of the learner through various means which is a component of successful self-directed learning. Several of the authors indicate roles and characteristics of organizations that enable effective self-directed learning.

The first characteristic that seems to be prevalent in organizations that have effective self-directed learning is the culture. These organizations have developed cultures that enhance the ability of the learner to learn through many different means in the organization.<sup>60</sup> These organizations have created an understanding in the members that learning is valued and often required for the individual and organizational success. As a means of comparison, the Army provides numerous opportunities for education, but has relied on more pedagogical methods. The award of promotion points for correspondence courses and schools creates the impression that education is valuable to the Army and that it is necessary for the individual to take responsibility to enhance their skills.

The Army could enhance self-directed learning opportunities using some of the recommendations provided in current literature. Two of the more useful writings by Chien and

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<sup>58</sup> Ibid., 52.

<sup>59</sup> Kolb, 52.

<sup>60</sup> Min-Huei Chien, "The Relationship between Self-Directed Learning Readiness and Organizational Effectiveness," *Journal of American Academy of Business* (March 2004): 286.

Confessore have some similar themes that indicate some of the key aspects for enhancing new means of learning. These recommendations take two forms, enabling the individual and enabling the learning event.

The organization plays an important role in enabling the individual to ensure that they are ready and motivated to engage in self-directed learning. First, Chien and Confessore both argue that the organization has a responsibility to ensure that the individual understands that there is a need to learn. This is a different perspective than the other authors, such as Knowles, who argue individual responsibility. Chien provides one method where the organization negotiates a learning contract with the individual. This contract would outline the requirements and direction of the learning for the individual.<sup>61</sup> Confessore is less prescriptive and states that the organization should only communicate the goals and expectations, stopping short of establishing a contract with the individual.<sup>62</sup> He goes on to state that the human resources department of the organization should provide advice and support to help enable the learners.<sup>63</sup>

Chien takes a slightly different perspective and states that the management should help the employees develop positive attitudes and feelings of independence relative to learning.<sup>64</sup> This is somewhat at odds with his concept of the learning contract and identification of a starting point for a learning project, but it does reflect a need for a more individual motivation based outlook on the learning project. In addition, Chien indicates that trust and openness is a valued atmosphere that should exist for the individual.<sup>65</sup>

These relate to the environment that the profession of arms should have to enable the self-directed learning that is necessary for the success of the individual and units. The Army's counseling system has components that provide some of the recommendations that both Chien

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<sup>61</sup> Ibid., 288.

<sup>62</sup> Sharon Confessore and William Kops, "Self-directed learning and the Learning Organization: Examining the connection," *Human Resource Development Quarterly* 9, no. 4 (Winter 1998): 366.

<sup>63</sup> Ibid., 367.

<sup>64</sup> Chien, 288.

<sup>65</sup> Ibid.

and Confessore have. As an example, the Junior Officer Developmental Support Form should enhance the self-directed learning of the individual officer by establishing the need for development, providing advice, and feedback that is indicated as important for this process. The development of a desire to learn and improve in the professional is a key component in the successful use of any learning project.

The organization itself must be capable of enabling the learning. Confessore states that there should be methods to connect people and gather data for use in these organizations.<sup>66</sup> Chien also states that the organization should train the staff on self-directed learning and consciously develop opportunities for the members to take advantage of this learning.<sup>67</sup> This is also supported through the education of the individual in computer literacy skills for both the internet and computer network. Computer skills enhance and enable the individual to take advantage of the various resources available through both. The military already has many of these systems in place to ensure that the members have the skills and access necessary to take advantage of self-directed learning opportunities. The current operational environment tempers this situation as necessity requires the member to focus on the situation.

Doctor Clardy also indicates that the organization should determine where the self-directed learning is occurring in their organization in order to better understand and enhance the activity.<sup>68</sup> Other authors, such as Brockett, believe that the educators can play a role in enhancing the learning, but instead look to understand what is happening without the direction of the organization and then enhancing what already exists versus creating the system from scratch. The organization is able to minimize the resources that it applies in the development of the self-directed learning systems and also capitalizes on the methods and sources that the members have developed trust with previously.

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<sup>66</sup> Confessore and Kops, 365.

<sup>67</sup> Chien, 288.

<sup>68</sup> Clardy, 123.

## Problem Centered Learning

Malcolm Knowles provides an interesting perspective for learning. He divides the types of learning into two categories. The first category is termed “problem-centered” learning.<sup>69</sup> Here, the learning activity focuses on a specific problem or issue that faces the learner. The system constructs the learning activity around the specific problem and situation.

The other category is “performance-centered” learning. In this case, the organization selects the learning objective.<sup>70</sup> The organization evaluates the learning to determine achievement of the educational objectives. These two categories are useful in understanding some of the motivational and organizational needs for learning.

Knowles argues that adults are more problem centered in their learning focus. They are motivated to learn by the problems that they encounter. This motivation is useful to the organization to facilitate learning. The adult will seek out the learning events in order to solve problems.

There are key differences in the makeup and conduct of problem-centered learning versus performance-centered learning.<sup>71</sup> Professionals are more likely to respond to the problem centered learning versus performance based learning. This gives an advantage to any educational method that utilizes a problem focus. This also provides insight into the reason for complaints of lack of relevancy in classes.

To maximize the use of a problem-centered focus, the Army must do several things, according to Knowles. First the educators must share the focus of the learner.<sup>72</sup> This allows the educator to best facilitate the learning activities.

Second, the curriculum should be organized to facilitate the learning.<sup>73</sup> In this case the educator should develop learning activities that directly relate to the problem. The educator

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<sup>69</sup> Knowles, 52.

<sup>70</sup> Ibid., 53.

<sup>71</sup> Ibid.

<sup>72</sup> Ibid., 54.

should also understand the skills that support this activity and ensure they are in the activity. This allows the maximum use of the motivation provided by the problem-centered focus.

Finally, the starting point should be on the problem itself. This allows a focus on the problems that are on the mind of the individual as they enter the problem.<sup>74</sup> Again this requires an educator that understands the learner and the problem. It keeps the learning activities in line with the learner and their problems.

A problem-centered focus seems to be necessary and valid for the education of professionals. It also seems to be the method most used in professional education. While there are some places that require a performance centered approach it may not be as useful to the Army. In a high demand environment, the problem centered focus may allow the best results due to the needs of the soldiers.

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<sup>73</sup> Ibid.

<sup>74</sup> Ibid.

## CHAPTER THREE

### **A NEW WAY OF LEARNING.**

Much attention has been given to the learning organization and the community of practice as the workplace and the global economy has evolved over the past ten years. Many companies and schools have attempted to harness the rise of the internet and their internal networks to enhance the skills of their employees and create more efficient and effective organizations. This has created a new sector of information technology that focuses on enhancing knowledge transfer and organizational learning. However, the results are difficult to measure and defy easy explanation that convinces the general audience and the leadership of these organizations of efficacy.

Despite the difficulties, many organizations have institutionalized methods for knowledge capture and transfer in organizations. In conversations with the members of the organizations that have adopted or are attempting to adopt knowledge management initiatives, they identified the need through perceived failures to perform in periods of change. One approach to solving this problem has been the community of practice.

Due to the demands of the business environment, many businesses have sought new methods of improving the knowledge transfer of employees. Previously internships and paid educational opportunities provided the necessary learning opportunities for business. However, with many employees changing jobs often, the return on investment of paid education caused many corporations to minimize the amount of investment into education. Additionally, the necessary type of knowledge did not come from the universities and vocational institutions as before. Employees were challenged to solve problems quickly with little preparation for the task. Learning was inside the experience, and the successful companies worked to transfer best practices to other parts of the organization. As a result, learning activities became more

experiential. The teams conducted the learning activities directly between teams. The learning was self-directed and without the benefit of instructors or facilitation.

## **The Community of Practice**

The Community of practice became a means to achieve the learning that many corporations desperately needed. Employees shared their problems and solutions with fellow employees. Ideas and stories were shared via an online websites to communicate to the maximum audience. This worked well for companies that were experiencing downsizing, rapidly changing work environments, or employee turnover.

The most common representation of a community of practice is the online forum that a group of people participate in to communicate ideas and stories. The word community conveys the focus of the organization on the members and their active participation. Generally these members share a common need or problems.

The U.S. Government has experienced a period of significant downsizing and transition with the age of smaller government and an ageing workforce. Often, as individuals leave the service of their nation, they take the knowledge of how to conduct their job with them. While the scope and specifics of their duties may be documented through job descriptions and mission statements, the essence of their duties may be much more tacit in nature. Tacit knowledge is difficult to express and capture, inhibiting the ability of the new personnel to understand how to accomplish the duties they are tasked with.<sup>75</sup> In environments where the resources funding the workers dropped, the effectiveness of the organization plummets. Capturing and transferring this tacit knowledge is critical to the success of the organization.

The U.S. military experiences job turnovers and transitions at a much higher rate than most other parts of the government or private sector due to reassignment and personnel programs.

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<sup>75</sup> Nancy Dixon, *Common Knowledge: How Companies Thrive by Sharing What They Know* (Boston: Harvard Business School Press, 2000), 144.



This caused the military to enhance its skills in capturing knowledge through SOP and regulations and preparing individuals for these tasks prior to the recent crisis that many parts of the government felt. The current operational environment is somewhat different, due to the rapidly changing circumstances in which many of the officers and non-commissioned officers find themselves. Capturing the knowledge that makes a successful staff officer operating in a specific region of Afghanistan or Iraq provides a challenge that may be addressed through some of the methods that the government and private sector have developed.

St Onge and Wallace explain some of the trends and implications that drive the need for communities of practice.<sup>76</sup> They identify many of the environmental trends of the global economy and their implications as forces that propel organizations to need communities of practice to cope. The increasing complexity of work, consolidation, partnerships, alliances, downsizing, outsourcing, and a desire not to relocate and travel have created several requirements for organizations.<sup>77</sup> First, the organization must be much more interdependent to cope with the increase requirements for complexity and speed. Second, individuals must cross older functional boundaries in order to compete. And finally, organizations are more geographically dispersed than ever before. All these things create organizations that need communities of practice to share knowledge and learn.<sup>78</sup>

These trends and implications have direct application to the military due to the operational environment that has developed over the past fifteen years. The use of units in non-traditional roles, such as Air Defense Artillery and Artillery units in patrolling in peace enforcement operations, has created the cross-functional work dynamic that has driven leaders to learn from all facets of the organization and not just the parent organization or branch. This drives a greater interdependence between units and services to cope with the rapidly changing

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<sup>76</sup> Hubert Saint-Onge and Debra Wallace, *Leveraging Communities of Practice for Strategic Advantage* (Boston: Butterworth Heineman, 2003), 62.

<sup>77</sup> Ibid., 10.

<sup>78</sup> Ibid., 62.

environment. Additionally, the rotation of units and development of the expeditionary Army has created a geographically dispersed group of people who have knowledge that is necessary for the success of the units that follow them in later rotations and to different environments.

The military, as a whole, has been coping with this problem for many years and has created mechanisms to share this knowledge through various means. The Center for Army Lessons Learned (CALL) has developed many products that are the result of collection efforts they made to gather the knowledge and transmit it via various forms. Yet most soldiers do not use CALL because the information is “stale” and lacks the relevance desired by the soldier.<sup>79</sup>

Another mechanism is the informal sharing of information via email. The amount of observations and knowledge transmitted via email has not been measured. Most officers share emails with information gathered on current operations, past experiences, and other topics to their unit and colleagues. OPDs, unit visits, and the “right seat ride” are all manifestations of coping mechanisms with an environment that denies our profession the ability to write and publish doctrine that will keep pace with the situation.

As a result, communities have grown in response to the environment. These communities vary significantly by whom they serve and the purpose they fulfill. Etienne Wenger categorizes communities through the relationship to the organization. He states that there are five relationships that these communities can have with the organization; unrecognized, bootlegged, legitimized, supported, and institutionalized.<sup>80</sup> The first two, unrecognized and bootlegged are examples of communities that the organization is either unaware of or does not support and view as legitimate. These communities have severe challenges to gain the resources and access that would make them as useful and powerful as their potential.<sup>81</sup> The communities sharing information via email is an example of the unrecognized and bootlegged communities that may

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<sup>79</sup> Dan Baum, “Battle Lessons,” *The New Yorker*, 17 January 2005, 45.

<sup>80</sup> Etienne Wenger, Richard A. McDermott, and William Snyder, *Cultivating Communities of Practice: A Guide to Managing Knowledge* (Boston: Harvard Business School Press, 2002), 26-27.

<sup>81</sup> *Ibid.*, 28.

have value to the community but may also be creating situations where the information is inaccurate, incomplete, or in the case of sensitive information, dangerous. These communities do enhance the learning of the individuals involved, but much is lost if the system fails through a bad interpretation, assessment, or the compromise of sensitive information to individuals.

The other types of communities are the ones that provide the organization with the greatest ability to oversee and benefit from. While the community may not gain great benefit from the recognition and legitimacy given by an organization, the potential gains for the organization provide value. The Army's legitimization and support for communities like CompanyCommand.com provided resources, legitimacy, and support that enhanced the community. It allowed for a greater range of potential methods and mediums that were inaccessible prior to the support. Additionally, the oversight has been, up to this point, intentionally limited to avoid some of the potential negative outcomes from interference.

As a result of the legitimate support and development of these communities, effort has been given to determining how they work in order to attain understanding of the process that influences their operation. One recent article by Swee Goh portrays an integrative framework that explains the community of practice by explaining how the knowledge transfer works.<sup>82</sup> His article argues that leadership, trust, and problem solving behavior contribute to the propensity to share. Once there is an environment that supports a learning culture, the support structures, knowledge recipients, and types of knowledge facilitate the effective transfer of knowledge. The Army strives for a learning environment. With an environment that supports learning, the Army must structure and resource the organizations that support the transfer.

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<sup>82</sup> Ibid., and Swee C Goh, "Managing effective knowledge transfer: An integrative framework" *Journal of Knowledge Management* 6, no.1 (2002): 23.

## Community Structure

The online community must organize itself to facilitate the effective transfer of knowledge from one member to another via the community. One author indicates that the learning activities themselves should allow the learner to access their personal knowledge and beliefs.<sup>83</sup> The use of reflective methods is important and should be enhanced by the structure of the community. Reflection must be a key component in participation in an online community. The member who provides an insight or story must reflect on their personal experiences to adequately answer questions or provide advice. Facilitators of the community should also focus on the members who are providing some insight and pose questions to the member as teacher that will cause reflective thinking as well. In this case, the member as teacher is the one who may benefit the most from the conversation by clarifying their own experiences.

Goh argues that there are four key factors influencing the effective knowledge transfer inside an organization.<sup>84</sup> He deliberately focuses on what he terms as the “soft” factors that influence effective knowledge transfer. Leadership, high trust, problem seeking and solving, and collaboration are the factors that develop an organization’s propensity to share knowledge.<sup>85</sup> The leadership of the organization must set the example and be role models that the members are willing and able to emulate. This will develop trust between the members and in the leadership. The leadership must also encourage the members to seek and solve problems. This focus will drive the organization, when coupled with trust, to collaborate to solve problems. This organization is an example of the ideal that the military sets for its units and leadership. Intent, initiative, and trust are all key components of effective units. Collaboration has not been mentioned or emphasized until recently, but now receives emphasis due to the various collaborative planning tools available.

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<sup>83</sup> Barbara Daley, “Learning and Professional Practice: A Study of Four Professions,” *Adult Education Quarterly* 52, no. 1 (November 2001): 41.

<sup>84</sup> Goh, 23.

<sup>85</sup> *Ibid.*, 25.

Goh then explains that the final three factors contributing to effective knowledge transfer are the support structures, the recipient, and the type of knowledge.<sup>86</sup> These factors directly influence the effective knowledge transfer versus the previous factors that have more of an enabling effect. The support structures are the systems that transfer the knowledge. This could take the form of a network, web design, meeting, or some other means. What is important is the community that it is based on versus the structure itself. The resources allotted to the effort not only provide the ability to do the knowledge transfer but also tells the member how important it is to the organization through the visible allocation of resources and emphasis.

The ability of the member to learn is critical to the process. If the member is unwilling or unable to learn, the process fails. Some methods of measuring the readiness of individuals to conduct learning have been developed. These measures indicate, in a general sense, that as level of management, creativity required, and problem solving need increases, the readiness to learn increases.<sup>87</sup> This would tend to indicate that as the operational environment changes and more creative problem solving is required, the members of the military will become more ready to learn in this form.

The type of knowledge is the final factor influencing the transfer of knowledge.<sup>88</sup> Organizations must assess what types of information are being transferred in its communities and ensure that the mechanisms match the type of information transferred.<sup>89</sup> In this case, Nancy Dixon provides an excellent framework for categorizing the types of knowledge transfer through defining the type of knowledge, the context of the task, and the nature of the task. She also gives design guidelines for how the dissemination is best accomplished.<sup>90</sup>

One relevant example of this methodology is the near transfer. In this case, a group or individual has gained some explicit knowledge pertaining how to do a task that is directly

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<sup>86</sup> Ibid., 29.

<sup>87</sup> Abbott and Dahmus, 55.

<sup>88</sup> Dixon, 144.

<sup>89</sup> Goh, 29.

<sup>90</sup> Dixon, 144.

reusable to another team somewhere else. The receiving team or individual is doing a similar task in a similar context. If the knowledge is generally explicit, the knowledge can be captured in written form and pushed to the receiving team via electronic means.<sup>91</sup> If the task is a non-routine task that requires tacit knowledge then the exchange should become reciprocal and collaborative.<sup>92</sup>

Building on the concepts above it becomes apparent that the community of practice cannot be a cookie-cutter fit for all the communities that potentially could spring up in the military. Many of these do not require a community of practice to develop and cultivate the knowledge necessary to be successful. However, if the community is faced with a significant range of difficulties, challenging environments, and a high requirement to adapt, a community to connect and share will be helpful. The organization then must decide how to best develop and implement a community of practice that enhances the existing connections among the members of the community.

## **Communities Built on People**

One key concept that must be discussed is what a community of practice is. While many communities of practice might be represented through some form of an online website, database, or forum, the community of practice is a community of people. Despite the representation of the community through one of these mediums, the people contain the knowledge and are the source of the community's assets. The websites are a communication process and only one of the interacting contexts as defined by Mezirow.<sup>93</sup>

Access to the information contained in one of these mediums does not necessarily enable or enhance the learning of the individual. By applying the learning models from earlier discussions, it becomes evident that the knowledge is really generated and transferred in the

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<sup>91</sup> Ibid., 76.

<sup>92</sup> Ibid., 144.

<sup>93</sup> Mezirow, 33.

experience of the individual. Without the individual taking and applying what they have learned, the information is useless and the community is failing to contribute to development of the forum as a whole. There is indication that the members of the community begin to participate more as time passes and the level of their experience expands.<sup>94</sup> The members of the community may enter and merely watch for a long period of time until they have developed the confidence and trust necessary to contribute in a more meaningful way.

To approach the development of communities of practice, most authors point to determining who the community consists of prior to the establishment. Powazek terms this as determining the audience. This audience is identified as the foundation that the online representation of the community is built upon.<sup>95</sup> This audience should demonstrate a need and desire for a community of practice. The leadership should be cautious to ensure that the community is not doing this for the wrong reasons. In many circles, having a web page is “cool” and Powazek cautions against this, noting that the overhead for hosting a webpage will require resources that the organization might not have considered in a snap judgment to pursue this.

St. Onge and Wallace provide architecture to help develop a community of practice around an existing community. They state that there are four key components that make up a community; productive inquiry, community conventions, generative capabilities, and tools and technology.<sup>96</sup> Each part of the architecture provides useful insight into the online community and its design.

The first part is productive inquiry. It acts as a catalyst to drive the community. Without it, the community will have no need to exist and will not thrive. This could be used as screening criteria for the development of the communities. If the existing community does not have a drive

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<sup>94</sup> Sharan B. Merriam, Bradley Courtenay, and Lisa Baumgartner, “On Becoming a Witch: Learning in a Marginalized Community of Practice,” *Adult Education Quarterly* 53, no. 3 (May 2003): 184.

<sup>95</sup> Derek M. Powazek, *Design for Community* (New Riders Indianapolis: Indiana, 2002), 4.

<sup>96</sup> Saint-Onge and Wallace, 79-80.

to develop or inquire into the problems that face their community, it is unlikely to succeed as a viable method for sharing.

Second are the community conventions. The communities follow these guidelines in the productive inquiry for problem solving and knowledge transfer. If the community has conventions or guidelines that prohibit the transfer of knowledge then careful consideration must be given to change either the convention or developing a means of overcoming the convention.<sup>97</sup> One possible example of this would be security issues among some of the communities. If the guidelines and regulations prevent the transfer of the knowledge, then the community may not be capable of existing in prohibited mediums and may have to rely on other methods to develop the community.

Third are the generative capabilities. These are the capabilities that the community has at its disposal to enhance the learning and collaboration. These go beyond the ability of the members to learn from the content contained in the community. This also relates to the ability of the community to synthesize and develop knowledge based on conversations and varied methods of transmission.<sup>98</sup> This may require the use of facilitators and leaders in the community who work to synthesize, collect, direct, and assist in the dialogue of the community. These facilitators and leaders must understand the importance of their role in the community.

Additionally, the community must use available subject matter experts. These experts provide knowledge to the community expanding the knowledge base available. Again, the facilitators of the community would coordinate the subject matter experts and members to answer questions and contribute in the conversations.

Finally, the tools and technology also form a part of the architecture of the community. St Onge and Wallace advocate that the chosen tools should remain standard across the organization in order to minimize the amount of training and maximize the familiarity and

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<sup>97</sup> Ibid., 82.

<sup>98</sup> Ibid., 87.



comfort with the chosen systems.<sup>99</sup> This is an important factor in the development of the community, but only so far as to ensure that the chosen tools accomplish the needs of the community. These authors advocate a careful selection that facilitates rich conversations, encourages participation, supports access, and provides flexibility. This field is rapidly changing and requires innovation to keep pace with the innovation in automation and media.

## **Communities for Professionals**

What defines the professional forum? CompanyCommand.com defines itself through its purpose statement as posted:

Our purpose: We are on a mission to connect company commanders--past, present, and future--together in a conversation specifically about building effective units. Why? Professionals who are fiercely resolved to prepare for combat and who continually share what they are learning with each other will be more effective and will grow more effective, combat-ready units.<sup>100</sup>

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<sup>99</sup> Saint-Onge and Wallace, 83.

<sup>100</sup> U.S. Department of the Army, Company Command, Building Combat-Ready Teams, West Port: New York, Available from <http://companycommand.army.mil>, Internet, Accessed on 12 December 2004.

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**CompanyCommand.com is company commanders—present, future, and past.** We are in an ongoing professional conversation about leading soldiers and building combat-ready units. The conversation is taking place on front porches, around HMMWV hoods, in CPs, mess halls, and FOBs around the world. By engaging in this ongoing conversation centered around leading soldiers, we are becoming more effective leaders, and we are growing units that are more effective. Amazing things happen when committed leaders in a profession connect, share what they are learning, and spur each other on to become better and better.

*It is our privilege to announce this year's top [Leadership in Action!](#) stories.*

*Do you want to be instantly sent to the Company Command Community after logon? [Read this tutorial on how to set your logon preferences.](#)*

**LOGIN** ?

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CompanyCommand is a professional forum for U.S. Army Company-Level Commanders. You must be a logged-in member to participate. Membership is manually approved and is available only to Company-Level Commanders as well as currently commissioned officers who are either preparing for command or who have commanded in the past and desire to contribute to current company commanders.

**CompanyCommand Members: Login and connect with your comrades**

**FRG Leaders**      **Pro Reading**

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*Company Team: Dedicated to developing Exceptional Leadership at the Company Level*

**Figure 1. CompanyCommand Purpose Statement.**

This purpose is written to specifically speak to what CompanyCommand.army.mil intends its forum to be, who it serves, and what it accomplishes. Others provide similar statements that focus on several common components. First, these forums are composed of professionals who desire to improve their unit. The commitment of professionals is what keeps these communities growing and relevant, especially during the period following initial growth. Much of the community's content and structure is done by volunteers who have demanding duties outside of the maintenance of a professional forum. Second, these communities indicate conversation as a key component to the forum. This conversation takes the form of several different methods. The first, and most common, is the use of threaded discussions among the members of the site. Other forms include interviews with the opportunity to post comments and questions.

Most of the most vibrant communities contain large amounts of content in the form of documents, presentations, and multimedia files. The community leadership uses the content to attract and keep the members returning to the site. Often, the community leaders build a great deal of the content themselves that entices the community members to add additional content. Some of the most important content is added by the members of the community who are performing the duties that is the focus. The organization of the site often highlights the content first, but provides opportunity for the member to engage in online forums about the topic.

The management of the site is usually a small group of full time people with a slightly larger organization of volunteers that facilitate the site based on the organization. In most cases, the site provides quick access to key topics that are important to the community. This allows the members to quickly navigate to these sections to find things of interest to the member.

The member operates in two roles, learner and teacher. In many cases the member will go to the site with the intent of viewing in one role but operates in the other role. The facilitators of the site work to ensure that as one member enters the site to learn, others are available to serve as the teachers on the site. For instance, if a member asks a question, the facilitator that focuses on the general topic may contact a member whom they know has a potential answer or advice. This allows the communication between the two members and facilitating transfer of knowledge between the two. However, if someone has a question or problem previously addressed they may enter the site, get the information, and leave without actively participating in the site.

For the purpose of this analysis, three groups will be used to discuss the membership of the community. First, the administrators of the site focus on the technical aspects of running the community. Second, the facilitators focus on the activity in the community. Third, the members serve in two roles, teacher and learner. While other models of the membership of a community are explained in the research, this one will allow the discussion of roles and responsibilities in a common perspective, allowing comparison among a range of models. It is also important to point out that members may move in and out of these roles over time.

As a result of the implementation of these sites by the Army, these communities have been termed “Professional Forums.” The founders of the idea chose this term to communicate the idea of the community existing to serve the profession and the communication that exists in the community. Doctrine does not define this term due to the relatively new nature of the online community for the Army. While the Professional Forum exists partially as an online community, not all online communities are Professional Forums. Some technical forums are more aligned to serve a larger community of individuals that exist in and out of the profession. They are also different from the unmonitored forums such as those on Army Knowledge Online (AKO). AKO provides a quick way to communicate, but these forums quickly turn negative and lose focus. It is not uncommon to see topics as varied as FA 30 qualification to “Sex in Iraq.”<sup>101</sup> While useful for some purposes, these forums lack the focus necessary for serious professional discussion. This monograph will focus primarily on the Professional Forum application of online communities, with the understanding that the online community in general may become much more prevalent than the Professional Forum. Many organizations see a need for some implementation of the online community while the professional forum typically has a grass-roots genesis.

## **The Historical Context of the Professional Forum**

The Professional Forum seems to be new because of the application and formation on the internet. However, if the internet component of the forum is removed from consideration of the concept, comparisons can be made to other organizations and activities. The removal of the technology from consideration is integral this concept. The online community should be defined by the people and their interaction rather than the technology. With this in mind, consideration of

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<sup>101</sup> U.S. Department of the Army, Army Knowledge Online. Available from <https://www.us.army.mil/suite/portal/index.jsp>, Internet, Accessed on 30 January 2005.

the idea of what the online community does indicates some useful comparisons to previous activities and ideas.

## Social Aspects of the Online Community

One of the first and most evident activities that occur in these forums is the threaded discussions. These range from general discussions of methods and ideas to more specific and technical topic. These discussions usually occur with several individuals writing to provide their ideas of solutions or feedback to the person who posed the question or explained the situation. This sort of activity is similar to informal meetings, “club-calls,” or other activities. While most would agree that the club system and the social aspect of the Army has been on the decline over the past few years, these are still used as a forum to discuss and transmit ideas among the organizations.

In the Creighton Abrams biography, *Thunderbolt*, there is an example of seminars held that were tutorials in command.<sup>102</sup> Then Major Abrams presented anticipated problems that were then discussed among the group to determine solutions. The group discussions lacked inhibition and caused stimulation. As time went on, the stimulation drove the participants to discuss and fight for the application of their solution. This example, while brief in the book, is a goal for what the online community or professional forum should be. Without the passion created by challenge, motivation, and stimulation, it is unlikely that he could achieve the full benefit.

In the context of the unit conducting such a social event, the elements of learning and team building are prominent. The members have the opportunity to discuss things that are relevant to the current situation facing the unit. Topics of discussion include training, operations, and leadership. Members tell stories to highlight lessons learned. Comparison to the Professional Forum has some usefulness to understand the desire to learn.

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<sup>102</sup> Lewis Sorley, *Thunderbolt* (New York: Simon and Schuster, 1992), 112-113.

The online community also brings these members to a common virtual location and allows the free discussion of many different topics. The differences between these two activities are important for understanding the difficulties of the online community. First, the communication in the online community is usually asynchronous. Members communicate via written discussions. The asynchronous written form of communication creates some difficulties in the communication of ideas between the members. Written communication does have some advantages. The person contributing must think through the problem and the knowledge they are sharing. The thought put into the written communication allows organization of the communication. Others can easily capture the communication for storage or communication through other means.

Second, the members do not share a similar context or perspective in the attempt to solve the problems that the individual is facing. When the members of a unit are discussing a problem, they generally share understanding and perspective that allows more precise and concise discussion of solutions. The professional forum does not provide this and may require more communication to solve problems or even to understand the problem at hand. While this lack of shared perspective may allow for problem solving that might ordinarily not happen with people who share a common understanding, the potential for error in understanding is higher due to missed meaning or lack of clarification.

Finally, the professional forum does not necessarily contain the same level of trust that the unit social activity would have. This is important, as previous models identified that trust is important for sharing and knowledge transfer. This trust is not natural for a person to develop without the understanding and personal knowledge of the individual. This may be in question, however, as the newer generations of soldiers enter the Army who have had a much greater interface with the online communication than the previous generations of soldiers. However, the trust built in a unit and placed in the conversation between the members of a unit is very important for the value that the individual will place on the advice, ideas, and stories that is

transmitted. Building this confidence is important for the successful use of the forum as a means of communicating.

## Officer Professional Development (OPD) Replicated

The professional development activity is another model of how the expertise is transmitted among the members of an organization. Usually called an OPD or NCOPD, the professional development activity involves a subject matter expert who communicates ideas or stories relating to a specific topic of expertise. Online communities replicated the professional development activity using videos and written stories. In this case the professional development activity conducted in the presence of the soldiers has an advantage in the use of synchronous communication. The participants can directly question the presenter and discuss the topics at hand. However, if the professional development activity is transmitted via a video format, the participant does not have to be present to hear the stories and ideas. This could be helpful for the individuals who might be encountering a topic or problem much later than the recording. In the context of a unit or organization conducting the professional development activity, if someone misses the event, he or she would have to discuss the topic with someone who did attend in the attempt to gain the knowledge imparted.

In this case, the professional forum has an advantage. The professional development activity could last for significantly longer periods with many more transmissions of ideas and stories. If the subject matter expert participates in the forum for a longer period and answers the questions posed during the life-cycle of the posted professional development activity, it could capture and transmit a much greater amount of information. While the potential issues of trust and confidence in the presenter would still have the same difficulties, the opportunity is there for a similar or larger audience, and discussion of the topic and related subjects. This would be dependent upon the ability of the presenter to continue with the topic.

An important consideration is that in all of these examples of what the profession has done previously, the knowledge transferred is both tacit and explicit. Explicit knowledge, such as procedures, standard operating procedures (SOP), and standards, is easy to communicate between individuals.<sup>103</sup> The members of the organization can quickly communicate this via various methods, including documents. Tacit knowledge is much more difficult. Tacit knowledge is the knowledge that is difficult to communicate and often referred to as intuition.<sup>104</sup> Tacit knowledge is difficult to explain or verbalize and thus defies easy codification. In this case, stories are told to communicate what the members may not explicitly know or understand. The members who are receiving the knowledge may only really transform this learning in the conduct of their duties. The stories they heard in these activities may allow the member to perform their duties differently, even more effectively, than without the experience. However, the members value the experience itself. Experiential learning is one of the key models that has influenced education and the Army.

Applications of various techniques of communication of the ideas and knowledge among the members of the unit could be examined. These activities always involve a communication process where the members come to a location that is typically isolated from the work environment and distractions. The members engage each other to learn the topic and understand. The presenter allows questions and answers them with the members valuing candid responses. The leadership expects members to take notes and ask incisive questions. The value is often unscientifically measured by the attention given by the members and the number of questions asked.

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<sup>103</sup> Dixon, 26.

<sup>104</sup> Ibid., 27.



## **Rapid Learning**

The challenges presented by the contemporary environment are similar to the challenges facing businesses today. Businesses must contend with increased distances for communication and dispersion of the elements of their organizations. This is very similar to the situation that units face on the battlefield today. The competition is very difficult and requires rapid learning for both business and the military. However the stakes for the Army are much higher than those for business.

The Community of Practice has provided a means for these businesses to learn in the new environment. They provide a place for the members of the community to share ideas and communicate in ways that are very similar in content and form to older methods. The difference is the means of the communication. This new means allows the sharing to occur without the close proximity of time and space.

The Professional Forum is an Army version of the community of practice. It meets the needs that have developed due to the COE. The sharing of knowledge among professional soldiers allows preparation for experiences on a scale much larger than ever before. The professional forum will provide a much greater base of knowledge than might have existed without a great amount of expenditure of time and effort.

The learning occurs because of the experiences the soldier faces. The soldier learns through the reconciliation of the conceptualization built by using the forum. Then, the soldier enters the experience and reflects upon the experience. The professional forum provides a means to reflect and receive feedback that can further develop the new knowledge from the forum.

The experience is the centerpiece for the soldier and the forum. This maintains a problem-centered focus that will enhance the conversation on the forum and build motivation for the members. These experiences have been the centerpiece of doctrine and regulations for many

years. This will not serve as a departure from the past, merely provide a more efficient and powerful means for the professional to continue learning.

The amount of shared knowledge is much greater than the doctrine and limited instructor base of the school. However, the schools must be intimately involved with the professional forums due to the need to develop the professional lexicon, knowledge base, and communication skills necessary to effectively use the professional forum. We should not view one as supporting the other. The perspective of the whole profession is what is important. The schools learn from the forums. The forums can exist due to the efforts of the schools. Doctrine develops from the efforts of both.

Members can build upon the knowledge of others. If an individual asks a question, others will answer based on what they personally believe is the right answer. However, in a room of four or five people when one answers the question the others will think of additional clarification or knowledge to communicate. The conversation builds. One small response might build to a much more powerful solution.

The community is built on a solid foundation of professionals who are concerned about the success of their unit. The profession takes a renewed emphasis on the individual and thus success of soldiers and units. Professionals desire to help others succeed. Contributing to the success of other units provides satisfaction for the soldier. Unit success builds the success of the profession by creating a drive to further build confidence and knowledge in the forum. Since the soldier and profession defines itself through experiences, the professional forum can capitalize upon the individual focus. The forum meets the educational needs of the individual by allowing the professional to focus on the things that they need most at that time. The professional enters the forum with a motivation driven by the situation they are experiencing. Personal observations of others builds trust among the community. Knowing that others have done similar allows the professional to build personal confidence they might not have otherwise had.

## RECOMMENDATIONS AND CONCLUSION

### Recommendations

The professional forum can enable the knowledge sharing that is needed in today's environment. The methods of communication fit into the methods that the Army needs to share among a diverse and challenging set of problems. Soldiers focus on problems and can use the professional forum to gain the information they need to understand their experiences. Their experiences will allow them to reconcile what they read from the forum with the problem they face.

Many corporations are using the community of practice to accomplish similar goals in situations that are similar to our own. The community of practice has developed into a growing field of expertise that is useful for any organization that desires to transfer knowledge. The ideas were based in the information technology community, but have foundations that are sound from an educational perspective.

The Army should support and cultivate the use of professional forums and integrate the professional forum as a component of the professional education system. The professional forum meets a need for knowledge sharing and communication that has developed because of the contemporary operating environment. The professional forum provides schools with the means to maintain a link to practitioners and avoid lag behind the current operational environment. Communities of practice contribute to the general education of the professionals and foster the concept of life long leader learning.

As a component of the integration, the Army must build trust in the professional forum. Trust is an important requirement for virtually all of the models reviewed in the preparation of this monograph. The Army can develop this trust through embracing the concept and connecting it with the foundational schools that the profession trust and respect currently. Early introduction

to the professional forum and linkage to the curriculum will permit a more productive exchange of ideas and knowledge.

This is also important because trust is a key component in any unit and the professional forum is built upon the communities that exist already. No one will share knowledge without a trust in the forum. Additionally, the member is unlikely to implement any ideas without a trust in the source and efficacy of the idea.

The profession must also emphasize professional forums in the schools. Explaining the need to be learners and contributors to the professional body of knowledge will provide motivation to participate in the forum. The member should feel a desire to learn and share in the forum. Each contribution may have the cumulative effect of creating knowledge in many other individuals. The schools can help build this drive into the students prior to their entry into the developmental experiences that the forums focus on.

The profession should use the forum as a link between the field and the school. The school can use the forum to communicate ideas and receive feedback on new doctrine quickly. The field can also receive feedback from the members at the school regarding potential solutions. While the forum should not be merely a means of communication between the school and the member in the field, all parts of the profession can benefit from an enhanced understanding of reality for the soldier.

Facilitation is also important. The Army must make an effort to ensure that qualified individuals focus on facilitating the professional forum. While the forums have been administered by volunteers up until now, the move to provide dedicated facilitation is a great improvement. The literature regarding self-directed learning and communities of practice both point to the need for qualified facilitators and administrators of these communities.

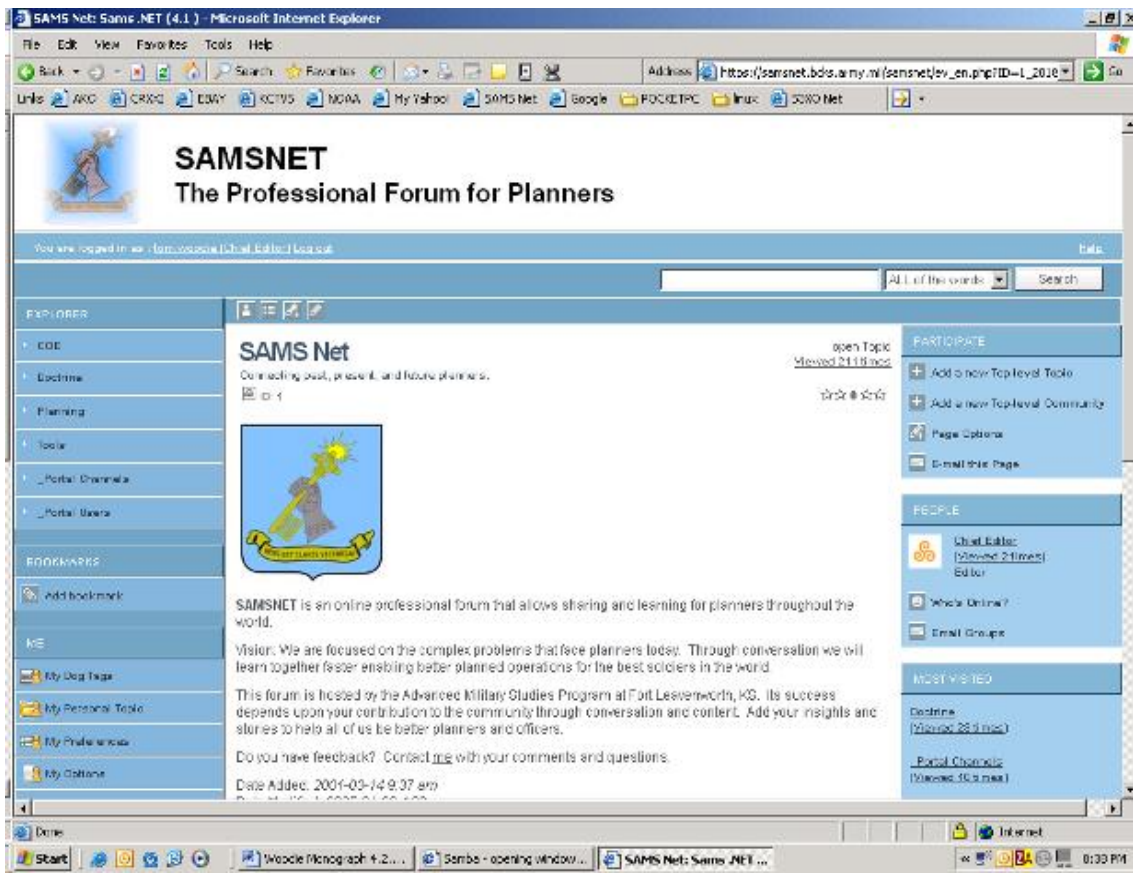
The use of facilitators is important for the self-directed component of the forum due to the greatly enhanced learning experience. The facilitator can bring additional persons to bear on a difficult problem. They can also ask questions or clarify things that will enhance the learning

experience of everyone. Additionally, they can serve as someone who can help ensure the quality of forum's content.

These facilitators must be resourced just as instructors are resourced. A full time facilitator must focus and prepare to understand the community and the members he or she serves. While both the instructor and facilitator serve vital roles, the professional forum facilitator can impact hundreds if not thousands of learners. This impact extends beyond the physical confines of any classroom, post, or theater.

## **Conclusion**

As a result of my faith in the power of the professional forum, I established a professional forum for the School of Advanced Military Studies and its graduates. This professional forum is a means for the graduates to communicate with each other and the current class regarding the difficult duties of the planner.



**Figure 2. SAMSNET**

The site focuses on the Army planner and the problems that he or she faces. This focus is especially important now due to the difficult circumstances the Army faces fighting on diverse and challenging battlefields. These duties require great amounts of knowledge from varied topics. The ability to communicate and share knowledge among the members is an integral part of the school and learned early in the course. The use of a professional forum to share ideas should serve as a natural continuation of the learning experience in the classroom.

The site continues the conversations started in the classroom but is more focused on the problems faced by the graduates in the conduct of their duties. Trust develops first in the classroom and halls of the school and carries into the forum. Due to the relatively small community, building trust and enhancing conversation should be relatively easy. The members

of the forum share a passion for learning that can benefit the site greatly. The forum has the foundation for a vibrant community that will serve the profession well.

The School of Advanced Military Studies administers the site. This allows the addition and introduction of each new class to the site. As the new members contribute to the conversation, the site will quickly build. The connections between the past, present, and future operational planners of the Army, Marines, Navy, and Air Force will benefit all the services and especially the Army. This forum will have the benefit of connecting every division and corps level unit to the school and each other.

The site, in “beta” format, received positive feedback. The members desire a place to share ideas and tools that allow a higher level of performance than otherwise possible. They also desire to maintain the connection with their current classmates. The positive feedback is encouraging and seems to indicate that a positive outcome is very likely.

The professional forum is a useful method to educate our profession. The self-directed nature of the forum and the ability to connect with members who have valuable experiences supports the problem-centered nature of the environment. The techniques in use by the existing forums and civilian corporations provide a useful means to communicate the knowledge and assist the professional in learning.

The Army profession is alive and well. We will see a manifestation of its dedication and drive in the contributions to professional forums. Learning from professional forums will improve Soldier skills. Soldier skills will improve units. They will gain more knowledge faster than ever before. Successful units, soldiers, and their experiences are a worthwhile focus.

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