

Building a Cross-Organizational Learning Community: Reflections on SoL's Greenhouse III

Carol Gorelick and Barry Sugarman

Introduction and Context

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As the chairperson of the Society for Organizational Learning's (SoL) Greenhouse III design committee, I hope to communicate the spirit of collaboration and learning that was palpable during the event. As a SoL Council member *and* a proud alumna of George Washington University's Executive Leadership Program, I was gratified to participate in bringing these two organizations together and quite thrilled to see all concerned so clearly enjoy and benefit from the experience.

The Greenhouse design committee (see the sidebar) wanted to continue nurturing the traditions that were seeded and cultivated at the two previous Greenhouses. Three overarching principles guided our efforts. First, we strove to increase participation by all three SoL constituencies: researchers, practitioners, and consultants. Second, we wanted to provide an environment that encouraged collaboration and interaction. The design challenge was to balance structure and flexibility. Third, we hoped to include diverse perspectives into our conversations: for-profit and not-for-profit; organizations, teams, and individuals; and local, multinational, and global organizations.

Dangerous external circumstances have set the tone for the gathering both this year and last. Greenhouse II was poignant, taking place 10 days after September 11, and brought us closer together as a community. This year, snipers besieged the Washington area for several weeks but, fortunately, were found, barely two days before our event. Once again, we were called to reflect on what really matters, and we began with a sense of heightened awareness of what we individually and collectively value.

On Sunday night, more than 40 attendees met for an informal dinner. Our guest of honor, Egbe Osifo, manager for human development programs at the World Bank Institute, in her brief address on "Cultivating Leaders for Change," raised our consciousness about the enormous global health-care problems and opportunities to improve the lives of many. She eloquently described a serious societal threat supported by concrete data. Osifo embodies many of SoL's design principles with her practice and represents multiple constituencies as a medical doctor and MBA, practitioner and educator. She is involved in strategy, policy, implementation, and education in the UK, the US, and developing countries in the Middle East, Asia, and Africa. She is a role model for inspirational leadership and left us individually and collectively with a mandate to act.

On Monday morning, Karen Ayas, cofounder (with John Carroll) of the first Greenhouse and our link to all three Greenhouses, skillfully introduced the history and led us

G3 Design Committee

Carol Gorelick (chair)
Karen Ayas
John Carroll
Jim Ritchie-Dunham
Lilly Evans
Ben Bruce
Michael Pergola
Margaret Delaney Gorman
Sue Simmons
Frank Schneider
Jeff Clanon
Jackie Tabb
Barry Sugarman

in a SoL tradition—check-in, a process to welcome all and bring the whole person into the room. Next, I provided the context for the work of the SoL community. I chose to emphasize the evident paradoxes with a picture in which each of the three SoL constituencies—researchers, practitioners, and consultants—are represented by a box, but as distinct membership categories, SoL members struggle with the notion of belonging to a single constituency. Ultimately, SoL aspires to become a web of inclusion or a spiral that integrates all three constituencies and encourages flow among individuals, groups, organizations, and functions. This applies at multiple levels—individual, group or team, organization, and society—as well as within SoL’s structure—founding SoL, local SoL fractals, and fractals across the growing Global SoL Network. As reflected in the Greenhouse design principles and this year’s theme, the overarching objective and research challenge is to do meaningful work that is simultaneously rigorous and relevant.



Three constituencies

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Representatives came from all constituencies and several countries, including Austria, Canada, Japan, South Africa, and the UK. We built on past Greenhouse successes and enhanced the process. There was some new learning on which to build for the next Greenhouse, including:

1. Have the Greenhouse at an academic site. The participation of George Washington University staff and doctoral students added tremendous value. It seemed to legitimize the research agenda by setting the tone for discovery, capacity building, and collaboration.
2. Allow space for unplanned sessions so germination can occur. The planned germination and plenary sessions may spark ideas that belong in a completely different category from scheduled sessions. Although someone may not be interested in the specific research topic emerging in a particular session, it may initiate another idea that could lead to collaborative research.
3. Provide a venue to answer an overarching question related to sustainability, which concerns us all and is important for a global learning community to focus on. *How can we collectively become intelligent about the most basic systems shaping global well-being?*

We once again closed with the poem from Greenhouse II (see the sidebar). Each participant left the Greenhouse with a rose, both to accentuate the theme of growth and to remind us of the collective spirit.

Several weeks later, a member of the research committee received a message from a new SoL consultant member and first-time Greenhouse participant: “SoL Greenhouse III has definitely gotten under my skin. I can’t work on any project now without thinking of a potential research component.” This small win presents an exciting challenge—to make research an integral part of every project and share knowledge across organizations.

Research Themes and Cross-Currents

Barry Sugarman

The goals for Greenhouse III, as set by the design committee, were:

1. To learn from collaborative research on organizational learning and transformation.
2. To explore the challenges of combining relevance and rigor in research.
3. To foster partnerships for further collaborations among researchers, managers, and consultants.

Some 30 sessions took place, of which I can mention only a few here. I focus on the dominant themes: action research and systems thinking (the subject of plenary sessions)



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It Felt Love

How
Did the rose
Ever open its heart
And give to this world
All its
Beauty?
It felt the encouragement of light
Against its
Being,
Otherwise,
We all remain
Too
Frightened.
—Hafiz

From *The Gift: Poems by Hafiz, The Great Sufi Master*, translated by Daniel Ladinsky. Copyright ©1999 by Daniel Ladinsky. Reprinted by permission of the author.

and leadership development and integrated infrastructures (emerging foci of collaborative research) (see the sidebar for the complete list of topics covered in the germination sessions).

Action Research

Bill Torbert and Alain Gauthier skillfully presented the opening session on action research. They demonstrated why action research is essential to real transformation—both personal and organizational—and why it is central to effective leadership. Three members of the SoL Sustainability Consortium (researchers Hilary Bradbury and John Carroll, and Rob Fredricks from Ford) presented the implications of collaborative action research in a later session. The consortium supports “green” product development and other change projects, using the tools of organizational learning, and it conducts case studies of these efforts, some retrospectively and some concurrently. The case studies focus on a triple bottom line, defined as people, planet, and profits. In a germination session, Dan

and Rita Kowalski, Joel Harmon, and Dan Twomey presented another good example of academic-practitioner action-learning research on a national scale from the US Department of Veterans Affairs.

Systems Thinking

John Sterman, in his keynote session entitled “Cloudy Skies,”¹ demonstrated that the “fifth discipline” itself remains at the heart of important research and thinking. Rather than presenting one of his studies on how quality improvement studies fail to be sustained, Sterman chose global warming as his topic. With shocking clarity, he analyzed key statements from the Bush administration’s position on this issue, contrasting its argument based on “common sense” with that of the scientific community, using systems thinking. He demonstrated once again that even the “smartest” humans usually perform very poorly when facing problems that involve system dynamics. Sterman’s interpretation is that the human brain appears to have evolved over thousands of generations to be good at pattern matching but not at simulating stocks and flows. So pattern matching is what we use, leading sometimes to seriously erroneous conclusions, for example, the amount of time remaining to undo the effects of global warming and the magnitude of change needed.

Two other teachers of systems thinking, Marilyn Herasymowych and Henry Senko, who also noticed that their students used pattern matching to understand systems, decided to find a way to use this as an asset rather than treat it as a problem. They created and demonstrated training that applies pattern-matching principles using 10 pairs of archetypes, each with both positive and negative versions. They are seeking research partners to carry their work further.

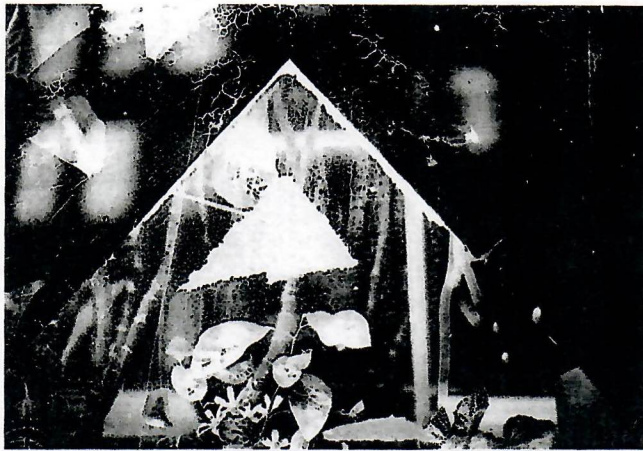
Peter Senge offered his own reflections on “Cloudy Skies” and led the lively discussion that followed.

Leadership and Leadership Development

For SoL members and our cosponsors at George Washington University, leadership and leadership development remain dominant themes. Among the research featured was a panel with multiple presenters from GWU, surveying the work of the George Washington Center for the Study of Learning. Because SoL audiences usually appreciate senior practitioners who speak candidly about their leadership practices, we also heard from Arjan Overwater, senior vice president at Unilever Bestfoods. In his session entitled “Unilever’s Path to Growth,” Overwater showcased its innovative and boundary-stretching work with emphasis on personal growth and community building. “Leadership Growth Journeys”

Greenhouse Germination (break-out) Sessions

Presenters	Presentation or germination topic
Clyde Crowell, James Leslie, Chris Wagoner, GWU	Leadership and moving from "I" to "we": Transformational learning experiences, building collective trust, and dialogic leadership in AA, formal teams, and professional education associations
Marilyn Herasymowych and Henry Senko	Making systems thinking accessible using systems archetypal mapping
Katherine Holt	Exploring the people practices behind innovation
Arjan Overwater, Unilever	Human drivers of organizational success, research proposal from Unilever
Chris Kayes, Clyde Crowell (USMC, Ret.), Patricia R. Brown, GWU	Learning in multidisciplinary teams: Lessons from Marine Band combos
David Koehn and Rima Shaffer	Beyond rigor: A search for new practices for thriving in chaos and complexity
Christoph E. Mandl, Vienna University	Organizational learning in early phases, before and in the first three years after the founding of an organization
Mebs A. Loghdey, University of Cape Town; Paul Alexander, Julie LeRoux, Old Mutual Insurance	Model of organizational learning integrating scenario thinking, ROI, capacity building, and knowledge management
Susan C. Hull, Carol Gorelick, Barry Sugarman, and several SoL organizational liaisons	Project LEAD research: Insights into design possibilities for phase II of collaborative research on leadership development
Ellen Pruyne and Michael Pergola	From consultancy to practice to research in building a learning organization: Wachovia Corporation
Hilary Bradbury, John Carroll, Rob Fredricks	Research collaborations in the SoL Sustainability Consortium
Fred Simon, Prasad Kaipur, Jim Ritchie-Dunham	Systems thinking—a conversation
Rita Kowalski, Dan Kowalski, Ellen Kollar, US Department of Veterans Affairs; Joel Harmon, Dan Twomey, Fairleigh Dickinson University	New challenges and learning from large-scale, collaborative research project. A national study of workplace stress and aggression in the US Department of Veterans Affairs
Paulette Seymour, Christine Kluczniak, University of Massachusetts Memorial Medical Center; Vince Pelote	Nursing leadership at UMMMC's comprehensive leadership development strategy utilizing action research and reflective learning.
Arjan Overwater, Unilever	Lessons on intercultural leadership development. Framework and recommendations on how to develop leadership in different cultures
Arjan Overwater	Unilever's new way of learning and growing
Jim Hazy, Brian Tivnan, David Schwandt, GWU	Boundary spanning activities in organizational learning
Karen Ayas	Young leaders' forum in Asia: Learning about leadership, abundance, and growth
Brad Rassler	"A sustainable way": transformative leadership development in environmentally sustainable, socially responsible business practice
Betty Ann Rafuse, Doug Lawson, Sanofi-Synthelabo, Canada Inc.	"What competencies are needed to support and create hypergrowth forecasted for the next three to five years?," related questions
Marty Finkle, AT&T	Global implementation of e-CRM system—impact on organization
David Schwandt, Marshall Sashkin, Andrea Casey, Margaret Gorman, GWU	Bringing OL into change interventions; examples of research from the GWU Center
Sharon Drew Morgen	Human drivers of growth: beyond dialogue



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brought the top 100 managers to Costa Rica one year, and next-generation top leaders in this huge multinational to Iceland and Croatia in other years. These “growth journeys” prompted participants to get out of their “executive shells” in a back-to-basics human encounter, often in a natural setting. The experiences were intended to evoke deep introspection about what is important to them as people. Although naturally challenging and sometimes scary, the experiences promoted leadership capabilities by bringing a different perspective and purpose back into the business world. Overwater personally witnessed a marked difference in the dialogues among the top leaders following the Costa Rica trip, beyond anything he has experienced before.

Boldly pushing the envelope in leadership development practice, such as the Young Leaders’ Forum in Asia (presented by Karen Ayas), Unilever has begun research on “the human drivers of organizational success” (presented by Tim Munden). In a different vein, a group at the University of Massachusetts Memorial Medical Center (Paulette Seymour, Christine Klucznik, and Vince Pelote) presented a leadership development project guided by a solid, competency-based research component.

Another leadership session—Project LEAD—focused on mental models of leadership as both an individual and collective capability. LEAD involved collaborative research that was seeded at a germination session in the previous Greenhouse. Six SoL member organizations participated in this joint research. The focus is on the broader systemic view of leadership in each organization, and preliminary findings show the importance of examining the mental models of leadership and leadership development. Project LEAD has also generated important learning for its participants about the process of collaboration at each stage of the research: design, collecting data, analyzing, reporting, and interpreting. While this process takes longer, the knowledge created gets really infused into the organization, increasing the capability to act on it.

Integrated Infrastructures

This research topic owes much to a proposal submitted to the Greenhouse by a practitioner involved in a large, corporate, electronic customer relationship management (e-CRM) implementation, alert to the high probability that this major change will have unintended consequences for many parts of his system. Typical of a germination session, that exploratory conversation identified other participants and other organizations with similar concerns and interests.

One SoL member company is deeply invested in lean operating systems and is eager for research that would help support that work, while another is working on lean manufacturing and trying to overcome the fragmentation of related systems. Several are concerned about honoring the interdependencies among subsystems; others are interested in making their support systems more flexible and sustainable.

Further conversations at the liaison officers’ meeting of member companies following the Greenhouse nurtured the seeds that were planted at the Greenhouse; some of those seeds came from earlier liaison discussions. While a concrete plan is not yet defined, this group has identified an important area of shared interest and members have a commitment to some collaborative form of inquiry.

The emergence of “Integrated Infrastructures” as a research topic provides an excellent example of the germination sessions and the role of the Greenhouse for seeding and nurturing research projects across constituencies and organizations. Martin Finkle from AT&T proposed a session entitled “Global Implementation of e-CRM: Its Impact on the Whole System.” Finkle took the opportunity to bring his practical workplace concern into a larger community space where it could be collectively reframed as a research opportunity involving other practitioners and researchers.² “Integrated Infrastructures” is likely

to become the focus of a collaborative research effort, involving a substantial group of SoL member organizations.

Rigor and Relevance

The overarching theme chosen for Greenhouse III was “Rigor *and* Relevance,” a core concern of SoL research. Relevance focuses on the practicality of new knowledge and rigor focuses on its accuracy and generalizability. SoL seeks to be a cross-organizational community of practice whose members generate and share knowledge of relevance to other members through rigorous research. The theme may be perceived as calling for trade-offs, but our challenge is to maximize both values.

The Greenhouse provided some opportunities to probe more deeply into these issues with diverse examples. For example, systems thinking provides a rigorous method for analyzing public policies on global warming, a topic of the highest relevance. But how can this rigorous analysis be made to seem relevant to policy makers and voters who do not have access to such rigorous ways of thinking? Similarly, rigorous research methods are giving us better competency systems for leadership development programs, but these often do not satisfy the wish for transformational leadership. Different mental models come into play, and rigorous methods that work within one mental model must be re-evaluated before they are used for different purposes, for clients who use a different mental model. What kind of research can assess, with appropriate rigor and validity, a program such as Unilever’s “growth journeys”?

One of our greatest assets at SoL is an ability to focus collective attention on serious, deep, difficult issues in ways that lead people to feel more energized to take relevant action. A continuing commitment to rigor in our thinking and research need not drag us down into defeatism or irrelevance. We must continue to insist on both relevance and rigor.

This Greenhouse created the context that enabled many great conversations about important topics in organizational learning, and it brought more SoL members fully “into the game” of collaborative action research. It helped to advance the germination of some ideas and proposals for research, including the second phase of Project LEAD and the new Integrated Infrastructures project. These two topics form a major part of SoL’s emerging research agenda. A third candidate, unveiled at G3 and now awaiting further discussion, is the “human drivers of growth” proposal, rooted in the two Unilever presentations from Munden and Overwater.

As articulated by the SoL Research Committee, the vision for research at SoL is that every organizational member should be engaged in projects to improve its organizational learning *and* engaged in research and assessment to strengthen its improvement and learning process. The Greenhouse once again served as a good venue and vehicle for creating and sharing new knowledge (know-how, methods and tools, and theory) about organizational learning and transformation, helping SoL to be an effective community of practice and learning.

Acknowledgments

George Washington University, specifically, the faculty and students of the Executive Leadership Doctoral Program and the Center for the Study of Learning, hosted and co-sponsored Greenhouse III at its northern Virginia campus, October 27–29, 2002. Many thanks to David Schwandt, program and center director, and to Margaret Delaney Gorman, executive director, for their contributions to the venture’s success. We are grateful for the bright energy of the doctoral student participants who took thoughtful notes during all sessions and helped to staff the conference.

Greenhouse program information can be found on the SoLonline.org website, including a list of presenters and topics, their material, and some discussion notes in the form of handouts, slides, and video (for some plenary sessions only). Search by title, name of presenter, or “G3.” The SoL web-based archive also includes substantial material from the two earlier Greenhouses.

Notes

1. Paper coauthored by John Sterman and Linda Booth Sweeney and available on the SoL website.
2. The challenge in wording one of these proposals is simultaneously to identify a practical concern that will be shared by other practitioners and to show the possibility for an interesting role where researchers can contribute. What is needed is not to fully define the problem but just to show how it has potential for those who might help proposal writers find something rewarding for themselves at the same time. Helping define the problem better may be where the collaboration starts.

Commentary

by *David R. Schwandt*



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Reflecting on the Greenhouse is a difficult and rewarding task. The difficulty stems from the diversity of the presentations and the depth that each manifested. My initial expectations were that this would be a conference of "beginning" ideas. However, as is true with a botanical greenhouse, this greenhouse displayed ideas at all stages of development, yet commonly characterized by a sincere request for input by the presenters. This variety of topics and passion for inquiry form the basis of my difficulty and rewards. However, three ideas remain with me.

First, the interest that was voiced concerning the development of leaders and managers seems to have evolved from the traditional "let's identify competencies" to an emphasis on context of leadership and management. The conference voices reflected a leadership continuum that ranged from individual development, shown by Loghdey, Alexander, and LeRoux, to collective, intercultural leadership, depicted by Overwater. The themes reflected in these presentations represented (1) the acknowledgment of a highly complex, socially created leadership context; (2) incorporation of action learning experiences that make cross-cultural differences obvious and important; and (3) a concern for the ethical foundations of organizations, both for-profit and not-for-profit. The papers and ideas reflect a philosophy that supports leadership development as more than mastery of a set of individual competencies, but rather leadership as a social phenomenon required for social structure, meaningful work, and individual dignity in a community. Leadership is not seen as "something you do to someone else."

Second, the range of applicability of concepts put forward at the conference ranged from the very micro to the macro social levels. The use of systems thinking and systems dynamics was evident in the analysis of learning in the multidisciplinary teams, as presented by Crosswell, Kayes, and Brown. In this example, improvisation by the system (team) is seen as a function of the interactions around language and social norms. This same dependence in social interactions and language was evident in the macro issue of global warming. Sterman's systems dynamics analysis of the "science" of global warming was well positioned in the context of the social dynamics of learning. This macro issue of information management was also the focus of systems thinking as demonstrated by Finkle in the discussion of the global implementation of e-CRM.

Last, an issue that was not the explicit focus of any one presentation but was implicit in the work that is being accomplished is the relative orientation of the world. When organizations study leadership, communications, or systems analysis, do we approach them from a "research" framework or from an "advocate" frame? Is there a line between these two orientations that can be crossed over? These can be difficult questions because of many factors such as a client's pragmatic need to solve problems, our need to promote a specified philosophy or worldview, and, of course, the field's need to experiment and create knowledge. The action learning process seems to be one of the better orientations to this dilemma. The expectations for solutions are integrated with the methods of inquiry and represented by the many papers that were presented at the conference and also reflect SoL's underlying theory of knowledge.

These three ideas—leadership development, cross-level analysis, and action learning—appear to be strands of thought that permeated the proceedings. They were present not only in the substance but also in the spirit of the participants' interactions. In this way, the conference lived in the ideas of learning and knowledge creation.

Commentary

by Tova Olson

Knowledge creation as a continuous and evolving process seems to be at the heart of SoL. Collaboration among researchers, managers, and consultants is central to this process, and as student volunteers for the SoL Greenhouse III, we learned, firsthand, the advantages of enlisting multiple, varied perspectives and creating a context that allows for knowledge creation.

As doctoral students who assisted in facilitating the conference, our volunteer responsibilities evolved into a meaningful, contributing role. We served as facilitators, conveners, and summarizers. However, our most important role was as collaborative learners in the SoL community.

Our assigned primary role was to assist in the germination sessions, the smaller and more interactive discussions. A presenter who was genuinely interested in creating a context in which participants could explore and develop ideas facilitated each session. We were actively engaged in this exploration, and through this experience, we learned about topics ranging from leadership to action learning.

Following each germination session, we could further reflect on our ideas and share collaborative learning with other conference participants. With a student partner, we developed conceptual maps depicting the themes that emerged from each session. These visual maps, which we shared with other participants, later became the basis for the concluding plenary sessions. Through this process, we learned how intentional efforts to share knowledge can result in more fruitful conversations. We witnessed how participants identified important areas of shared interest both within the sessions and in the ensuing conversations. Our visual maps sparked conversations that allowed collaboration to continue during breaks and meals, and we recognized how our small efforts could greatly benefit an entire organization.

In addition to learning through reflection and conversation, we also learned by observing the already established partnerships among SoL members. The conference participants included a wide range of scholars, managers, and consultants. Most impressive was the genuine interest all participants showed in each topic. Participants seemed to challenge themselves to attend sessions outside their specific area of interest or research, and wonderful opportunities for collaboration emerged. As students or future organizational learning practitioners, we were included in the SoL community and began to develop relationships that will help us to continue to explore our areas of interest.

Finally, we learned from the conference designers the importance of flexibility in any learning context. The design committee established a culture in which flexibility was not only encouraged, but expected. It was not uncommon to see session facilitators diverge from the topic at hand to follow the group's interests. In addition, as topics emerged, groups with shared interests held informal sessions. Finally, the agenda for the conference continued to evolve throughout the process to meet the needs of presenters, facilitators, and the group as a whole. Although challenging at times, what resulted was a context in which ideas could be followed and developed as they emerged.

SoL created the context for knowledge creation and learning. As student participants, we came away with increased enthusiasm, an appreciation of the impact of collaboration, and, most important, the beginning of relationships with other scholars, managers, and consultants.



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