



Canadian Centre for
Management Development

Centre canadien
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FOR ALL THOSE WHO BELIEVE IN EXCELLENCE • POUR CEUX ET CELLES QUI CROIENT EN L'EXCELLENCE

THE LEARNING JOURNEY

A GUIDE TO ACHIEVING EXCELLENCE

THE LEARNING ORGANIZATION

CCMD ROUNDTABLE
ON THE LEARNING
ORGANIZATION

CHAired BY
SAMY WATSON

BY PETER STOYKO

ACTION – RESEARCH
ROUNDTABLES

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A WORD FROM CCMD

The Public Service of Canada is evolving at an ever-quickening pace and research is needed to address the issues and challenges public servants face daily. In consultation with managers, CCMD identified four issues of immediate and critical concern and launched four Action-Research Roundtables:

- Implementation of the Social Union Framework Agreement (SUFA)
- Building the learning organization
- Managing horizontal issues
- Risk management

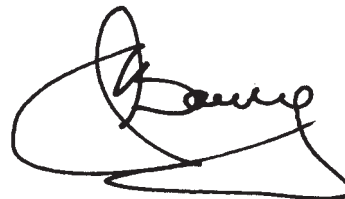
This report has been released by the Action-Research Roundtable on the Learning Organization. Its objectives were to take stock of what is known about learning organizations, to translate that information into practical guidance, and to develop approaches that will help managers transform their workplace into a continuous learning organization.

This document is the fulfillment of those objectives. It is a practical and valuable resource that has been specifically designed to be accessible and easy to read. I am confident it will prove beneficial to managers across the country. It will serve as an ideal complement to the two reports published in June 2000 by the Deputy Ministers' Committee on Learning and Development entitled *A Public Service Learning Organization: From Coast to Coast to Coast — Directions for the Future* and *A Policy Discussion Paper*.

It is also worth noting that, as part of its journey, the Roundtable developed a number of valuable working papers: a discussion document on organizational learning in the public service, and more specialized papers on knowledge management, learning tools, innovation, and approaches to private sector learning organization, as well as a collection of case studies. These documents are available on CCMD's Web site at www.ccmd-ccg.gc.ca.

Many people are responsible for the success of the Roundtable. Specifically, I would like to thank the Chair, Samy Watson, Deputy Minister of Agriculture, for his inspirational leadership on the Roundtable and for bringing the Roundtable's findings to life in his own organization. I would also like to recognize the immense contributions of the Roundtable members who volunteered their time and expertise because they believed in the importance of this project. Finally, I would like to thank the people who provided continuing support to this project: Geoff Dinsdale, coordinator of all the Roundtables, and the members of the Roundtable secretariat, Peter Stoyko and Anna Wheeler.

Jocelyne Bourgon

A handwritten signature in black ink, appearing to read 'J Bourgon', with a large, sweeping flourish underneath.

President
Canadian Centre for
Management Development

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The roundtable members would like to thank the many individuals who contributed to the development of this document. This includes resources persons, focus test participants, and the people that carried out the publication process. Their contributions helped ensure that this product will be useful to managers across Canada's Public Service.

WHAT IS THE PURPOSE OF THIS GUIDE?

This guide is about “organizational learning.” This term may strike you as odd, or even faddish. There is no denying that the term is often misunderstood. This is unfortunate because organizational learning is actually a set of simple, yet powerful, ideas to help you improve your effectiveness — in both the work you carry out and the results you achieve.

Organizational learning is, first and foremost, not just about training courses and learning retreats. It is about cultivating openness to ideas all the time — within you and those around you.

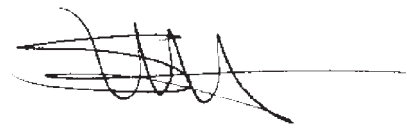
Organizational learning is also about making sure those ideas are rigorous and persuasive. To do this, we have to be willing to express our ideas even when they challenge conventional wisdom, or our co-workers strongly held beliefs. Ideas stand or fall based on their worth, not their origin in the hierarchy. So we need to do our homework to substantiate or refute ideas, and remain open to the ideas and comments of others.

The potential benefits are enormous. We become freed up from the needless busywork that can keep us from achieving our team and organizational objectives. Overall, we are better able to fulfill the core mission of the Public Service — to provide the best possible advice to ministers and service to Canadians.

A great deal of work, including work initiated by the Clerk of the Privy Council, has been undertaken to help transform the Public Service into a learning organization. Our Roundtable was established for the unique purpose of providing practical guidance to managers. This guide is the result of our work.

The members of the Roundtable included federal public servants and academics. I thank them for their invaluable contributions, as it was their openness, ideas, and commitment, along with the support of the Roundtable secretariat that made this guide possible. But be warned: within these pages you will not find a list of simple steps that you can skim through during your coffee break. There is no simple recipe. Building a learning organization is a difficult journey that requires ongoing effort — but the rewards are worth it. For those committed to this challenge, we feel confident that this guide will prove to be an invaluable resource.

Samy Watson

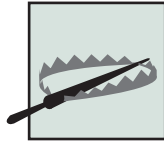


Chair, CCMD’s Roundtable on
the Learning Organization

ICONS THAT HIGHLIGHT KEY POINTS



Guiding Principles



Traps and Pitfalls



Tools and Tips



Things to Remember

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WHAT IS ORGANIZATIONAL LEARNING?

Ask Yourself a Few Questions

- Many public organizations do things well. But few organizations operate to their full potential and continually achieve truly excellent results. Can you say, with confidence, that your organization is truly great? How would you know?
- Many public managers recognize that learning is important to their personal and organizational performance. But where does learning figure in your daily life? Where *should* it figure in your life?

A Tale of Two Public Servants

Malcolm manages a small policy analysis team within the Public Service of Canada. Justine manages a much larger organization devoted to delivering services to citizens. Their very different experiences tell us a lot about learning and its importance.

The two colleagues meet occasionally to bounce ideas off each other. This time the conversation turned to unease about the way their organizations were evolving. Malcolm and Justine were both facing challenges, but they were having trouble putting their finger on the nature of the problem.

Malcolm's Story

Malcolm spoke first. By all accounts, his team runs efficiently and is well respected. On the surface, team members seem content with their jobs. Workloads are high and budgets are tight but, thankfully, the team meets its deadlines. No major crises to report.

This doesn't mean that Malcolm hasn't experienced a lot of frustrations. He has. More is expected of his team, despite fewer resources. It seems to take so much extra energy to stay on top of things. Other parts of the organization seem to be in a permanent state of gridlock, making it so difficult to get things done quickly.

No one in the system seems to want to take risks ... or relinquish control ... or lend a hand ... or experiment with new approaches to doing things.

When he first became manager, he had ambitious plans to explore new areas of policy and develop innovative policy options. He was confident that he could make a major contribution to the team's effectiveness. Despite a few modest improvements early on, the team has settled into a comfortable routine. Malcolm worries that the team's performance is mediocre in spite of its members' many talents.

There is good reason to worry.

This is not just because Malcolm's job is becoming more complex, or because his boss continually sets the bar higher. It's because he wonders whether he's losing sight of why he joined the Public Service in the first place — to serve the public good and make Canada a better place in which to live. He doesn't believe he's making a difference. He just seems to be going through the motions by pushing paper and attending meetings. And there just doesn't seem to be a lot of public appreciation for the work his team is doing.

WHAT IS ORGANIZATIONAL LEARNING?

So, what options are available to change the situation?

New fads are rolled out every once in a while that promise to make managers more effective. Or a new report hits Malcolm's desk promising substantial reform. These efforts seem well intentioned, but life is too short to read them over thoroughly. Besides, the changes proposed don't seem to trickle down to his team. There doesn't seem to be any follow-through. So Malcolm's team continues on as usual. At most, Malcolm memorizes a few buzzwords but doesn't really take it all to heart.

At this point in Malcolm's story, Justine intervenes. She suggests that "What options are available?" is the wrong question to ask. Malcolm should take the initiative himself, instead of waiting for a ready-made solution to fall into his lap.

This involves exercising some leadership, she explains. In fact, it requires that all members of his team exercise leadership. Learning requires self-improvement. The team then needs to come together and develop innovations as a group. In short, what is needed is a "learning organization."

Malcolm has heard this before. He is really quite interested in improving leadership and learning within his team. On the other hand, he also experienced some setbacks in trying to make it happen.

The team has had some early success at improving the way it learns. But it has had trouble repeating its successes and maintaining momentum. There doesn't seem to be enough time in the day to engage in meaningful learning. There isn't any support available. And if that isn't enough, some members of the team just seem to pay lip service to the notion of improving learning. Malcolm suspects that they don't really think this stuff works.

These are common complaints. They cause people to give up without making the extra effort. Let's face it, if leadership and learning were easy, then everyone would be good at them by now. It's important to understand that these complaints don't have to stop you. Most are actually learning opportunities in disguise.

Justine's Story

Justine doesn't need much convincing of the value of learning. She's read a few books on the subject, and has been to a few presentations on leadership and learning. She's quite conscientious about improving her organization, especially given all the pressure placed on service providers these days. Citizens expect more of their public services.

No, Justine's challenge isn't about a lack of interest in achieving excellence. Her biggest challenge is living up to her organization's past successes. But circumstances haven't been kind to her lately.

Her organization was one of the first to launch an extensive pilot project to improve services to citizens. The service delivery process was streamlined. Staff were sent on training courses. Many routine functions became automated using technology. Client satisfaction ratings shot through the roof.

“Organizational learning requires an on-going commitment, one that brings with it many rewards.”

WHAT IS ORGANIZATIONAL LEARNING?

Soon, everyone wanted to know more about how she achieved her successes. In fact, Justine became a bit of a celebrity. And this is where the trouble began.

The success had made her organization a little complacent. The hunger to improve had died down. After all, so much was accomplished in such a short period of time. Most of Justine's staff felt that there wasn't much left to learn ... and that they were a little exhausted. Everyone saw themselves as a learning organization, despite many missed opportunities to improve the way they work.

Justine was concerned. This wasn't the type of culture that encouraged innovation. Greater humility, open dialogue, and critical reflection were needed.

But that wasn't her only worry.

Most of her energies were devoted to improving the internal operation of her organization. She had lost sight of changes taking place outside of the organization's walls. She had to admit that she no longer knew the state-of-the-art within her area of service delivery. Client tastes were changing. She didn't know why. Justine's organization wasn't really equipped to scan for emerging threats and opportunities. Client satisfaction ratings dropped a notch or two.

When the organization tried to shift gears there was a reluctance to depart from the old approach. People couldn't explain why they thought this approach still applied. They just knew it had worked before. It was their set of "best practices."

Some people felt that any change would undo all their recent hard work and sacrifice. They took it personally. It was as if they had "ownership" over past innovations.

To add to this, a couple of Justine's best employees were lured away by other organizations. When they left, some of the organization's knowledge and experience went with them. Her knee-jerk reaction was to offer new recruits more training. This only went so far. Not only that, but there is only so much money available in the training budget to spare.

Even good organizations have their ups and downs. And when you're having your downs, there comes a time when you ask yourself: "Is all this trouble worth it?"

But the very best organizations treat their setbacks as a valuable source of lessons. They manage expectations. And then they adapt or rebuild. In the future, they're even better equipped to anticipate and prepare for dangers ... as well as to discover new opportunities.

Most importantly, all of this takes place without managers having to exert overbearing control. The organization should know what it has to do to achieve success and stay on top. There should be no "ownership" or turf to protect. This is what a learning organization is all about.

The ultimate goal is to enhance the learning in a comprehensive and a sustainable way. This guide offers some tips that will help you during your journey.

“The very best organizations treat their setbacks as a valuable source of lessons.”

WHAT IS ORGANIZATIONAL LEARNING?

Dispelling Some Myths About Learning



“Learning is not just about training, studying or technological fixes.”

Before we go any further, it’s necessary to dispel a few myths about what organizational learning is and what it is not. Some of the biggest barriers to improving learning are common misconceptions about what is involved in the first place.

Let’s start by looking at what it is *not*:

- *Learning is not just about training.* Training is a useful way of gaining new job-related skills. Learning is broader. It doesn’t just take place in a classroom. Learning is any activity that changes, for the better, the way we see the world, understand things, and act.
- *Learning is not a “parallel activity.”* Some people treat learning as something separate from their day-to-day lives. It’s treated as something done in our spare time. On the contrary, learning is most fulfilling when it is done all the time. Our work is a rich source of new lessons.
- *Learning is not just done by yourself.* Some think that it’s about isolating yourself so that you can study. It involves more than just reading and studying. In fact, learning most often takes place through relationships — teacher-student relationships. Or it takes place within groups of peers through a process of dialogue. We all play the roles of both teacher and student at one time or another.
- *There is no one best way to learn.* You can’t just set up a curriculum and expect that it will suit everyone. People have different learning styles. There are different ways people prefer to learn, or are inclined to learn. You have to understand your own learning style, as well as be sensitive to the learning styles of others around you.
- *There are no technological fixes to learning.* Electronic technologies help us do many things. But they are often over-sold as an easy way to make us learn better. There are no quick fixes to learning. Learning is something we work hard at to continually improve over our lifetime.

If you think about it, you spend a lot of your time learning without even recognizing it. However, we don’t usually make the most of the learning that we do. Nor do we channel that learning to improve the way an organization operates. We need to take charge and actively apply learning in our work lives.

What Learning Really Is About

Now, let’s take a look at what learning *is* about.

We usually think of learning as something done by individuals. So, how can an organization learn? First of all, organizational learning is not just the sum of the learning done by the individuals. It’s about the way people within an organization learn together to achieve a common objective.

This is an important point. Think about the ways in which you’d like people in your organization to share ideas and collaborate creatively. What would you ideally like to see?

WHAT IS ORGANIZATIONAL LEARNING?



“People need to look at their work as a rich source of discovery, invention, and high-energy collaboration.”

The answers to these questions suggest that cultural change is the top priority of most people.

When we are asked about our vision of an ideal learning organization, most of us say we want a change in organizational “attitude.” We’re tired of needless busywork, red tape, and boredom. We recognize that selfish careerism, command-and-control bossiness, and short-sighted quick fixes are poisonous to a team’s spirit.

Getting away from this is not simply a matter of reorganizing. It’s about getting people to look at their work as a rich source of discovery, invention and high-energy collaboration.

We want to engage in an open and candid dialogue. We want to speak our minds, free of fear. Ideally, diverse views are brought to the table and new ideas flow from the creative conflict. Everyone then becomes motivated to contribute and listen. Team members teach each other new things and support each other. A sense of community develops, guided by a shared vision, set of values and purpose. This is a true culture of learning.

And this starts by looking at knowledge differently and building new competencies.

We shouldn’t be content with conventional wisdom. Knowledge is almost always ambiguous and there is never enough of it. This means we have to actively inquire: Why did this work or fail? What makes me think the same thing will happen next time? How do others interpret this? Is this being done for worthwhile reasons? These are the types of questions people ask when they approach knowledge with humility and actively question the prevailing view.

Knowledge is the product of relationships, not just “deep thinking” done by individuals. An idea may be good, but if you can’t also persuade others that it’s good, then it’s not of much use. And an idea may be even better if you include input from a diverse group of team members.

Building knowledge with others requires new competencies. Interpersonal abilities make possible a meaningful dialogue with others. This helps us understand issues from several points of view and see interconnections. It also makes it more likely that a shared vision of the future will emerge.

All of this learning is done to achieve certain objectives.

These can be personal objectives, organizational objectives, or both. Learning shouldn’t be done simply for the sake of it, or just because your boss thinks it’s a good idea. Think about what you’d like to achieve. Then ask yourself what you need in order to get there. What needs to be understood? How must current practices change? What abilities are required? Who can help make this work?

This might all seem easier said than done. Yes, you bet it is. It requires commitment and a motivation within ourselves to achieve. But it’s not as if public servants like ourselves can just sit back and be content with our current routines. Here’s why ...

“Organizational learning is about training to be an Olympic athlete, not just training to be physically fit.”

WHAT IS ORGANIZATIONAL LEARNING?

The 21st Century Will Be Led by Those Who Learn Best

This might sound like a familiar phrase. Everything written these days seems to start by saying how the world is moving faster ... how it's more complex ... how the old rules just don't apply. Before you skip this section, thinking you've heard it all before, stop to think about a few things.

New technologies are taking away the ability to control information. It's increasingly difficult to stop "leaks," or limit access to information about your organization. Citizens have more direct access than ever to public sector information. And they are free to interpret it as they see fit. Thus, we need to be able to craft persuasive messages that appeal to diverse audiences and produce a deep understanding.

Citizens see business as improving the relevance of their goods and services. We now expect highly relevant public services, too. Yet, Canada is a country with diverse people who hold ever-changing preferences and views. This is not just about inclusiveness. Diversity is a rich source of advantage that can be leveraged.

Simply reacting to trends leaves an organization vulnerable to crises. We need to anticipate, frame and drive trends for the sake of the public good.

Private companies realize this and are actively investing in learning. In a way, companies are acting more like public organizations these days. They realize that they have to be increasingly accountable for how they act. They make proactive investments in the way their organizations learn to manage risk and seize opportunity. These are forward-looking steps that go beyond a firm's quarterly results.

Ask yourself a few simple questions about how prepared you and your organization are.

- What value does your organization bring to citizens?
- What makes you think others are fully satisfied with their experiences with your organization? What are you doing to continually improve? What makes you think that's good enough?
- How certain are you that you can meet or exceed the commitments you've made to superiors? Is meeting these expectations enough?
- Do you know the state-of-the-art within your field of expertise and your organization's field of activity? What are the best ideas offered? How can you improve upon these ideas?
- How fast can your organization respond to change? More importantly, what is being done to anticipate and drive change to fulfill the public good?

Few of us are satisfied with the answers to these questions. This is not entirely a bad thing because the first step towards improving learning is to never be content with the present. This is what continuous learning is all about. It's about always striving to improve.

WHAT IS ORGANIZATIONAL LEARNING?

If You Are Up to the Challenge, This Guide Will Help You

This guide does not pretend to have all the answers. No serious learning guide would. This is because it is ultimately up to you to reflect on how you learn and make improvements that are specific to your situation.

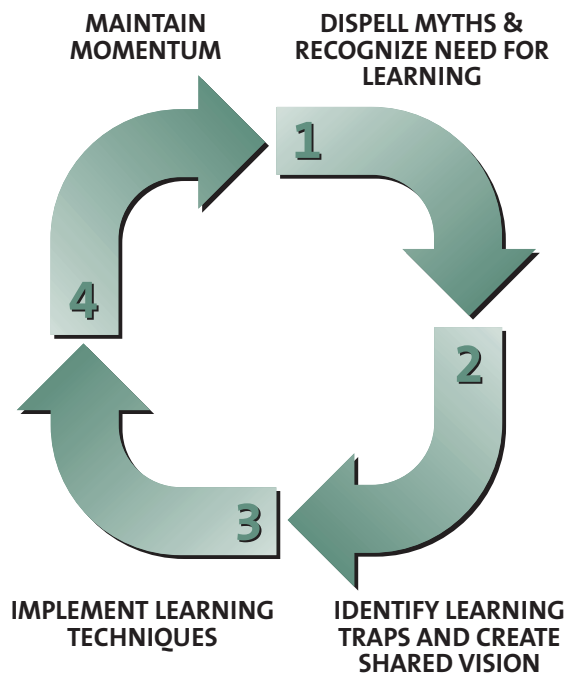
This guide will, on the other hand, provide you with some pointers about how to get started. More importantly, this guide will help your team get started. Remember, learning takes place through relationships. You can't take on the whole burden for improvement yourself. The lessons contained in this guide should be actively shared and discussed with your teammates. This is a guide to be read by your team.

So far, we've dispelled a few myths associated with learning and explained why learning is so urgently needed. Each of the following sections of the guide is devoted to another step along this learning journey.

The next step involves identifying the learning traps that are holding you and your organization back. It also shows you how a shared vision can emerge. You will then be shown a set of techniques that can make an immediate difference in the way your organization learns. The final step is to reflect on what you've done and maintain momentum. Each step takes place repeatedly, for the learning journey is one without an end point.

The guide will conclude with an example that illustrates how all this works in practice.

Steps Along The Learning Journey



HOW DO I FIGURE OUT WHERE TO START?

Keep a Few Things in Mind



- Personal learning is the lifelong pursuit of excellence. This is something that we can work to improve every day as part of our ongoing work lives.
- A learning organization emerges out of cultural change — a change in the organization’s “attitude.”
- Everyone in an organization needs to exercise leadership if profound and lasting cultural change is to take place.
- Knowledge is built through relationships. Knowledge needs to be crafted into persuasive messages that appeal to diverse audiences. It needs to be constantly scrutinized.
- New interpersonal abilities allow people to thrive in a more diverse, less hierarchical, knowledge-based organization.

Ask Yourself a Few Questions

- Every organization faces certain learning challenges — things that prevent it from learning to its full potential. A learning organization is one in which all members understand these challenges and strive to overcome them. Which challenges does your organization face? Are these widely understood?
- Many organizations have a vision statement. But a learning organization doesn't just have a statement. It has members with a deep and passionate vision of what they stand for and how they want to work. Can you say that the members of your organization share such a vision? If so, what is it?

Looking at Your Organization in a Fresh Way

These are difficult questions to answer because they can't be answered by a manager alone. These questions have to be answered by your organization collectively.

To understand why this is so, picture your organization as a volleyball team.

This is a good analogy because, unlike a sport like hockey, volleyball does not involve set roles. Everyone has an opportunity to play every position. This is not a sport involving specialized skills. Players need diversified skills. There are no celebrity goal scorers. Everyone pitches in to keep the volleys going.

This is how a team-based learning organization should ideally operate. So how do you coach such a team?

Your goal is to be the best volleyball team on the court. But you're not quite sure how your team really ranks. Basic statistics about points scored and games won don't tell the whole story. As a coach, you have to look deeper into your team's actions and performance.

So, what are you looking for?

Some coaches might start by looking at what each player is doing as an individual. Each player has the potential to block more quickly, or spike the ball more accurately. But it's not as simple as showing the person the "best" way of doing things. Some players have adopted bad habits. Others might not be performing to their full potential because of hidden difficulties. The challenge is to identify those things that are preventing a player from performing at her or his full potential.

A team may be filled with all-star players. But having great players and being a great team are two different things. A team needs to work well as a group.

As a coach, it is your job to find out where the team is having difficulties working together. You may be able to see things that might escape a team member's attention. Are they volleying to each other well? How well do they communicate with each other on the court? Is there camaraderie within the team in the locker room? Here the challenge is finding those things that are holding the team back as a group.

HOW DO I FIGURE OUT WHERE TO START?



“Good teams understand their shortcomings and share a vision of what they want to be.”

Before the team can start making changes, it has to have some sort of idea about the kind of team the members want to be. Does the team want to emphasize offence by trying to score goals aggressively? Or does the team want to be more defensive, being more calculating in its offensive plays? How can the team operate to make the best use of the players’ talents? How can everyone be included in important decisions facing the team? The team needs to develop a vision about what it will look like.

To sum up all this, good teams have a sober understanding of where they are and where they want to be.

That is why learning must involve a new way of seeing an organization. We need to diagnose those things that are holding an organization back. Then, we need to create a vision of the type of learning organization we want to work in. Only then can we begin to close the gap between the two.

Your job as a coach is to facilitate the process. But let’s be clear about the type of leadership that is involved here.

Most people have an image of a coach as someone who stands on the sidelines, barking orders at the players. This type of leadership will not likely get you anywhere. At best, players will comply with orders for as long as they are barked at. But this doesn’t have anything to do with learning.

The members of your team have to come to a collective realization of their current shortcomings and aspirations for the future. Unless everyone has an opportunity to provide input and shape the team’s vision, team members aren’t likely to be motivated to help improve the team. You can’t just impose a diagnosis on the team. Team members must see the diagnosis as their own.

Most people also see a coach as the one with all the answers. This is not so.

Sometimes only players are in a position to assess their situation. In these cases, coaches are reliant on the players for knowledge. Team members need to come to their own understanding of where they could make improvements. In other cases, insights come from seeing what other teams are doing ... or other coaches ... or players in other leagues and sports. Here, learning is about “stealing” good ideas shamelessly and applying them in clever ways.

All of this demands some dialogue and facilitation abilities. It also demands some pointers about what to look for. That’s what this section of the guide will help you with.

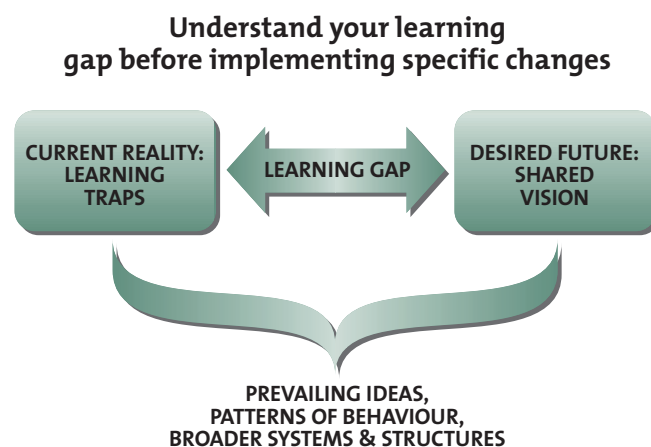
HOW DO I FIGURE OUT WHERE TO START?

What Types of Things Should We Look For?

Learning challenges take many forms. Here are the types of things you should be looking for:

- *Prevailing ideas:* Certain beliefs and assumptions may get in the way of learning. We often hold strong views about the best way of doing things, or preconceptions about the motives of others. Sometimes this prevents us from seeing the bigger picture. Or it may prevent us from taking a clear and candid look at a situation. We need to constantly scrutinize our current way of seeing things. Otherwise, a true openness to new ideas and curiosity to discover are missing.
- *Patterns of behaviour:* We have routine ways of doing things or interacting with others. We might respond to others in a way that makes them unwilling to be forthcoming. There are ways of doing things that may seem comfortable or convenient, causing us to not look for improvements. We may have habits that irritate others or make them nervous. These patterns of behaviour undermine collective learning unless we are aware of them ... and aware of how they are perceived by others.
- *Broader systems and structures:* Finally, there may be broader systemic issues that run counter to learning. Incentives may discourage team learning and, instead, encourage quick fixes and careerism. An organization may not value learning enough to offer the necessary resources and supports. It is important to recognize that broader systems and structures should always bring out the best in you and your team.

It is important to be alert to the ways each of these areas affects learning in your organization. What you're looking for are traps that prevent individuals and teams from drawing the full benefits of learning. Then, the team should outline their vision for the future with respect to each of these areas.

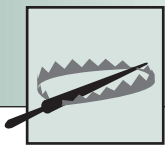
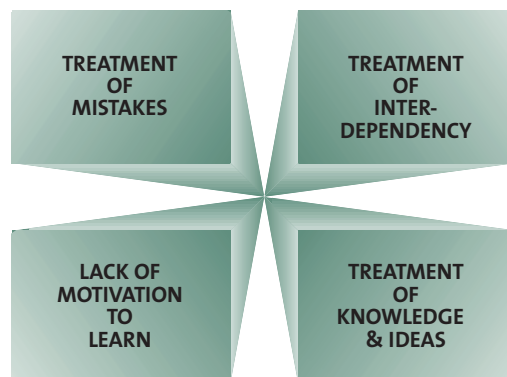


HOW DO I FIGURE OUT WHERE TO START?

Common Traps That Undermine Learning

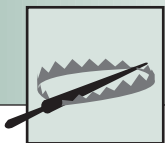
You may be wondering what learning traps look like. As we look at some common traps, ask yourself and your team to find examples of these within their own experiences. Even better, ask your team if there are traps that are missing from the following checklist. As you work through this process, make a list of the traps you identify.

Different Types of Learning Traps



- *How are mistakes treated in your team?* Mistakes will happen from time to time. If your team strives for excellence, it will not let minor setbacks cause it to fail. Teammates will lend a hand to compensate. The group will get to the root of the problem through discussion so that mistakes are less likely to happen again. Does your team have a mature approach to drawing lessons from mistakes? Here are some common learning traps related to learning from mistakes:
 - ◇ *Mistakes are not discussible.* When someone makes a mistake, we just assume that they learn from it and do not discuss it openly. When the team makes a mistake, we sometimes have a post-mortem meeting, but that is about all. And when the supervisor makes a mistake, no one acknowledges it, including the supervisor. People are more worried about creating unproductive tension and resentment.
 - ◇ *Team members avoid blame for mistakes.* Supervisors and co-workers express dissatisfaction when mistakes are made. There is a lot of pressure not to make errors. Everyone recognizes when mistakes are made, but the tendency is to avoid blame and criticize others for erring.
 - ◇ *Mistakes are buried.* There is a fear that mistakes will hurt a person's career or the team's reputation. Mistakes tend to be covered up, or treated as unimportant. These mistakes sometimes build up and create a crisis later on. Or they surface later and become an irritant.
 - ◇ *Mistakes are discussed, but no one gets to the root cause.* Mistakes are discussed, but they seem to happen again. This makes everyone frustrated. There is a tendency to not see when mistakes are just symptoms of deeper problems. No one wants to take the time to delve deeper and discover the root causes of mistakes.

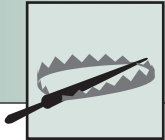
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- *Do team members recognize how their actions relate to the organization as a whole?* Organizations are increasingly interdependent. When someone does something, it usually has consequences for teammates. It can also affect people in other units and departments, even distant ones. If your team has a sense of interconnectedness, then it will understand how its work affects others. More importantly, the team will be able to situate itself within the system as a whole. To what extent does your team take advantage of this web of relationships? Some common learning traps related to interconnectedness include:
 - ◇ *We don't consider the full consequences of our actions.* Team members will often do things that add to others' work burden. At best, a heads-up warning is issued. More often, work builds up. There is a sense that team members don't appreciate how dependent they are on others. This creates tension and people avoid doing favours for others. No one comes together to work out mutually fulfilling arrangements that improve the way everyone does their job.
 - ◇ *Team members defend their turf.* Responsibilities are treated as watertight compartments with little overlap. So when a team member ventures into another's territory, he or she is rebuffed. Or complaints are made. Or barriers are erected. Even when the need for collaboration is recognized, there is a tendency to set strict parameters around people's involvement. More fluid work relationships are not valued.
 - ◇ *Things that affect other units and organizations are not my problem.* There is a recognition that managing horizontal relationships is important. Members may participate on joint committees and share information. But relationships with other units and organizations are treated more like a chore. When the team's activities have implications for others, it tends to manage the fallout instead of proactively looking for shared opportunities. There is little sense of common purpose or shared responsibility.
 - ◇ *Supervisors delegate, but keep a short leash.* There may not be any micromanagement, but managers set constraints that prevent team members from really "running with the ball." As a result, team members don't feel that they have enough autonomy to really innovate. Supervisors seem afraid to provide autonomy because they are worried about loss of control, especially amid crises. They also worry that they will be less relevant to their organization. They have always thought that being a manager involves constantly exercising authority over a team.
 - ◇ *Collective problem solving does not take place.* Sure, there are meetings. However, no one comes to the table looking for meaningful input from others. Meetings are usually limited to setting the agenda, delegating work, and approving work that has been done. The team has diverse talents. Only on rare occasions will someone ask others to be involved in their work. This happens only when someone gets stuck with a tricky problem. There are no work arrangements conducive to joint participation except for these occasional and less candid meetings.

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- ◇ *No one knows where he or she fits into the whole system.* Our goal is to serve Canadians. This is understood. But no one in the team can actually situate themselves within this enterprise. They can't see how their work relates to improving the lives of Canadians and making our democracy flourish. This makes it difficult to articulate how the team makes a contribution beyond vague generalities.

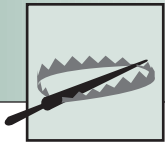


- *How motivated is your team to learn together?* The incentives that drive an organization can encourage and discourage learning. A learning organization does more than align incentives towards improving learning. It takes advantage of people's intrinsic motivation to learn — their interests, their natural curiosity, and their desire for personal mastery. How does your organization encourage people to learn, both individually and as a group? Take a look at the following motivational traps:
 - ◇ *There is little collective accountability.* Even when work is done by the whole team, there is a rigid hierarchy of accountability focused on the performance of individuals. Individuals answer for the achievement of personal goals, regardless of how their team performs. That's the basis on which bonuses and rewards are given out. As a result, people don't have much incentive to invest time and energy helping the team move forward. At most, the supervisor occasionally compliments us as a team.
 - ◇ *Incentives are based solely on material inducements.* When things are done well, then rewards are dispensed in the form of bonuses and awards. Sometimes team members don't feel that these are given out fairly. There is also frustration that such material inducements are the only incentives available. There hasn't been a concerted effort made to break down barriers that hinder work and prevent improvements to work. Team members also have talents and interests that could be leveraged to achieve great things, but no one seems interested in finding out what they are.
 - ◇ *The team is too inwardly focused.* It isn't on the lookout, continually scanning for emerging threats and opportunities. The team may be doing well by its own standards. But there is no understanding of the prevailing state-of-the-art. Nor is there much attention to how the ever-changing environment can affect the way things are done. By the time people recognize the need for change, they are in catch-up mode. There isn't any path-breaking taking place.
 - ◇ *All the team seems to do is fight fires.* A great deal of time is spent reacting to crises instead of preventing them in the first place. Skilled crisis managers are valued by the organization. But no one seems to recognize the value of those who work hard to avoid crises in the first place. This is somewhat understandable, since managing crises is highly visible. Crises that are avoided are not visible events. This means less time and energy are devoted to systematically anticipating and preparing for challenges, as well as looking for lessons from crises that take place.
 - ◇ *Everyone is encouraged to work harder, not work smarter.* Team members are evaluated based on their ability to "do their jobs," not discovering new ways of achieving the same objectives. Sometimes, small

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incremental improvements to work can be made. There are too many hurdles put in the way of making more meaningful changes to the way work is done. Moreover, you're more likely to be chastised for creating headaches in the short term than rewarded for making enduring improvements.

- ◇ *Learning is treated as something done on "our own time."* Teammates harbour a misconception about what learning involves. They just assume that it is something separate from work. Time spent growing intellectually and improving the way work is performed are not valued. Learning is not seen as part of "real" work.



- *How does your team treat knowledge and ideas?* Organizations are increasingly dependent on knowledge, but not just any knowledge. Knowledge needs to be continually scrutinized. It needs to be challenged by team members and shaped into persuasive arguments. The quality and relevance of knowledge needs to be determined in a rigorous way. Not all organizations have the "safe space" necessary to openly debate the merits of a policy proposal, research report, or presentation. To what extent does your organization actively assess the knowledge it uses? Here are several idea traps:
 - ◇ *The boss's opinion is law.* Ideas are discussed, sometimes vigorously. When the boss speaks, the debate is over. People are worried that if they challenge the views of supervisors, they are putting their careers in peril. They think that supervisors will lose face or will get angry. A supervisor may say that he or she doesn't have all the answers. But offering alternative views just seems like challenging their authority.
 - ◇ *If you can't measure it, then it's not important.* Everyone recognizes that you should be able to back up your actions with evidence. But one form of evidence tends to preoccupy the team — numbers. While measuring team performance is important for ensuring accountability, the team treats it as an end in itself. So views that aren't backed up with numbers are seen as less rigorous. Views that are supported with statistics are prized, especially because they can be put into a deck presentation and easily shown to others. As a result, a lot of important information escapes attention.
 - ◇ *When ideas are discussed, the goal is to debate opponents into submission.* Yes, everyone needs to advocate a position at times. But when the team gets together to discuss ideas, it isn't done with open minds and candour. Actually, no one seems to really listen or share. Discussion revolves around convincing others of your point of view. It's all about selling ideas, not creating them.
 - ◇ *Discussions are where members vent their complaints, but don't act on them.* Team members have grievances and irritants that they want to get off their chest. When they have an opportunity to engage in open dialogue, they use it to complain. Supervisors feel uncomfortable and ask the group to be more constructive. Those making complaints,

" Ideas should stand or fall based on their worth, not their origin in the hierarchy."

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on the other hand, feel that they are being constructive. Everyone just seems to have difficulties expressing what they want in a way that doesn't make others feel threatened. As a result, these opportunities to make improvements are wasted.

- ◇ *Our successes prevent us from looking for ways to improve.* The organization has had a number of successes. It's even received awards. Instead of making everyone open to new ideas, success has made everyone complacent. Ideas that depart from the current path are usually ignored. The group motto seems to be: "If it ain't broke, don't fix it." This means that people can't explain why they think current practices will work in the future. Since circumstances change so rapidly, there is a need to be more vigilant. But the team remains conservative, a victim of its success and reputation.
- ◇ *Everyone is of like mind.* The team values consensus. But instead of engaging in deep dialogue to resolve conflicts, the team is populated with people who think the same way. New members are carefully screened to make sure that they are "on board" with the team's message, or "fit in" to the way things are done. Opposition to the majority view is considered troublemaking. "Buying in" is considered more important. But this tends to be a false consensus. There is no diversity of views or creative conflict. Members of different functions, cultural backgrounds, or organizations are not present.
- ◇ *New ideas are not taken seriously.* The team encourages members to offer new ideas. They even state that they want ideas drawn from diverse sources. When they are offered, however, they are labelled as silly, or "undoable." Sometimes shooting down new ideas is done a little more subtly. People will make jokes or snide comments. Even a smirk, a gesture, or a chuckle can signal disinterest. Team members aren't aware of the many little ways they discourage others. As a result, ideas are dismissed without careful consideration.

The chances are that you've experienced many of these traps, or variations of them. The traps can sometimes be less obvious than they are portrayed here.

Developing awareness of such traps is crucial to your organization's learning development. This requires a mature capacity to reflect on the way you do things. It is not enough to see these traps created by others. We can inadvertently contribute to them without even knowing it.

Everyone in your team also needs to understand their role in creating and maintaining learning traps. They can't just be told. Ask yourself how you'd respond to someone telling you that you are holding back the team's learning. No matter how diplomatically it is put, it is likely going to be interpreted as assigning blame.

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A team's learning traps must be diagnosed collectively. This begs the obvious question: How can such a diagnosis take place? Ask your team to consider the following questions:

- How have I contributed to creating or maintaining learning traps? Provide examples. What could I do differently to create a culture that is more open to learning?
- What are your frustrations with learning traps in your work? Provide examples. How can team members help?
- What traps are missing from this list?

Your team should now have a list of the learning traps they face. This will provide an image of where the team currently stands in its pursuit of learning.

Developing a Shared Vision

You've looked at your organization's current difficulties. Now's the time to look at what you want to achieve in the future. This is about creating a shared vision within your organization.

What exactly is a vision and how is it shared?

Simply put, a vision is an image of the ideal future that you want to create. It isn't just a statement of lofty principles. It must be an image that speaks to the day-to-day realities that people face in their work. It also isn't something set in stone. The vision must be flexible enough to change as the work evolves and people learn more. Finally, a vision can't be stipulated by a manager. The vision must be developed in collaboration with everyone in the unit.

So what precisely does a vision contain?

At the very least, it contains a general picture of what you'd like to achieve as an organization in concrete terms. But it also involves being clear about the values, beliefs and principles that your group cherishes. These should be the values that guide the way your team works. Finally, it's the image that you'd like to portray to others. Think about what your team should stand for in the minds of citizens.¹

There are many useful tools for creating visions or vision statements. This guide proposes a relatively simple and straightforward approach.

Your organization should list its primary objectives. This isn't just those "mission critical" goals or key "business lines," although you should be conscious of the organization's mandate. But a vision incorporates a broader array of learning considerations.

If your organization is a small team, this can be done through a special event or a dialogue that takes place over a period of time. If the organization is large, then the consulting process becomes more elaborate. In this guide, we assume that you are starting with your local team.

“A vision speaks to a team's day-to-day realities, is flexible enough to evolve and is developed through collaboration.”

HOW DO I FIGURE OUT WHERE TO START?



On a sheet of paper or an easel pad, list your group's answers to the following questions:

- *How would you see your team as contributing to the public good?* This should include some idea about:
 - Who are the key stakeholders that you serve? What is the spirit of your organization's mandate? You may have more immediate client groups, but whom, ultimately, are you serving? How does your team help them?
 - How is this different from other public sector organizations?
 - How does your team help other organizations accomplish their goals?
- *What do you picture as the ideal workplace?* If you need help answering this question, ask yourself a few additional things:
 - How would people interact as a group to solve problems? What work arrangements would be involved? How would people lead and contribute?
 - How can you work together to overcome learning traps experienced by the team?
 - How would this workplace invest in your intellectual development, both personally and professionally?
 - How would this workplace balance your work, family and friendship obligations?

The answers to these questions should tell you something about how you view your local work environment. It should also say something about how the local environment fits within the broader scheme of things. They should be personal statements.

Eventually, you want a more concise image that captures the essence of what you would like to accomplish as a group. This doesn't have to be just a statement. On the other hand, it should be concise enough for members to be able to know it by heart.

Bryan Smith has extensive experience helping organizations develop shared vision. He recommends several principles that should guide the process to ensure that everyone is included.² These include:

- Start with the personal and discuss how it relates to what the organization wants to achieve.
- Treat everyone as equals and don't let hierarchy intrude on your deliberations.
- Seek alignment, not agreement. You're not looking for conformity. Nor do you want to ignore differences simply to seek agreement. Look for points of alignment beneath disagreements between people.

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- Encourage interdependence and diversity. Look at how your vision relates to those of others and recognize how people are different.
- Avoid “sampling” and adding up the results. Instead, look to creating a vision together through discussion.
- Have people speak only for themselves. Try not to second-guess what others will say. Do not assume you speak for others. Therefore, members should not start by trying to articulate the vision by themselves. Instead, they should speak on their own behalf and look for points of alignment later in the process.

By following these steps and principles, you are more likely to create a vision that everyone will share.

By the end of this exercise, you should have an idea of where you are now and where you want to be in the future. You have a list of learning traps experienced by your team. You also have an image of where you want to go.

It is now time to reflect on the gap between your current situation and your vision of the future. Ask yourself what steps can be taken to get you to your destination.

This is a challenging step. If you are having difficulties figuring out what to do, the next section is devoted to helping you out.

Some Things to Keep in Mind



- Managing involves helping everyone develop a keen understanding of an organization’s strengths and weaknesses, as well as emerging threats and opportunities.
- A learning organization needs a shared vision that everyone can see themselves in. It’s a vision that represents everyone’s aspirations and cherished values.
- It is important to continually scrutinize prevailing beliefs and assumptions, patterns of behaviour, and broader systems and structures.
- Teams — even good teams — fall into learning traps that must be understood and overcome.
- Particularly problematic learning traps relate to the way we treat mistakes, relationships, motivation, and knowledge and ideas.

Notes

1. Douglas Eadie, "Putting Vision to Powerful Use in Your Organization," *Nonprofit World* 13 (4, 1995): 40–46.
2. Bryan Smith, "Building Shared Vision: How to Begin," in Peter Senge, Richard Ross, Bryan Smith, Charlotte Roberts, and Art Kleiner, *The Fifth Discipline Fieldbook* (Toronto: Currency Doubleday, 1994), pp. 323–26.

Ask Yourself a Few Questions

- Personal self-improvement requires an honest and systematic assessment of yourself. It also requires investments in your own personal and professional development. What investments have you made in yourself and your staff? How often do you assess yourself?
- When you work with your team, what techniques have you employed to improve the way the group interacts? Or do you expect that the way the team interacts is beyond your control?
- When you make improvements in the way your team operates, how do you help others outside your team benefit? What is done to diffuse lessons learned? What is done to help the broader organization improve its capacity to learn?

Creating Leadership at Every Level

It's one thing to diagnose learning in your organization, it's quite another to turn that diagnosis into an agenda for change.

And it's here that many well-intentioned leaders stumble.

In the rush to promote learning, we often set unrealistic expectations of the results we intend to achieve. Reasonable milestones need to be set. You can't let yourself get carried away by hype. You're not a missionary trying to "convert the unenlightened." Fads come and go so quickly because advocates take this attitude towards change. All this ends up building is cynicism.

If you're in it for the long haul, you should be prepared to deal with seemingly intractable problems that take time to change. You might be thinking: "Wait a minute! I have to show others the progress I've made ... not next year, not next month, but tomorrow."

There are several steps that can be taken immediately. These techniques can be continually improved over time. The steps aren't just tinkering, however. They are part of a systematic change process that proceeds on several fronts.

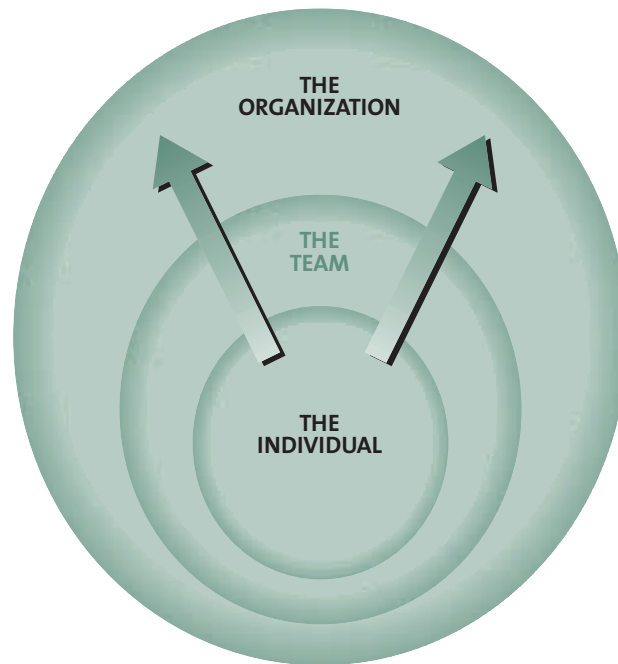
- *The first front is self-improvement by the individual.* An investment needs to be made in your personal and professional development as well as in that of your teammates. Organizations can be held back by the one person who doesn't have the right competencies or an interest in personal mastery.
- *Improving the way your team innovates is the second front.* There are several techniques that can be used to get your team working actively on improving the way it works.
- If you're able to improve the way your team works, then good for you. But your team doesn't work in isolation, does it? *So the third front is implementing techniques to help generate learning among your partners outside the team.* In turn, you can also draw lessons from your outside partners. These are techniques that help you generate learning elsewhere.



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You can think of these fronts as concentric circles. Different tactics are required to improve learning as you attempt to promote learning further afield. Ideally, lessons learned within one circle should help you in the next.

Change starts with the individual and moves out from there.



“ Learning tips must be applied with some cleverness. They’re not ready-made solutions.”

The following techniques can’t simply be adopted. They must be applied with some cleverness. These are tips, not ready-made solutions. And remember, all of these techniques are focused on overcoming learning traps and moving you further towards your ideal vision.

Individual Learning Techniques



An organization can learn only if it is composed of individuals with a strong commitment to personal learning and self-improvement. What precisely does this involve?

First, this commitment requires a strong curiosity and willingness to inquire and discover. It also involves having an ability to reflect on one’s learning and look for new ways to do things better.

Many managers will look at their staff and single out those people who possess these characteristics. This would be a mistake. All of us have this intrinsic motivation to learn. But we don’t all feel comfortable learning in the same way.

- *We all prefer particular approaches to formal learning.* Some of us prefer to learn by reading, while others prefer lectures and presentations. Still others learn best through conversation, or using multimedia applications. It is

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important to be aware of these learning styles and seek out learning opportunities that make the most of them.

- *We also have differences in the way we prefer to think about things.* Psychologists call these “cognitive styles.” This is a fancy way of saying that we all have preferred ways of receiving information and ordering it in our minds. Some of us prefer information presented in a logical sequence using clear terminology. Others feel constrained by this kind of approach. They instead feel more comfortable with abstract ideas and more visual ways of understanding things.
- *Everyone has preferences about when and where they learn.* Environment can be important. Some people prefer the energetic buzz of a busy office. Others need a quiet place to gather thoughts. Different times of the day can also be more or less conducive to different types of learning. We need to be sensitive to the way our energy levels fluctuate throughout the day.

As a learner, you should be sensitive to your own styles. As a manager and team member, you should be sensitive to the styles of others.

Learning styles say something about improving how we learn. But they don't tell us what characteristics help make our organizations learn better. This is where the notion of competencies comes in. Competencies are identifiable characteristics of individuals that underlie effective performance and behaviour.

The key question raised by competencies is: “What competencies do we need to actively develop as individuals in order to improve the way a group learns?”

There is no comprehensive answer to this question. It often depends on the group and its dynamics. This said, it is clear that certain competencies are of crucial importance.

- ◇ *A cosmopolitan world view enables us to take the wider view of issues.* It involves awareness, understanding and appreciation of diversity. This diversity comes in many forms. It can be diversity of ideologies, experiences, perspectives, cultural heritages, lifestyles, and occupational function.
- ◇ *We need to be able to learn more creatively and on a continuous basis.* There is a need for flexible thinking and the ability to integrate information from diverse sources. Reflection needs to take place on a continual basis. These require the development of new analytical abilities.
- ◇ *There is a need for interpersonal characteristics that promote collaboration, mutual respect, and selflessness.* We need to see new opportunities to build on each other's ideas and personal strengths. This includes the ability to read a team's dynamics. When part of a team falters, we should know how to pull things together to further team objectives.
- ◇ *Teaching is about a sharing relationship that generates curiosity, supports inquiry, and provides guidance necessary to give ideas rigour.* This is more

“ We all have preferred ways of learning. Understanding these learning styles, in ourselves and in others, helps us learn more effectively.”

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than just communication skills. It's about seeing the underlying potential in others and then cultivating those talents.

- ◇ *We need to be able to envision ourselves within a broader context, see interconnections, and think about the future.* It involves reflecting on the environment and providing a vision to guide others. This allows us to see our life and work as part of a larger whole.
- ◇ *We need to develop the interpersonal skills that help us interact and share with others.* This needs to be done in a respectful, appreciative and meaningful fashion. This includes the ability to apply conflict constructively, without feeling threatened.
- ◇ *Finally, we need the analytical abilities to clarify, organize, analyze and judge knowledge.* This is what it means to be sophisticated thinkers and effective problem solvers.

These competencies are required to be successful in a workplace without rigid rules and hierarchy.

All members of a team should make an effort to assess themselves and grow intellectually within each of these areas. This can be accomplished by first drawing up a learning plan with a set of competency development objectives. Then individuals can track their progress over time, reporting periodically on their progress.

Team Learning Techniques



There are several techniques specifically designed to help teams overcome learning traps. The following are a few of the most prominent examples.

Team Tip # 1 — Generating Mutually Fulfilling Dialogue

There is a lot of talk recently about the virtues of using dialogue to promote awareness, understanding and commitment. In a way, dialogue helps a group of people “think together.” Everyone engages in a candid, respectful and honest conversation about a subject that really matters. Individuals listen carefully and ideas are discussed openly.

That is what true dialogue is all about.

Yes, there is much agreement about the value of dialogue. But no, there aren't many tips circulating about how to orchestrate a successful dialogue. In fact, until now, this guide has been vague about this subject.

The knee-jerk impulse is to hire a professional dialogue facilitator. This may help. However, there is also a risk of becoming dependent on outside help to “referee” your discussions. The team needs to develop its own dialogue capacity. Besides, who has the money to hire expensive facilitators all the time. Dialogue shouldn't just happen on special occasions.

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William Isaacs and Palmer Parker have done extensive research into the way dialogue takes place.¹ Together, they have several important insights to offer:

- ◇ *Dialogue isn't about beating down opposing views through debate.* Sure, advocacy plays a crucial role. Overbearing advocacy and monologues, however, can shut down shared inquiry. To prevent this, recognize that you are simply seeing things from a particular point of view. Tell others the steps that you've taken to arrive at that point of view. Make your interpretations and expectations explicit. Offer concrete examples to illustrate your point.
- ◇ *Inquiry signals a willingness to gain new insights, but sometimes the hidden intention is to sell an idea or give advice.* This happens when you ask a question with the expectation of getting a specific answer. Or it happens when statements are disguised as questions. Instead, actively probe other's thinking and assumptions. Ask for further clarification if the full chain of logic is not evident.
- ◇ *Dialogue requires a balance between different roles.* There is a need for some people to advocate positions and move the discussion in a particular direction. Others should offer opposing points of view to scrutinize arguments and offer corrections. There is also a need for individuals who stay on the sidelines to periodically offer an alternative perspective. Finally, there is a need for individuals who distil key lessons to help bring the dialogue to completion. When one of these roles is absent, you should step in and fill that role. You should also encourage others to do the same. Without these roles, a dialogue can get stuck.
- ◇ *Dialogue requires a balance between different practices.* At times, it is important to suspend assumptions and ways of seeing things that are taken for granted. An alternative point of view should be adopted. At other times, you may find it necessary to voice an opinion. At all times, an effort should be made to listen to others in a considerate and respectful fashion. You shouldn't just be waiting for your turn to speak.
- ◇ *Dialogue should be focused on an important problem.* Dialogues shouldn't just be an excuse to get together to chat. There needs to be a clear case or dilemma on the table to focus the conversation. This is one of the few ways to ensure that a dialogue will remain fluid and improvisational while giving it structure. Formal procedures and polite diplomacy should not be the basis for a conversation.
- ◇ *Look for interconnections and underlying themes.* The group needs to scrutinize arguments for coherence and internal consistency. It should also look for ways to integrate ideas in order to see a larger whole.
- ◇ *Bring unspoken fears, contradictions, problems, and tensions to the surface.* By avoiding underlying problems, team members can spend most of their time talking around the real issues that affect their performance. It is necessary to be open and honest about conflicts within a group. Otherwise, a dialogue develops an air of unreality.

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By operating dialogues in this way, a team can avoid the learning traps associated with the treatment of knowledge and ideas. This also leads to a more mature approach to dealing with mistakes.

Team Tip # 2 — Generating Creative Conflict

Your team may be bogged-down in learning traps that prevent members from speaking openly and candidly. Sparks don't seem to fly off teammates during dialogues — everyone seems to lapse into lazy acceptance of proposals put forth without much qualification.

What is required is some creative conflict. This causes teammates to question and scrutinize ideas in a rigorous way, not according to the path of least resistance.

To illustrate how important this is, think about this scenario. Your team is engaged in an important project. Word of the project moves up and across the ranks of the Public Service. You don't want all the really hard questions asked when it reaches the minister's office, do you? Of course not, you want members of your team to do their homework and challenge themselves.

What can be done to engage team members and get them to challenge each other to achieve excellence?

Jerry Hirshberg asked himself this question as president of a prominent industrial design firm.² His team had to develop innovative products and make doubly sure that they worked as intended.

The solution to this dilemma involved adopting several reinforcing techniques.

- ◇ *The first step was to bring into the team people with very different points of view, work styles, passions, experiences, and skill sets.* This is a deliberate attempt to avoid creating a team of like minds. To accomplish it, Hershberg chose to hire people in “divergent pairs.” That is, when a new member came on board, an effort was made to make sure the next new recruit looked at things through different eyes.
- ◇ *Team members were then challenged to address problems from different points of view.* This was accomplished through sessions in which creative questions were asked. A deliberate attempt was made to encourage provocative questions that threatened complacent ways of thinking.
- ◇ *Team members can then be asked to defend arguments from points of view with which they do not necessarily agree.* This creates a new appreciation for other perspectives. Team members become aware of the ways in which others approach issues.
- ◇ *Last, the team members engage in a dialogue to integrate what they have learned from these exercises.* This is not a process of achieving compromises that dilute everyone's perspectives — fence-sitting is not an option. The exercise involves integrating diverse ideas to come to some reasoned judgment about the best way to proceed.

HOW CAN I MAKE AN IMMEDIATE DIFFERENCE?

These techniques underscore the value of a measure of diversity within a group. The conflict that naturally emerges should not be downplayed, but used to your team's advantage.

Teams tend to form among people with things in common. Think about the types of intellectual diversity that would benefit your team. Even if new team members can't be recruited, look for other sources of diverse points of view. Examples include guest speakers and dialogues with teams from elsewhere within an organization.

Team Tip # 3 — Generating Innovative Ideas

New ideas don't always develop spontaneously out of dialogue or relationships. Sometimes, a special effort needs to be made to create ideas. These efforts can take several forms.

If you are missing key knowledge or expertise, then you may try inviting an outside expert or person holding an alternative perspective. A "brain-squeezing session" occurs when a guest is asked a stream of questions in order to tap into his or her understanding of an issue.

There is also a variety of other intelligence-gathering tools available. Understanding the state-of-the-art can be accomplished through roundtables, guest appearances of accomplished practitioners, or the analysis of case studies. There's nothing wrong with stealing the best ideas from whatever sources are available. These can then be improved upon to create truly path-breaking innovations.

If you have a diverse and knowledgeable team, then "brainstorming sessions" may be worthwhile. This occurs when everyone spontaneously throws ideas onto the table. That is followed by an attempt to take stock of the result.

One organization having extensive experience with these types of sessions is the industrial design firm IDEO. It brings people from various organizational functions together for one- to two-hour sessions on a regular basis, integrating brainstorming into its organizational routines.

The sessions involve several components:

- ◇ *Team members are encouraged to offer ideas in rapid succession.* Everyone is given an opportunity to offer an idea. Judgment is deferred so that there is a continuous flow of ideas. The goal is to develop a large quantity of ideas. There can be more than a hundred ideas within the space of half an hour to an hour.
- ◇ *Team members are required to stay on topic.* Tangents can waste time. By focusing on a problem or objective, relevance can be maintained.
- ◇ *Everyone builds on each other's ideas.* Adding to, or elaborating on, someone else's ideas is encouraged. No one should dominate the spotlight. What matters most is that the group contributes to each other's thinking.

“ We should do our homework before substantiating or refuting ideas, challenge conventional wisdom, and remain open to the ideas of others.”

“ There's nothing wrong with stealing the best ideas from whatever sources are available.”

HOW CAN I MAKE AN IMMEDIATE DIFFERENCE?

- ◇ *There should be an opportunity to present ideas visually.* White boards or easel pads are made available to sketch ideas and give them form.
- ◇ *The organization makes an investment in team-building exercises.* This means that everyone has an opportunity to build their team skills and mutual trust through training. It also takes the form of group exercises and retreats.

Throughout this process, everyone should understand that it is okay to acknowledge gaps in knowledge. After all, the whole purpose of the exercise is to pool the team's collective knowledge and insights.

By making this type of practice part of the regular routine, a team is able to break through the trap of conducting empty meetings. These sessions generate energy and enthusiasm. They also cause a group to learn together, instead of just ratifying the learning that individuals bring to a meeting.

Organizational Learning Techniques



You may make improvements in your own learning, or the learning of your team. Sometimes this isn't enough.

Do you know what other units are doing? How can others benefit from the learning that you've done? Or more importantly, how can you help others generate new learning capacities? And, finally, how can you learn from the experiences of others? These are just a few questions you should be asking yourself on a continual basis.

You can answer these questions by implementing techniques designed to share ideas widely and build relationships across organizational boundaries.

- ◇ *Tell your story through "learning histories."* This involves writing a simple and accessible account of what you accomplished and the challenges you faced. It isn't a form of evaluation but a candid description of events as they unfolded, as told from the different perspectives of team members. These accounts provide others with guidance about how to improve their learning and don't offer simplistic remedies.
- ◇ *Bring outsiders into your team.* Teams often work best if they include people from other organizations or functions within the Public Service. Not only do they add new perspectives, they take new lessons away with them and share them with their home organization. This also helps determine what is going on elsewhere. For example, you want to find out where needless duplication of effort exists so that it can be avoided. And most importantly, outsiders help your team achieve clarity by encouraging team members to discuss ideas with consideration of outside audiences.
- ◇ *Make your team's activities more open and transparent.* Hoarding information can be self-defeating at times. True, there are times when confidentiality and framing expectations require some restrictions on information sharing. However, this usually doesn't relate to most of the learning that has taken place. Web sites, reports and events provide an opportunity to showcase what you've learned. Make use of them.

HOW CAN I MAKE AN IMMEDIATE DIFFERENCE?

- ◇ *Give your team a profile and make it accessible.* It often isn't productive to spend your team's energy by going on a road trip to sell its learning successes. Some people might view this as grandstanding. But you should make your challenges and accomplishments known. Those with an interest in improving the way they do things will actively seek out your advice. What is required of you is to make yourself accessible and look for opportunities to share. In turn, you may actively seek out the views of others who have faced similar experiences.
- ◇ *Actively engage in communities of practitioners.* Each of us is a member of several communities. There are others who share our interests, or have similar jobs and occupations. Communities and networks naturally build around these groups. What is required of you is to actively build relationships to help give these communities a sense of identity and cohesion. Once this happens, new knowledge and learning can flow through these relationships.

These techniques help you overcome learning traps associated with isolation and lack of connectedness. You cannot learn if your attention is always focused inward. You need to constantly look outside of your team for new sources of ideas.

The networks that result also allow you to situate your work within the broader scheme of things. You'll be able to see first-hand how you contribute to larger organizational objectives.

There is also a need to measure your progress.

Measurement provides your team with an "instrument panel" with which it can see what has been achieved. Besides helping you be more accountable, measures provide a valuable source of feedback. But let's be clear here: you're not measuring your learning activities, you're measuring the outcomes those activities produce. Remember, if your learning is directed at achieving an important goal, then it is progress towards that goal which should be measured.

This type of information also acts as a powerful incentive. It is an incentive to continual improvement by providing a tangible indicator of results. It also provides incentives to others by showing what can be achieved by those committed to learning.

HOW CAN I MAKE AN IMMEDIATE DIFFERENCE?

A Few Things to Keep in Mind



- Lasting and meaningful change starts with individual self-improvement. This becomes infectious within a team and, in turn, the broader organization.
- Everyone has a personal learning style. We need to understand and make the most of these styles.
- Improving the way we learn as individuals involves developing particular competencies.
- Teams can improve the way they learn by making use of mutually fulfilling dialogue, creative conflict, and brainstorming techniques.
- Sharing your team's lessons with the broader organization requires openness, accessibility and inclusion.

Notes

1. This discussion draws heavily from William Isaacs, *Dialogue and the Art of Thinking Together* (Toronto: Currency Doubleday, 1999); William Isaacs, "Dialogue, Mental Models, and Team Learning," Course Handouts, Core Competencies Program, Society for Organizational Learning (DIA•logos Inc, 2000); Palmer Parker, *The Courage to Teach: Exploring the Inner Landscape of a Teacher's Life* (San Francisco: Jossey-Bass, 1998).
2. For further information, see: Jerry Hirshberg, *The Creative Priority: Driving Innovative Business in the Real World* (New York: Harper Business, 1998).

Ask Yourself a Few Questions

- As you attempt to promote learning in your organization, what are the likely implementation challenges that you will face? Can you plan for them? Or do these challenges call for experimentation and improvisation?
- What are you prepared to do if your learning efforts face some setbacks? If you don't see immediate changes in the results, what will you tell your boss? How will you adapt and follow through on your learning commitments?

Maintaining Momentum Over the Long Term

You've probably seen several failed attempts to generate lasting change during your career. A new initiative is announced with much fanfare. Everyone gets excited but, a year later, no lasting change results. This even happens to well-planned efforts.

In fact, most change efforts do not fulfill all their original objectives.

This applies to learning, too. Keeping learning activities going can be just as difficult as getting them started. Even the best learning activities can get sidetracked, hit barriers, lose momentum, or lack follow-through.

But that doesn't have to happen to you. Success will result if you take care in the way you implement change.

The first thing to keep in mind is that there are some things you ought not to do.

- *Managers shouldn't roll out a proposal for change.* You will get nowhere by simply announcing an initiative and expecting everyone to buy into it. Even if you have consulted widely, the change process must be driven by those who are most affected by it. In other words, it is an organic process. You don't get much commitment if you simply demand compliance.
- *Change shouldn't be treated as a single event, but an on-going activity.* It is popular to speak of learning initiatives, as if learning is a simple project with a beginning and an end. While it might be true that your team conducts specific projects, learning from them is something that doesn't stop. In a sense, the vision you've created is something that you'll always strive to achieve.
- *You cannot bully your organization into cultural change.* Cultural change happens because team members adopt a vision and values that mean something to their daily work lives. They help interpret and improve their jobs. Cultural change cannot simply be imposed. Attempts to force vision statements down people's throats will not get you results.
- *Leading change is very different from organization to organization.* All individuals are distinct. All organizations have different webs of relationships. How then can you expect a single formula for change to fit all organizations? Leadership requires an attentiveness to the particularities of an organization. It's about adapting, not adopting, change techniques.



HOW CAN I MAINTAIN MOMENTUM IN THE FACE OF SETBACKS?

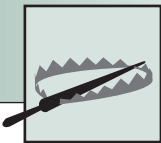
“Rolling out proposals or bullying an organization to change rarely produces the results you want.”

- *External motivators are useful at times, but not as useful as leveraging an individual's intrinsic motivations.* Since all individuals have natural curiosities and interests, these can be used to drive the change process. Changing incentive structures or reward schemes will not likely be enough.
- *Even the best teams have their ups and downs.* Strong teams rarely experience a steady stream of unambiguous improvements. Most teams experience cycles of good and bad. The key lesson is to not let bad experiences be a permanent setback. Teams should also strive to continually improve, regardless of at what point in the cycle they are.
- *Organizations experience office politics.* There is no sense in denying this fact because it is an unpleasant part of everyone's work life. Individuals act defensively, especially if they fear the changes taking place. Cynicism can build up. People put up walls around their turf in an attempt to prevent outsiders from gaining influence. There is a need to be forthright and honest about the existence of politics.

These are crucial considerations to keep in mind. Unless you prepare for them, you already have one hand tied behind your back.

While formulas and recipes may not be the right way to proceed, this doesn't mean that guidance isn't available. Accounts of common pitfalls and challenges provide a wealth of insights into the implementation process.

Common Pitfalls



Peter Senge has been advising organizations about how to improve the way they learn for over a decade. What he concluded from his mixed experiences was that very few attempts to improve learning actually succeed in large organizations.

This might not seem like the best advertisement for organizational learning. But a closer look found that there were a number of common pitfalls that needed to be overcome.

Senge and his colleagues at the Society for Organizational Learning proceeded to map out these pitfalls. They found that there are several key challenges related to getting started and maintaining momentum.¹ These tend to be voiced as complaints.

- ◇ *“We don't have time for this stuff.”* People often say this because they have large workloads and see learning as just another burden. Others say this because they think learning is something done in your spare time. Or managers may take on too much workload and be afraid of delegation. Clarifying these misconceptions may help matters. Remember, learning is something that should be done continually.

They may remain unconvinced. An even better approach would be to have them apply learning principles to help them manage their time better. The team should come together and look at ways of streamlining work flows and reducing demands on time that don't relate to core objectives. Teammates might ask themselves what systemic issues create undue time burdens. Or they may look at new ways to allocate responsibilities or organize work schedules.

HOW CAN I MAINTAIN MOMENTUM IN THE FACE OF SETBACKS?

- ◇ *“We have no help.”* Often people expect an experienced learning specialist to help them. Or they are unaware of what to do to promote learning. The main purpose of this guide is to provide this type of support. An annex of additional resources is also included. You will need to invest in your leadership abilities to ensure that, even if answers to questions are not readily available, you can motivate team members to seek out answers.
- ◇ *“This stuff isn’t relevant.”* Some think of learning as something that benefits an individual, but not something that really helps an organization. It is important that you make a business case for the learning that takes place. This may not involve showing precise returns on investments. But you can address perceptions of irrelevance by describing how a significant portion of the learning that takes place is closely tied to organizational results. It also helps to discuss the costs associated with not learning. These show how urgent the need really is.
- ◇ *“They’re not walking the talk.”* A gap often emerges between espoused values and actual practice. This often results from a lack of organizational awareness. It is vital that you work to create this type of awareness by promoting honest reflection within your team. It may be necessary to go a step further, however. By working with partners, you may likely have the benefit of an external reality check. Identifying and discouraging opportunistic careerism may also improve matters. It is important to keep in mind that helping others to walk the talk will require some patience and subtle negotiation.
- ◇ *“This stuff is silly.”* More often than not, attempts to dismiss learning efforts are brought about by fear and anxiety. This is natural when change takes place. You might try avoiding a “frontal assault” and, instead, take a less direct and more incremental approach that builds trust. A more participatory process will often allay fears by ensuring that concerns will be heard. Avoiding situations that create winners and losers will also promote a more inclusive approach to change.

Sometimes these types of responses are the result of knee-jerk cynicism. It is quite legitimate to be sceptical about new ideas. However, this shouldn’t result in a closed mind. You can reduce cynicism by using plain language instead of fancy jargon. Expressing the rationale for learning in terms of key objectives also helps to show its practical applications.

- ◇ *“This stuff isn’t working.”* The benefits of learning can often be difficult to see for others. For example, how do you convey to someone how your satisfaction with your work has improved? As well, learning results don’t always appear immediately. For example, you may gain a new skill, but not have an opportunity to really use it until sometime in the distant future.

There are many forms of evidence that can be used to gauge progress. Even if measurements aren’t available, careful documentation of results may help others understand what you’ve accomplished. Regardless of the method chosen, make sure that you’re measuring the right things. Don’t measure an individual’s performance improvement when the team’s performance is what really counts.

HOW CAN I MAINTAIN MOMENTUM IN THE FACE OF SETBACKS?

- ◇ *“We have the right way. They just don’t understand us.”* By now it should be clear that you’re better off approaching learning with humility. Even if you’re convinced it’s the best way to improve an organization, don’t assume others share your enthusiasm. There may be a long and drawn-out process of persuasion ahead of you.

In some cases, you may come up against a brick wall. A group may have an established way of doing things. There is little you can say or do that will change their minds. These are obviously challenging cases. A good start would be to place the onus on others to show that their method is yielding the best results. If such an evaluation is done on the basis of good faith, it may lead to some reconsideration.

Pitfalls need not stop the learning process. In fact, they often help you find areas of your organization that would benefit from learning. Within every challenge comes a new opportunity for discovery.

Frequently Asked Questions

This guide has attempted, up front, to address many common questions and concerns. There may be several outstanding issues related to implementation that you might be asking yourself. Here are a few of the more common ones that will help you trouble-shoot in the face of setbacks.

Q: *The federal government is committed to managing for results. How does this relate to learning? Are there learning measures that should be used?*

A: A rigorous evaluation methodology is an important source of feedback from which you can learn. Simply keep in mind that measurements are just one part of your organization that you need to keep track of. An undivided focus on numbers is a bad thing. But measurements can be an important part of an intelligence gathering exercise.

Q: *Whenever people talk about learning, they seem to suggest that failure is okay so long as you learn from it. Given the pressures of my job, I can’t afford to fail. Am I misinterpreting the relationship between learning and failure?*

A: Learning should not be considered a license to fail. You are right to suggest that failure is not an option. But sometimes trial-and-error is the only method available to gain important knowledge. By its very nature, trial-and-error and experimentation create risks of making mistakes. Use these methods only insofar as the risks are known and considered acceptable within the organization. When mistakes or failures do take place, it is important to make sure they don’t happen again.

Q: *I read somewhere that learning involves bringing individuals together to achieve a consensus. Is this true?*

A: Achieving consensus can be a worthwhile objective. However, it should not come at the cost of avoiding challenging conflicts, or paving over them. Calls for consensus should also not compromise the diversity of ideas within a team. Your team should be aligned towards a common purpose and shared values. Your team shouldn’t be like-minded and homogenous.

HOW CAN I MAINTAIN MOMENTUM IN THE FACE OF SETBACKS?

Q: *Does developing competencies require formal training? My organization's training budget is not very large. I'm worried that this excludes me from gaining valuable competencies.*

A: Training is only one way through which you can achieve self-improvement. There are a variety of self-improvement techniques available as well. This can include anything from doing some extra reading, to organizing a study group among your peers. Some competencies, such as improving interpersonal skills, are something you ought to try to improve all the time. You'd be surprised what tips your colleagues may be able to offer you.

A Few Things to Keep in Mind



- All attempts at profound organizational change can expect a few setbacks. Commitment and innovation are required to see you through the tough times.
- Most change management problems result from attempts to force change in a top-down, controlling and coercive way.
- People attempting to build a learning organization face a number of common pitfalls. These can be anticipated in advance and prepared for.
- Some people in your organization will likely voice complaints, such as lack of time to engage in learning. These are usually learning opportunities in disguise.
- Achieving consensus should not be an end in itself, especially if it means avoiding important problems. You can't force agreement, but you can encourage alignment.

Notes

1. This list is drawn from Peter Senge, Art Kleiner, Charlotte Roberts, Richard Ross, George Roth, and Bryan Smith, *The Dance of Change: The Challenges to Sustaining Momentum in Learning Organizations* (New York: Currency Doubleday, 1999).

Ask Yourself a Few Questions

- You were told about dilemmas faced by Malcolm and Justine at the beginning of this guide. Given what you've learned from this guide, what advice would you give to Malcolm? Or Justine? What could they do to improve the way their organizations learn?
- You've learned some of the basics of organizational learning. What aspects of this approach do you find particularly useful? What aspects would you like to know more about? Where would you go to find out more? Most importantly, where would you go to share experiences with organizational learning?

Helping Your Fellow Public Servants Learn

It is always useful to think about how new ideas about learning can be applied immediately to a real-world situation. If nothing else, such an exercise helps us critically reflect on these ideas. It helps us achieve greater clarity. And it gets us into the habit of continually applying learning to our daily work lives.

The application of learning ideas obviously depends on the organization in question. Let's take one of the two cases mentioned at the beginning of this guide. So how should Malcolm and his policy research team proceed to apply the lessons discussed in this guide? Let's help him step through the process.

Step # 1 — Looking at Learning in a New Way

Before Malcolm could help his team learn better, he needed to revisit some of his assumptions about what learning involves. There were several misconceptions that seemed to hold Malcolm back.

First of all, he took for granted that improving learning would involve a special initiative rolled out from the top. This is how most Public Service renewal efforts seem to take place, he thought, so why should learning be any different? If the initiative is good enough, then everyone would recognize it and success would follow. In reality, however, renewal never really takes place in this way.

So Malcolm had to realize that learning involves exercising some individual initiative. It involves experimentation. And it involves a great deal of personal self-development. This suggests that improvements in learning start with you, not your boss.

Malcolm also had to recognize that team learning is an inclusive group effort. He was in the habit of trying to direct the group's activities. He was, after all, a manager. He'd always thought that was what managers were supposed to do. People would expect him to have answers to their problems.

This led Malcolm to think that the team had an unhealthy dependence on his direction. He was embarrassed to admit that he didn't actually have the answers that team members were looking for. The team needed to build its own learning capabilities instead of relying on the guidance of a manager.

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

Finally, Malcolm was used to thinking of learning as an activity that was separate from his daily work. On the contrary, it is about constantly looking for lessons on how to improve work. It is also about continually seeking out new opportunities for personal and team development.

Once he had achieved this change in his thinking, Malcolm decided to approach learning from a different angle.

He decided not to mandate a new approach. Instead, he would try to serve his team members. The first step was to ask team members what their priorities, challenges, and aspirations are. He vowed to do his best to give his team the support it needed in order to flourish.

Step # 2 — Diagnosing the Team’s Learning Traps

This change in approach required that Malcolm be cautious and not get in the way of the learning process. But the biggest challenge involved changing the way the team operated as a group.

Malcolm had his own ideas about what the group was doing wrong.

He thought that one team member, Odette, was hoarding information that the team needed. She had laid a claim to a particular file. It was as if she actually owned part of the team’s activities. When group members offered constructive suggestions about how to improve her policy advice, she would take this as personal criticism. The more suggestions that were offered, the less likely she was to let team members look at her work.

Another team member, Louis, almost seemed to have the opposite problem. He would constantly make demands of other team members. It was as if he was pushing his work onto other people. People were starting to avoid him around the office. In response, he would schedule team meetings. This involved taking up everyone’s time with issues that would be best dealt with throughout the day on a one-to-one basis.

Malcolm would also get phone calls from other departments complaining that Louis wasn’t consulting them. The files he tended to work on required cooperation from other departments. It wasn’t clear whether Louis was actively collaborating with outside partners. He seemed to focus most of his time lobbying senior officials in other departments. This seemed to create resentment among those who actually did the work.

Christine is another team member who always seemed to be overloaded with work. This had puzzled Malcolm, because she didn’t appear to have more responsibilities than other group members. Was she not being productive? Did her job involve more than he previously thought? She did her job extremely well, but there seemed to be signs of burnout. Whenever Malcolm raised the issue of her workload, Christine would simply say that everything was fine.

Despite these challenges, the team was fulfilling its responsibilities. But it could do better.

“The team needs to build its own learning capabilities instead of relying on the guidance of a manager.”

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

Malcolm didn't know how to approach the issue at first. Raising the issue directly could provoke negative feelings. Telling people that they could do better seemed to be a bigger hassle than it was worth. This is why he avoided confronting team members for so long.

In a way, it was a good thing that Malcolm resisted the urge to tell others what they were doing wrong. It was not a message that members were prepared to hear.

The reason for this attitude was that team members had concerns about Malcolm's leadership. Their concerns just seemed to lie beyond their ability to discuss them. Malcolm was an experienced expert in the policy field in which the team worked. Team members were reluctant to second-guess his decisions.

Malcolm didn't help matters by being dismissive of several ideas that team members thought required further analysis. Once, Malcolm called a proposal "crazy" and something that senior officials would never accept. More often, his dismissals were more subtle and took the form of a snide comment, or a joke, or a look of boredom and disinterest. Malcolm wasn't very aware of the signals he gave off.

All of this was creating an unproductive tension within the group. They all felt the tension but no one could put their finger on the cause.

Yes, everyone complained from time to time. This usually took place as a couple of teammates vented their likes and dislikes over coffee or drinks. But nothing constructive was being done.

"This is just what life in large bureaucracies is like," one team member would say, "Get used to it." Another member, Dimitri, suggested that the way you dealt with it was to "Kiss up, kick down, and cover your tracks." This had actually become his career development motto.

These comments are a sure sign of a defeatist attitude. It wasn't the attitude that Malcolm had hoped for when he signed-on as manager. It was when Malcolm heard that comments like this were going around that he decided to act. (You might not want to wait that long.)

So instead of criticizing team members, Malcolm chose to bring them together to jointly address their learning challenges.

He started by setting aside an afternoon so that the team could discuss the traps that had prevented them from learning. Malcolm booked a room in another building — far away from the distractions of the office. Everyone was asked to check their cell phones at the door.

Despite being given a great deal of advance warning, Christine had a schedule conflict. She sent an e-mail message noting that she wouldn't be able to attend. Malcolm insisted that she resolve the conflict and attend the afternoon dialogue session. This was going to be the team's priority.

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

There wasn't enough money in the budget to hire a trained facilitator for the dialogue, but that was fine.

Malcolm had asked a colleague from another department to attend. His name was André. He wasn't a close friend of Malcolm's. In fact, André was an important partner who had been voicing complaints about the way the team operated.

There was some concern that, by inviting an outsider into the dialogue, the team would be seen as weak and incapable of dealing with its own internal problems. It actually sent the opposite message. André was impressed by Malcolm's willingness to resolve problems in such an open and honest way.

The dialogue that took place opened the eyes of team members to dilemmas the team faced. This took place despite the fact that the team could only scratch the surface of these dilemmas.

Malcolm chose not to moderate the conversation and resisted the urge to jump in to offer his point of view. Dimitri, who had originally shown little interest in the session, was asked to moderate the debate. He was given a few suggestions from this guide about how to proceed.

Everyone was asked to talk about their perceptions of what learning traps the team was experiencing. They each gave their views in turn without any initial comment from the outsider. Once a large list of dilemmas had been put up on an easel pad, a more in-depth conversation took place.

Initially, members were not very forthcoming. Some contributions were actually pretty vague. Then, Odette claimed that other members didn't really trust her to do her job. She offered a list of other grievances. After Malcolm encouraged her to say more, other members began opening up to the group. André would offer an outsider's view from time to time.

The resulting list provided a map of issues that the group would have to address over the next few weeks. Team members began to think more critically about their own treatment of others. Malcolm, in particular, started to become more aware of the signals he gave off. There was a widespread recognition that the group had to collaborate more closely and respectfully.

The actual dialogue session did not resolve all the outstanding issues. How could a single session possibly do that? It did, however, offer something of a fresh start. Team members saw it as a new direction. But this feeling would only last if there were some follow-through.

“There was some concern that, by inviting an outsider into this dialogue, the team would be seen as incapable. It actually sent the opposite message.”

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

Step # 3 — Setting a New Team Vision

The team was given a weekend to reflect on the lessons learned during the first dialogue. A great deal of skepticism still existed among some members about the potential to change things. Others, on the other hand, thought that this was the start of a whole new approach. They were going to walk into work on Monday and immediately change the way they did things.

This was a risky time in the process. It wasn't exactly clear whether everyone was working with realistic expectations. Some took a wait-and-see attitude that might stall progress. Others could become discouraged by the slow pace of change.

As well, the team had no clear direction in which they wanted to go. There wasn't a shared attitude.

Malcolm decided to set some time aside during the week to bring members together to set a common vision. This time there wouldn't be enough time to set aside a whole afternoon.

The team would meet for 45 minutes first thing in the morning every few days. The start of each day was usually good for the group because there were few schedule conflicts. During each session, team members shared their own personal visions of the workplace they would like to work in.

These meetings were different from the first in one crucial respect. Malcolm, the team's manager, wasn't involved. It was up to the team to describe their "ideal" workplace. Malcolm didn't want to put a damper on the group's discussion or impose his view of the organization's future.

In the meantime, Malcolm acted on a few suggestions from the first dialogue. Christine had come to recognize that she needed to take a more proactive approach to dealing with her work. She had let things build up to the point of crisis before acting on issues. She was reacting, not anticipating. But she also had asked Malcolm to help her get better access to information she needed from outside the department. She didn't have the clout to get the information far enough ahead of time. But Malcolm did.

Malcolm also discovered that his team was entitled to additional funds for individual career development. There were a number of interesting programs and events within the Public Service. He had no idea that they had existed before now. He was going to make the most of these opportunities by encouraging team members to take advantage of them. This included giving them greater flexibility in the way they scheduled their work.

Malcolm also worked to change the incentives that the team faced. He decided to base an individual's personal evaluation on her or his contribution to the team. Rewards and praise would be given out for team performance, not an individual's victories.

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

Malcolm then asked the team to report on its progress for a new vision. The team reported that they were making great progress, but needed more time. All told, the team worked on its vision for three weeks.

When their vision was completed, the result stunned Malcolm at first.

Before the team had started this exercise, they hadn't really come together to discuss their jobs. They had been doing things in isolation. Now, there was a recognition of how each member could build on the strengths of the others. For Odette, in particular, this helped to show how the hoarding of information and guarding of turf created problems. There was no more "ownership," there was only a shared agenda.

There were several aspects to this agenda. New types of policy were looked at as possible ways of achieving important public service objectives. There was also a vision of how the team wanted to interact as a group.

Malcolm was extremely pleased with this result. The suggestions seemed practical because they had been made by the people who had first-hand experience with the topic. And the whole vision reminded him of his original aspirations for the team — he was given an opportunity to look at innovative areas of policy that would accomplish team objectives.

As an added bonus, because the team had developed the vision themselves, no one had to be sold on the idea. Not everyone agreed with every aspect of the vision — it was not a mushy compromise. But everyone could align their own personal visions to that of the group.

Step # 4 — Closing the Gap Between Vision and Reality

The vision that had been created was achievable. But make no mistake — it was very ambitious. There were also some aspects that didn't seem to result in any particular destination — they involved a never-ending commitment to improve.

How to fulfill this vision was another issue. Actually, Malcolm was at a loss for ideas about how to proceed. He now worried that he had created unachievable expectations that would only result in greater cynicism.

This is the point that challenges many managers' resolve. Life had seemed so much simpler before this process was set in motion.

But the opportunity was also exhilarating. For the first time in recent memory, Malcolm really felt challenged by his job. The energy was also becoming contagious. It truly was an improvement over the endless meetings that had produced minutes that no one would read.

Malcolm chose to proceed by conducting brainstorming sessions. He was looking for ideas about how to change the way things were being done within the team.

At first, the results were disappointing. The team created a list of interesting suggestions, but nothing groundbreaking — they just seemed to have been pulled off the shelf. Malcolm wasn't sure they really addressed the heart of the matter.

“Before, the team hadn't really come together to discuss their jobs. Now, there was a recognition of how each member could build on the others' strengths.”

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

There was a need for a fresh perspective. Malcolm achieved this in two steps. First, he brought outsiders into the brainstorming sessions to offer new knowledge and new perspectives. Then he did something that would really change the way the team operated: the next person to be hired to the team would be someone with a very different perspective on the team's work.

A new job had opened up. Malcolm went out of his way to hire someone who brought a different perspective to the unit. He found Eli, who also brought with him a very different set of occupational skills. Unlike other team members, Eli wasn't an economist.

At first, other team members had trouble in taking Eli seriously. He didn't seem to talk their language. But instead of being an impediment, it proved to be a major benefit. Suddenly team members had to explain themselves in a way that didn't include jargon. They had to explain why certain concepts and theories applied in particular situations.

Their explanations were not always adequate. Eli's no-nonsense style helped ensure that team members recognized their leaps in logic, dubious assumptions, and faddish buzzwords. Before Eli's arrival, the team was lulled into confidence by the popularity of their ideas.

The vision began to change slightly as members started looking at their subject with a more critical eye. They were less likely to take things for granted. Eli's presence proved to be such a positive influence that Malcolm decided to hire only people who offered the group some greater diversity.

As the brainstorming sessions proceeded, members were better able to think outside of the box. In fact, they actively sought out new sources of diverse ideas. Team members would spend more time talking to other public servants to discover new knowledge and perspectives.

It was at this time that Malcolm spent some time working with Louis to help him manage horizontal relationships better. His first instinct was to enrol him in a course, but he knew that Louis couldn't sit still through a long lecture. Malcolm was also sceptical about the value of formal training in this case.

Malcolm did know, however, that Louis did learn best through conversational methods. Louis liked to ask questions and discuss stories — this was how he preferred to receive knowledge and information. And Louis was aware of this, too. What Louis wasn't aware of was the trouble he was causing others by pushing work onto their plates.

The solution to this problem came when Malcolm and Louis decided to create a joint committee with other units that had a stake in the team's work. Louis would learn first-hand from them how his work affected the entire system. He would actually get an earful of feedback on this issue, to put it politely.

After a few meetings, Louis began to think of his work as one part of an integrated system. In the subsequent months, he would learn a great deal about how large the system was ... and how dependent everyone is on everyone else.

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

The joint committee meetings didn't end all of the complaints, but there was a noticeable improvement that could be built upon.

Step # 5 — Maintaining Momentum and Reflecting on Results

After a while, it became clear that the organization's culture really was changing. Teammates would pitch in to help others achieve team goals. New ideas were actively shared and scrutinized. Things were going well.

But this is no time to rest on your laurels. There is always room for greater improvement. There is always a risk of falling back into old routines.

Malcolm knew his team would have to reflect on its successes just as critically as it reflected on its shortcomings. So Malcolm asked team members to assess what made a particular policy proposal successful. Everyone was asked: "What makes you so sure that we can replicate this success in a new context? What specifically caused the success? How could this be improved? What is the current state-of-the-art?"

This time he invited his friend Justine to join the meeting. As you know, her organization had gone through the challenge of sustaining momentum. It had undergone a long process of introspection and emerged stronger than ever. Malcolm thought she could offer some insights.

During a meeting, Justine talked about the process that golfer Tiger Woods went through to improve his golf swing. Woods had achieved enormous success with his current skills. But he also knew that he relied too heavily on his youthful strength when hitting the ball. He knew his current successes would be unsustainable in the long term. He had to play smarter, not harder.

So Woods redesigned his golf swing. This was not a small feat. He had invested years of practice into his old style of play. He had developed enormous amounts of "muscle memory" that would have to be reprogrammed. This took years. His game suffered in the process. Eventually, Woods would start winning golf tournaments again. He would win these tournaments with even more impressive scores.

This was a great example of how you sometimes have to take one step backwards in order to take two steps forward. Even if something appears to work well, it doesn't mean that you can't make improvements. It also tells of the risks of not reflecting on your successes in a sober way.

Tiger Woods had been a vivid illustration for Justine's team. But it was also a difficult message to swallow.

Malcolm's team had achieved some tangible successes. Now other policy shops were asking for tips. They wanted to replicate the team's results. They wanted the team's "best practices." Justine cautioned them about the dangers of taking that route.

Instead of devoting their time celebrating past successes, the team chose to revisit everything that they had accomplished. They were looking

“Sometimes you have to take one step backward in order to take two steps forward. Even if something appears to work well, it doesn't mean that you cannot make improvements.”

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

for undetected weaknesses. They were also looking around for new threats and opportunities.

They also decided not to write up their best practices for others. Instead, they invited members of other teams to participate in their learning activities. Not only did this help others learn from their experience, but it also gave the team fresh insights from which to draw.

Malcolm also faced a number of pitfalls along the way. One member of the team, Joel, wasn't really contributing much. He was actually complaining about the team's activities. It wasn't clear to him that real improvements were being made. The team was also wondering whether Joel was holding them back. They didn't appreciate his negative attitude.

After some discussions, Malcolm learned that Joel was really quite fearful of the team's new direction. He had previously been responsible for managing horizontal relations. Now, all team members were doing this job. Joel was wondering if there was any future for him within the team.

Malcolm responded by sitting down with Joel and looking for new areas of personal and professional development. There may be other work within the team that could be done in a way that built on Joel's strengths. On the other hand, maybe the team was holding Joel back from pursuing his interests elsewhere. Both possibilities had to be entertained.

In the meantime, Joel needed to be given assurances that he would be treated in a fair manner. Once he was given assurances that the team was willing to invest in him, he started to open up more. He began participating in the dialogue sessions in good faith.

Eventually, Joel would leave the team for a job elsewhere. But the team helped him build the new skills he needed to make the transition. Now Joel is helping another team within the Public Service improve the way it learns.

A Few Key Lessons to Remember



As you can see, the application of learning ideas requires some flexibility and inventiveness. Had we selected Justine's case, the exercise would have read very differently.

Justine would have had to help her organization remain more vigilant of emerging threats and opportunities. Greater openness to new ideas needed to be instilled. Staff needed to be less wedded to old reforms and more driven to pursue new avenues of change. This is to name just a few of the challenges Justine faced to keep her organization at peak performance.

If Malcolm and Justine were to reflect on the key lessons that helped their organizations improve, what do you suppose they would be? There is, of course, no magic formula to their success. On the other hand, there are a few key insights that we all should think about carefully:

- ◇ *The widespread embrace of learning is ultimately driven by cultural change. Tinkering with organizational procedures or installing new technologies*

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

only get you so far. People first need to value learning and understand how it benefits themselves individually ... as well as their team and the Public Service.

- ◇ *Learning starts as a quest for self-improvement that becomes infectious.* In other words, learning isn't an initiative that is simply rolled out. It starts with an individual seeking improvement in her or his work life. That person then enlists teammates to do the same. They, in turn, demonstrate to others the value of learning.
- ◇ *Sometimes managing less is more.* A manager can only do so much, given the constraints of time, energy, and knowledge. It is tempting to take on an organization's burdens yourself. It is also difficult to relinquish control. Management in a modern workplace is about subtle forms of influence that build capacities and cultivate an appreciation of learning in others.
- ◇ *Every team falls into learning traps.* A learning team understands those traps and sees them as a source of opportunity. This is where open and honest dialogue is so crucial, not as a special event but as an ongoing method of communicating with others.
- ◇ *Diversity must be leveraged as a source of innovation.* Inclusiveness isn't just about involving people with different characteristics, experiences and backgrounds. It's about looking at a diverse workforce as a rich source of ideas and insights. Only when people understand that their input is valued do they feel a strong sense of mission and belonging.
- ◇ *Continuous learning is about never being content with the present.* When organizations become too confident or rest on their laurels, complacency sets in. A true learning organization doesn't buy into its own hype. Instead, it's constantly on the lookout for weaknesses and new opportunities.
- ◇ *Learning is a commitment to improvement over the long haul.* While there are many things that can be done immediately to improve learning, more profound change is a longer-term project. This means that you can expect some setbacks from time to time. That is why patience and commitment are so crucial to lasting improvement.

These are the themes that tend to set a learning organization apart from the rest.

AN EXAMPLE OF HOW THESE LESSONS CAN BE APPLIED

Become Part of Our Learning Community

You may be surprised to learn that the case described above draws heavily from the experiences of real public servants like yourself.

We have been able to tell this story because public servants with an interest in learning have actively shared their experiences and ideas. The chances are that, if you've taken the time to read this guide, you have already demonstrated an interest in improving learning.

There are others like you who would like to learn from your experiences. The challenge is finding out who they are and how they can be contacted. The Leadership Network (www.leadership.gc.ca) offers you an opportunity to connect with others interested in learning. Look in the section on On-Line Resources below to find out more.

ANNEX: WHERE CAN I GO TO LEARN MORE ABOUT ORGANIZATIONAL LEARNING?

Where to Go for Additional Help

There is a wealth of information out there about how to turn learning principles into action. This annex contains a selection of readings and Web resources that offer further guidance.

Action-Oriented Public Service Readings

Canadian Centre for Management Development,. Deputy Ministers' Committee on Learning and Development, *A Public Service Learning Organization: From Coast to Coast to Coast — Directions for the Future*, 2000.

This document outlines the Government of Canada's learning agenda. It discusses six learning attributes that should guide the Public Service, and makes 43 recommendations on how to create a Public Service learning organization.

Indian Affairs and Northern Development, The Leadership Network, *Tools for Leadership and Learning: Building a Learning Organization*, 1998.

This pocketbook guide offers several practical group exercises that will help you build and strengthen teams; create team vision and mission; solve problems; make learning part of a team's culture; improve the way we work; and consult the people we serve.

Public Service Commission, *Managers Handbook on Staffing & Recruitment*, 2000.

This guide provides managers with straightforward and authoritative advice on how to make the most of the Public Service staffing system. It is written from a manager's perspective and is continually updated.

Action-Oriented Books

Argyris, Chris, *Flawed Advice and the Management Trap: How Managers Can Know When They're Getting Good Advice and When They're Not* (New York: Oxford University Press, 2000).

Argyris provides pointers on how to avoid many of the learning traps associated with receiving advice from teammates and consultants. It also provides insights into acting on the learning that takes place within your organization.

Garvin, David A., *Learning in Action: A Guide to Putting the Learning Organization to Work* (Boston: Harvard Business School Press, 2000).

This guide provides a detailed description of the learning organization and outlines several useful steps to creating one. The book's strengths include a discussion of outside intelligence gathering, measuring results and the use of experimentation. Several interesting case studies are also discussed.

WHERE CAN I GO TO LEARN MORE ABOUT ORGANIZATIONAL LEARNING?

Isaacs, William, *Dialogue and the Art of Thinking Together* (New York: Currency, 1999).

This book will help you orchestrate dialogues with your teammates. Besides describing the key dimensions of productive dialogue, Isaacs provides advice on convening dialogue, improving flow and depth of the conversation, and overcoming conversation traps.

Senge, Peter, Richard Ross, Bryan Smith, Charlotte Roberts, and Art Kleiner, *The Fifth Discipline Fieldbook* (Toronto: Currency Doubleday, 1994).

This collection of notes, articles and exercises will help you promote systems thinking, team learning, and the development of shared vision within an organization. It also offers insights into improving personal mastery and scrutinizing the mental models we use to understand our work.

Senge, Peter, Art Kleiner, Charlotte Roberts, Richard Ross, George Roth, and Bryan Smith, *The Dance of Change: The Challenge of Sustaining Momentum in Learning Organizations* (Toronto: Currency Doubleday, 1999).

If you are having difficulties promoting organizational learning, then this guide offers practical recommendations for initiating, sustaining and rethinking learning initiatives. This book contains information about common challenges faced and how to overcome them.

Stone, Douglas, Bruce Patton, Sheila Heen, and Roger Fisher, *Difficult Conversations: How to Discuss What Matters Most* (New York: Penguin, 2000).

As the title suggests, this book will provide advice about how to connect with co-workers and resolve tricky interpersonal problems. It will help you identify and explore learning traps in your team without creating unproductive conflict.

On-Line Resources

Shaping a Public Service Learning Organization: From Coast to Coast to Coast
www.ccmd-ccg.gc.ca/learning-tour/index.html

This Web site provides a window into on-going organizational learning activities taking place within the Public Service of Canada. News, helpful information, and an opportunity to share ideas are provided.

The Learning Coach
www.ccmd-ccg.gc.ca/learning-coach/webs/public/welcome.asp

This interactive Web application will help you develop a personal learning plan, a useful step in personal self-development.

The Leadership Network
www.leadership.gc.ca

This Web site offers public servants ideas and insights about improving their leadership abilities. The network section provides a large list of specialized networks, including learning.

WHERE CAN I GO TO LEARN MORE ABOUT ORGANIZATIONAL LEARNING?

The Learning Resource Network
www.learnnet.gc.ca

This Web site provides a list of learning resources to help public servants with their individual learning needs.

