

Reflections

The SoL Journal
on Knowledge, Learning, and Change

SoL
15+ Years



Part One Foundational Documents

From Fragmentation to Integration: Building Learning Communities

Peter Senge and Daniel H. Kim

Organizational Transformation from the Inside Out: Reinventing the MIT Center for Organizational Learning

Jeff Clanon

Scenarios 2000: Four Futures for Organizing and Leading in the New Economy

Art Kleiner

The Marblehead Letter

Global SoL Network Stewards

Part Two Lessons, Failures, Frontiers

30 Years of Building Learning Communities

A Dialogue with Peter Senge,
Otto Scharmer, and Darcy Winslow

Part Three Listening to the Field

Voices from the Community

PUBLISHER'S NOTE 12.4



Frank Schneider

Welcome to this special issue of *Reflections*. In 2012, the Society for Organizational Learning celebrated its 15th anniversary. In honor of that milestone, we look at SoL's journey, from its roots in a program called "Systems Thinking and the New Management Style" to the formation of the MIT Organizational Learning Center in the early 1990s to the foundation of the Society for Organizational Learning in 1997. It is a story told by many of those involved in the on-the-ground efforts undertaken to establish and sustain this truly unique organization. The voices you will hear are just a sampling of the many people who not only have been and continue to be central to SoL's development and evolution but also demonstrate their commitment to its values and principles in how they live their lives.

The voices you will hear are just a sampling of the many people who not only have been and continue to be central to SoL's development and evolution but also demonstrate their commitment to its values and principles in how they live their lives.

Part One, Foundational Documents, comprises seminal articles and correspondence from SoL's early years. With contributions from academics, consultants, and business leaders, these documents provide a historical, social, and philosophical context for SoL's growth as a global learning network.

In "From Fragmentation to Integration: Building Learning Communities," Peter Senge and Daniel H. Kim discuss

the widespread failure of organizations to adequately integrate research, capacity building, and practice. They make the case that, without this integration or a way to diffuse knowledge, organizations and communities can achieve only incremental improvement.

Jeff Clanon's article, "Organizational Transformation from the Inside Out: Reinventing the MIT Center for Organizational Learning," recounts the birth of SoL, when its founders decided to create a freestanding entity separate from MIT. Jeff's clarity of thought and insight into this process are key to understanding SoL as we know it today. In providing a summary of the lessons learned from the arduous process of self-identity, this piece also has profound implications for achieving fundamental change in any modern organization.

The third foundational document that we have chosen to include, "Scenarios 2000: Four Futures for Organizing and Leading in the New Economy," was created by a group of 20 SoL members and invited guests, which included religious leaders, Fortune 500 executives, academics, environmentalists, and community activists. The intent of the conveners was to introduce new perspectives by creating bold scenarios that could lead to "unexpected insights" for SoL members. The participants hoped that these insights would have positive impact on the work that SoL would do in the future. The scenarios, reprinted in condensed form here, also raise fundamental issues of human identity.

The "Marblehead Letter, October 2001," written by a group of representatives from corporations sponsoring the development of the Global SoL Network, was an open invitation to all members of the SoL community to reflect on major issues shaping the strategic context for businesses around the world. We have included it because it was one of SoL's first efforts to establish a vision for the organization in terms of what it could focus on and the challenges it might be able to address. The meeting that led to the letter was also a strong example of the opportunity to "think together," an activity that

this forward-thinking group believed was essential for developing new capacities in an environment of “perpetual doing.”

In *Part Two, Lessons, Failures, and Frontiers*, Peter Senge, Otto Scharmer, and Darcy Winslow, representing SoL, the Presencing Institute, and the Academy for Systemic Change, reflect on “30 Years of Building Learning Communities.” The purpose of this dialogue was to provide these thought leaders an opportunity to reflect deeply about the essential role of networks and communities of collaboration in addressing systemic global issues. Taken in its entirety, the dialogue focuses on the importance of shifting from “ego-system” – or individual – awareness to “eco-system” – or collective – awareness in effecting sustainable change. It is interesting to note that, throughout the conversation, Peter, Otto, and Darcy refer to SoL’s own capacity to adapt and sustain as a microcosm of every system’s struggle to do the same.

SoL would not exist without you, its members. In a small way, *Part Three, Voices from the Community*, pays tribute to your contributions and to your collective and individual commitment to SoL’s vision and purpose. Although we would like to have published contributions from all members, we believe that the pieces we have included represent a broad swath of the diverse communities that make up SoL. We were delighted by the diversity of perspective and insight we received in response to the questions provided to help frame the contributors’ reflections. At the same time, we were struck by the commonality of purpose and depth of commitment to SoL’s vision and principles that these prompts elicited. As you read this section, it should come as no surprise that members of SoL want nothing less than for the SoL community to be *the* global presence that stewards a sustainable and healthy future for all of humankind.

As you read through this issue, we invite you to reflect on your own journey over the last years as a leader,

We invite you to reflect on your own journey over the last years as a leader, community member, and human being. What’s the story of your life, what has been important to you, what have you aspired to, what roads have you taken (and which ones have you not followed)?

community member, and human being. What’s the story of your life, what has been important to you, what have you aspired to, what roads have you taken (and which ones have you not followed), and what has brought you to *Reflections* and to the SoL community? After all, it is the people who engage with one another who make SoL the community it is today: a reflective global learning community that we all see as a space and breeding ground to bring about bright, sustainable, and inspiring futures for ourselves and for the world. This issue of *Reflections* invites you to join us in writing the next 15 years.

Photographs

Unlike other issues of *Reflections*, the photographs here are not necessarily intended to represent or reflect the content; rather, they are meant to inspire and delight. For this special issue, Michael Goodman, a founding member of SoL and a charter member of the System Dynamics Society, generously granted us permission to publish selected images from his expansive collection. We think they are spectacular and beautifully complementary, in tone and in spirit, to this special issue. We hope that you will, too. ■



Frank Schneider, *Publisher*

EXECUTIVE DIGEST 12.4

Part One: Foundational Documents

We have chosen to begin this special issue of *Reflections* by reprinting selected foundational documents that collectively provide a retrospective on the origins of the Society for Organizational Learning and on the key phases of its evolutionary journey. Written by academics, consultants, and business leaders centrally involved in establishing SoL, these artifacts provide a historical, social, and philosophical context for appreciating and understanding what it takes to initiate, invent, commit to, and collaborate in sustaining an organization of SoL's breadth of vision and depth of commitment to organizational learning and global systemic change.

From Fragmentation to Integration: Building Learning Communities

Peter Senge and Daniel H. Kim

At the time that this article appeared in *The Systems Thinker* in 1997, a small group of researchers, consultants, and corporate executives was working to create the Society for Organizational Learning as an independent entity. We have included this piece because it addresses one of the key issues that prompted that original group to initiate the undertaking: the fragmentation that was preventing MIT's Center for Organizational Learning from achieving its core purpose of advancing organizational learning. The OLC's struggle to overcome that fragmentation represents a microcosm of the widespread institutional failure that Senge and Kim address in this article. For them, organizational learning requires a commitment to integrating research, capacity building, and practice. It also relies on a community dedicated to diffusion rather than isolation of knowledge. Absent these elements, they argue, the most an organization can achieve is incremental improvement in which learning cannot be maximized or sustained.

Organizational Transformation from the Inside Out: Reinventing the MIT Center for Organizational Learning

Jeff Clanon

This 1999 article traces the two-year change process (from 1995 to 1997) undertaken at the MIT Center for Organizational Learning, the result of which was a newly formed, self-governed, non-profit membership organization known today as the Society for Organizational Learning. Jeff Clanon, former director of Partnership Development for SoL, describes the context and reasons for the process, the conceptual models that guided it, and the results. For Jeff, working on the redesign and eventual reinvention of the Center was an opportunity to experience first-hand the inherent challenges of a transformative change effort. We have included this piece as a foundational document because not only does it tell the story of the birth of SoL and lessons learned from the arduous process, but it also has implications for any modern organization seeking to achieve fundamental change.

Scenarios 2000: Four Futures for Organizing and Leading in the New Economy

Art Kleiner

In 2000, a group of 20 individuals – members of SoL as well as non-members including religious leaders, Fortune 500 executives, academics, environmentalists, community activists, and others – convened for the purpose of bringing to SoL members new perspectives that could lead to “unexpected insights” which in turn could influence both individual and collective thinking and ultimately the future of SoL's work around the globe. The resulting scenarios describe four distinct future worlds in which technology, corporations, multi-cultural reformation, and world decay prevail. We have included a condensed version of the original scenarios. Although some of the projections haven't come to pass, when reflected upon collectively, these scenarios raise fundamental issues about human identity and the role of community in our

EXECUTIVE DIGEST 12.4

collective future. We have also included a retrospective Commentary by Adam Kahane, who helped to facilitate the original process.

The Marblehead Letter

Global SoL Network Stewards

This letter, written in 2001 by representatives from corporations who sponsored the development of the Global SoL Network, served as an invitation to the SoL community to participate in reflecting on the major issues shaping the strategic context for all companies. By organizing an international conversation, known as the SoL Leadership Dialogues, these stewards of the Global SoL Network provided a kind of holding environment in which leaders from around the world had the rare opportunity to genuinely “think together.” They believed that sustaining the opportunity for reflection in an environment of perpetual doing was essential to developing new capacities for shared understanding and coordinated action in the face of increasingly complex issues that challenged them individually and collectively.

Part Two: Lessons, Failures, Frontiers

30 Years of Building Learning Communities

A Dialogue with Peter Senge, Otto Scharmer, and Darcy Winslow

Although the Society for Organizational Learning was founded 15+ years ago, its roots go back almost 30 years. In this conversation, Peter Senge, Otto Scharmer, and Darcy Winslow look back at SoL’s earliest form as a single program (“Systems Thinking and the New Management Style”) and its evolution to its current state. In addition, they reflect on the role of individuals in systemic change, the ways in which we can leverage our impact as individuals and communities, and the essential role of cooperation and collaboration in sustainable organizational and global change. They consider what it takes to shift from “ego-system

awareness” to “eco-system awareness,” a shift they agree is fundamental to effecting sustainable change. Throughout the conversation, references to SoL’s own capacity for development, and the evolution of related networks like the Presencing Institute, serve as a microcosm of every system’s struggle to adapt and sustain itself.

Part Three: Listening to the Field

Voices from the Community

In October 2012, we sent a set of questions to members representing SoL’s diverse constituencies. The intent was to give respondents the opportunity not only to share but also to celebrate the benefits and achievements they have enjoyed as members of this extraordinary organization. Our hope was that their responses would provide a rich array of stories and experiences demonstrating SoL’s value. They did not disappoint. We were delighted, but not surprised, to learn first-hand of the commonality of purpose and depth of commitment to SoL’s vision and principles that characterized each response. Perhaps most heartening and uplifting were people’s responses to the question, “*What are your highest aspirations for SoL?*” SoL members, it seems, want nothing less than for its organization to be *the* global presence that stewards a sustainable and healthy future for all of humankind.



Chronology of Growth

- 1978** Robert Fritz, Charles Kiefer, and Peter Senge create “Leadership and Mastery,” a three-day executive education seminar that integrates the concepts and disciplines of vision, purpose, alignment, and systems thinking.
- 1984** Peter Senge convenes a semi-annual forum at MIT for CEO-level dialogue entitled “Systems Thinking and the New Management Style.”
- 1987** “Systems Thinking and Organizational Learning” project is founded at MIT.
- 1988** Early experiments with learning laboratories are begun.
- 1989** A two-day meeting of the CEO group from the semi-annual forum meets with Bill Isaacs, Daniel Kim, and Peter Senge to discuss the creation of a larger learning alliance. Seeds for the MIT Organizational Learning Center (OLC) are planted.
- 1990** *The Fifth Discipline* is published. Corporate members decide to launch OLC as an interdisciplinary research center to be housed at MIT’s Sloan School.
- 1991** Interest in *The Fifth Discipline* grows. Companies join OLC as corporate partners and enlarge the collaborative consortium. Projects called “learning labs” are developed at Harley-Davidson, Ford, and Federal Express. OLC Core Competency Courses begin. The OLC grows and has 19 sponsoring corporate partners.
- 1994** A review of OLC is commissioned by the MIT Sloan School.
- 1995** OLC commits itself to a redesign as a networked alliance.
- 1997** The Society for Organizational Learning (SoL) incorporated as a not-for-profit and relocates. SoL is to be governed by a council representing its three primary member constituencies: organizations, consultants, researchers. The first SoL annual meeting is held and first governing council is elected.

From the learning history of the Society for Organizational Learning by Hilary Bradbury

PART ONE

Foundational Documents

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FEATURE 12.4

From Fragmentation to Integration: Building Learning Communities

PETER SENGE AND DANIEL H. KIM

At the time that this article appeared in *The Systems Thinker* in 1997, a small group of researchers, consultants, and corporate executives was working to create the Society for Organizational Learning as an independent entity. We have included this piece because it addresses one of the key issues that prompted that original group to initiate the undertaking: the fragmentation that was preventing MIT's Center for Organizational Learning from achieving its core purpose of advancing organizational learning. The OLC's struggle to overcome that fragmentation represents a microcosm of the widespread institutional failure that Senge and Kim address in this article. For them, organizational learning requires a commitment to integrating research, capacity building, and practice. It also relies on a community dedicated to diffusion rather than isolation of knowledge. Absent these elements, they argue, the most an organization can achieve is incremental improvement in which learning cannot be maximized or sustained.



Peter Senge



Daniel H. Kim

"We live in an era of massive institutional failure," says Dee Hock, founder and CEO emeritus of Visa International. We need only look around us to see evidence to support Dee's statement. Corporations, for example, are spending millions of dollars to teach high-school graduates in their workforces to read, write, and perform basic arithmetic. Our healthcare system is in a state of acute crisis. The U.S. spends more on healthcare than any other industrialized country, and yet the health of our citizens is the worst among those same nations. Our educational system is increasingly coming under fire for not preparing our children adequately to meet the demands of the future. Our universities are losing credibility. Our religious institutions are struggling to maintain relevance in people's lives. Our government is increasingly dysfunctional, caught in a vicious cycle of growing special interest groups, distrust, and corruption. The corporation may be the healthiest institution in the U.S. today, which isn't saying much.

One of the reasons for this widespread institutional failure is that the *knowledge-creating system*, the method by which human beings collectively learn and by which society's institutions improve and revitalize themselves, is deeply fragmented. This fragmentation has developed so gradually that few of us have noticed it; we take the disconnections between the branches of knowledge and between knowledge and practice as a given.

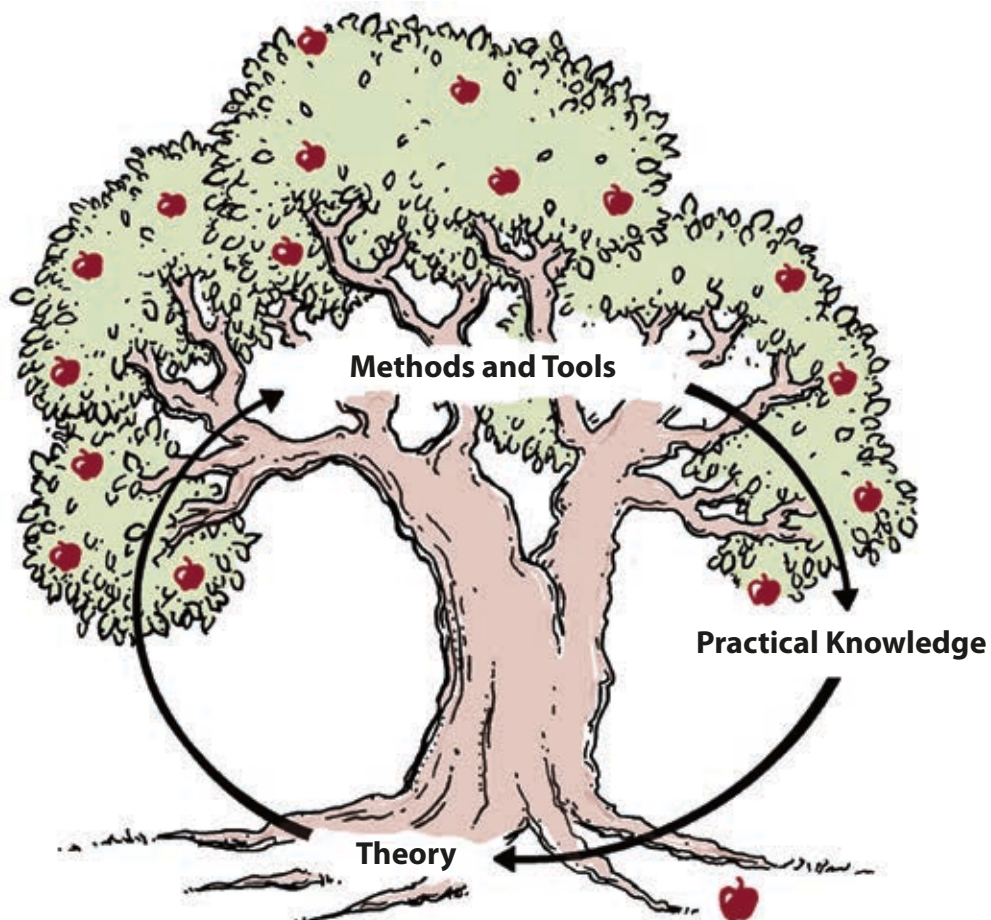
One of the reasons for widespread institutional failure is that the knowledge-creating system, the method by which human beings collectively learn and by which society's institutions improve and revitalize themselves, is deeply fragmented.

A Knowledge-Creating System

Before we can address the issue of fragmentation, we need to establish what has been fragmented. In other words, what do we mean by a knowledge-creating system, and what does it mean to say it is fragmented?

We believe that human communities have always attempted to organize themselves to maximize the production, transmittal, and application of knowledge. In these activities, different individuals fulfill different roles, with varying degrees of success. For example, in

FIGURE 1 **The Cycle of Knowledge Creation**



Like theories, the tree's roots are invisible, and yet the health of the root system determines the health of the tree. The branches are the methods and tools, which enable translation of theories into new capabilities and practical results. The fruit is that practical knowledge. The tree as a whole is a system.

indigenous cultures, elders articulate timeless principles grounded in their experience to guide their tribes' future actions. "Doers," whether warriors, growers, hunters, or nannies, try to learn how to do things better than before and continually improve their craft. And coaches and teachers help people develop their capacities to both perform their roles and grow as human beings. These three activities – which we can term theory-building, practice, and capacity-building – are intertwined and woven into the fabric of the community in a seamless process that restores and advances the knowledge of the tribe. One could argue that this interdependent knowledge-creating system is the only way that human beings collectively learn, generate new knowledge, and change their world.

We can view this system for producing knowledge as a cycle. People apply available knowledge to accomplish their goals. This practical application in turn provides experiential data from which new theories can be formulated to guide future action. New theories and principles then lead to new methods and tools that translate theory into practical know-how, the pursuit of new goals, and new experience – and the cycle continues.

Imagine that this cycle of knowledge creation is a tree (Figure 1). The tree's roots are the theories. Like theories, the roots are invisible to most of the world, and yet the health of the root system to a large extent determines the health of the tree. The branches are the methods and tools, which enable translation of theories into new capabilities and practical results. The fruit is that practical knowledge. In a way, the whole system seems designed to produce the fruit. But, if you harvest and eat all the fruit from the tree, eventually there will be no more trees. So, some of the fruit must be used to provide the seeds for more trees. The tree as a whole is a system.

The tree is a wonderful metaphor, because it functions through a profound, amazing transformational process called photosynthesis. The roots absorb nutrients from the soil. Eventually, the

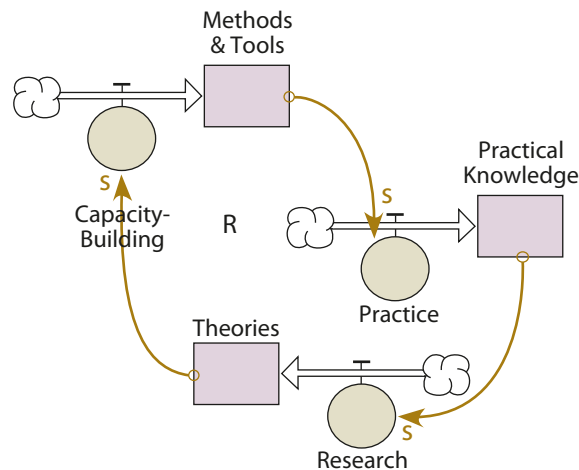


nutrients flow through the trunk and into the branches and leaves. In the leaves, the nutrients interact with sunlight to create complex carbohydrates, which serve as the basis for development of the fruit.

So, what are the metaphorical equivalents that allow us to create fruits of practical knowledge in our organizations? We can view research activities as expanding the root system to build better and richer theories. Capacity-building activities extend the branches by translating the theories into usable methods and tools. The use of these methods and tools enhances people's capabilities. The art of practice in a particular line of work transforms the theories, methods, and tools into usable knowledge as people apply their capabilities to practical tasks, much as the process of photosynthesis converts the nutrients into leaves, flowers, and fruit. In our society,

- **Research** represents any disciplined approach to discovery and understanding with a commitment to share what's being learned. We're not referring to white-coated scientists performing laboratory experiments; we mean research in the same way that a child asks, "What's going on here?" By pursuing such questions, research – whether performed by academics or

FIGURE 2
The Stocks and Flows of Knowledge Creation

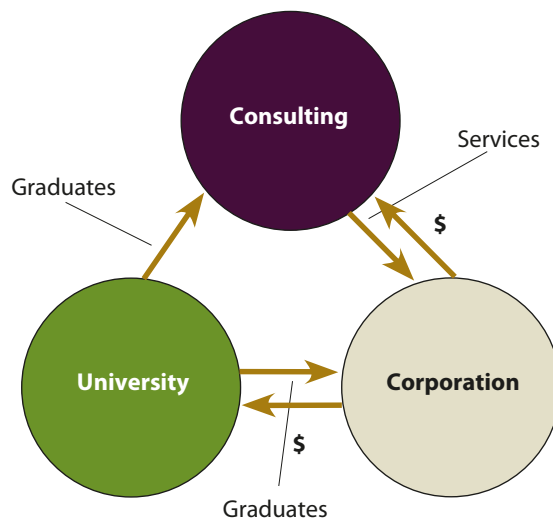


Research activities build better and richer theories. Capacity-building functions translate the theories into usable methods and tools. The use of these methods and tools enhances people's capabilities. The art of practice transforms the theories, methods, and tools into practical knowledge.

- thoughtful managers or consultants reflecting on their experiences – continually generates new theories about how our world works.
- Practice** is anything that a group of people does to produce a result. It's the application of energy, tools, and effort to achieve something practical. An example is a product development team that wants to build a better product more quickly at a lower cost. By directly applying the available theory, tools, and methods in our work, we generate practical knowledge.
- Capacity-building** links research and practice. It is equally committed to discovery and understanding and to practical know-how and results. Every learning community includes coaches, mentors, and teachers – people who help others build skills and capabilities through developing new methods and tools that help make theories practical.

"The Stocks and Flows of Knowledge Creation" (Figure 2) shows how the various elements are linked together in a knowledge-creating system.

FIGURE 3
The Fragmentation of Institutions



Because research, practice, and capacity-building each operate within the walls of separate institutions, the people within these institutions feel cut off from each other, leading to suspicion, stereotyping, and an "us" versus "them" mindset.

Institutionalized Fragmentation

If knowledge is best created by this type of integrated system, how did our current systems and institutions become so fragmented? To answer that question, we need to look at how research, practice, and capacity-building are institutionalized in our culture. (See "The Fragmentation of Institutions," Figure 3.)

For example, what institution do we most associate with research? Universities. What does the world of practice encompass? Corporations, schools, hospitals, and nonprofits. And what institution do we most associate with capacity-building – people helping people in the practical world? Consulting, or the HR function within an organization. Each of these institutions has made that particular activity its defining core. And, because research, practice, and capacity-building each operate within the walls of separate institutions, it is easy for the people within these institutions to feel cut off from each other, leading to suspicion, stereotyping, and an "us" versus "them" mindset.



This isolation leads to severe communication breakdown. For example, many people have argued that the academic community has evolved into a private club. Nobody understands what's going on but the club members. They talk in ways that only members can understand. And the members only let in others like themselves.

Consulting institutions have also undermined the knowledge-creating process, by making knowledge proprietary, and by not sharing what they've learned. Many senior consultants have an incredible amount of knowledge about organizational change, yet they have almost no incentive to share it, except at market prices.

Finally, corporations have contributed to the fragmentation by their bottom-line orientation, which places the greatest value on those things that produce immediate, practical results. They have little patience for investing in research that may have payoffs over the long term or where payoffs cannot be specifically quantified.

Technical Rationality: One Root of Fragmentation

How did we reach this state of fragmentation? Over hundreds of years, we have developed a

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notion that knowledge is the province of the expert, the researcher, the academic. Often, the very term *science* is used to connote this kind of knowledge, as if the words that come out of the mouths of scientists are somehow inherently more truthful than everyone else's words.

Donald Schön has called this concept of knowledge "technical rationality." First you develop the theory, then you apply it. Or, first the experts come in and figure out what's wrong, and then you use their advice to fix the problem. Of course, although the advice may be brilliant, sometimes we just can't figure out how to implement it.

But maybe the problem isn't in the advice. Maybe it's in the basic assumption that this method is how learning or knowledge creation actually

Society for Organizational Learning

The Center for Organizational Learning (OLC) at the Massachusetts Institute of Technology has gone through a transformational process to enhance knowledge-creation that may serve as a model for other organizations.

The OLC was founded in 1991 with a mission of fostering collaboration among a group of corporations committed to leading fundamental organizational change and advancing the state-of-the-art in building learning organizations. By 1995, the consortium included 19 corporate partners. Many of these partners teamed with researchers at MIT to undertake experiments within their organizations. Numerous learning initiatives were also “self-generating” within the member corporations.

Over time, we came to understand that the goals and activities of such a diverse learning community do not fit into any existing organizational structure, including a traditional academic research center. We also recognized the need to develop a body of theory and models for organizing for learning, to complement the existing theories and methods for developing new learning capabilities.

So, over the past two years, a design team drawn from the OLC corporate partners and MIT, and including several senior consultants, engaged in a process of rethinking our purpose and structure. Dee Hock has served as our guide in this process. Many of these new thoughts about building a knowledge-creating community emerged from this rethinking. At one level, this process was driven by the same kind of practical, pressing problems that drive corporations to make changes; many of these challenges stemmed

from the organization’s growth. But throughout the whole redesign process, what struck us most was that the OLC’s most significant accomplishment was actually the creation of the OLC community itself.

In April 1997, the OLC became the Society for Organizational Learning (SoL), a nonprofit, member-governed organization. SoL is designed to bring together corporate members, research members, and consultant members in an effort to invigorate and integrate the knowledge-creating process. The organization is self-governing, led by a council elected by the members – a radical form of governance for a nonprofit organization. In addition, SoL is a “fractal organization”; that is, the original SoL will eventually be part of a global network of “SoL-like” consortia.

SoL will undertake four major sets of activities:

- **Community-building activities** to develop and integrate the organization’s three membership groups and facilitate cross-community learning;
- **Capacity-building functions** to develop new individual and collective skills;
- **Research initiatives** to serve the whole community by setting and coordinating a focused research agenda; and
- **Governance processes** to support the community in all its efforts.

SoL is a grand experiment to put into practice the concept of learning communities outlined in this article. We all hope to learn a great deal from this process and to share those learnings as widely as possible.

works. Maybe the problem is really in this very way of thinking: that first you must get “the answer,” then you must apply it.

The implicit notion of technical rationality often leads to conflict between executives and the front-line people in organizations. Executives often operate by the notion of technical rationality: In Western culture, being a boss means having all the answers. However, front-line people know much more than they can ever say about their jobs and about the organization. They actually have the capability to do something, not just *talk* about something. Technical rationality is great if all you ever have to do is talk.

Organizing for Learning

If we let go of this notion of technical rationality, we can then start asking more valuable questions, such as:

- How does real learning occur?
- How do new capabilities develop?
- How do learning communities that interconnect theory and practice, concept and capability come into being?
- How do they sustain themselves and grow?
- What forces can destroy them, undermine them, or cause them to wither?

Clearly, we need a theory, method, and set of tools for organizing the learning efforts of groups of people.

Real learning is often far more complex – and more interesting – than the theory of technical rationality suggests. We often develop significant new capabilities with only an incomplete idea of how we do what we do. As in skiing or learning to ride a bicycle, we “do it” before we really understand the actual concept. Similarly, practical know-how often precedes new principles and general methods in organizational learning. Yet, this pattern of learning can also be problematic.

For example, teams within a large institution can produce significant innovations, but this new knowledge often fails to spread. Modest improvements may spread quickly, but real breakthroughs are difficult to diffuse. Brilliant innovations won’t spread if there is no way for them to spread; in





We believe that the absence of effective learning communities limits our ability to learn from each other, from what goes on within the organization, and from our most clearly demonstrated breakthroughs.

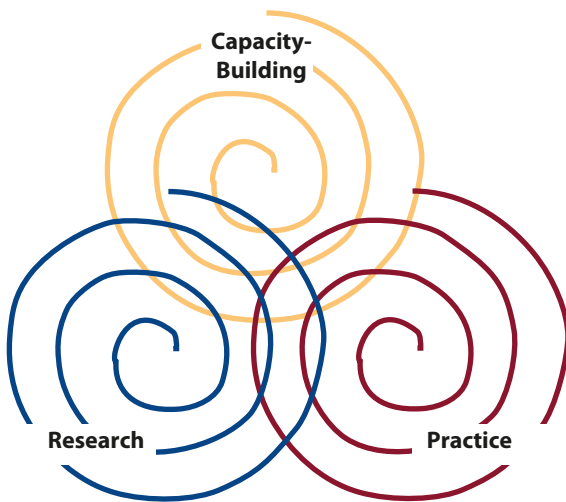
other words, if there is no way for an organization to extract the general lessons from such innovations and develop new methods and tools for sharing those lessons. The problem is that wide diffusion of learning requires the same commitment to research and capacity-building as it does to practical results. Yet few businesses foster such commitment. Put differently, organizational learning requires a *community* that enhances research, capacity-building, and practice. (See “Society for Organizational Learning” box, page 8.)

Learning Communities

We believe that the absence of effective learning communities limits our ability to learn from each other, from what goes on within the organization, and from our most clearly demonstrated breakthroughs. Imagine a learning community as a group of people that bridges the worlds of research, practice, and capacity-building to produce the kind of knowledge that has the power to transform the way we operate, not merely make incremental improvements. If we are interested in innovation and in the vitality of large institutions, then we are interested in creating learning communities that *integrate* knowledge instead of fragment it.

In a learning community, people view each of the three functions – research, capacity-building, practice – as vital to the whole. (See “A Learning Community,” Figure 4.) Practice is crucial because it produces tangible results that show that the community has learned something. Capacity-

FIGURE 4
A Learning Community



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building is important because it makes improvement possible. Research is also key because it provides a way to share learning with people in other parts of the organization and with future generations within the organization. In a learning community, people assume responsibility for the knowledge-creating process.

Learning Communities in Action

To commit to this knowledge-creating process, we must first understand what a learning community looks like in action in our organizations. Imagine a typical change initiative in an organization; for example, a product development team trying a new approach to the way they handle engineer-

ing changes. Traditionally, such a team would be primarily interested in improving the results on their own projects. Team members probably wouldn't pay as much attention to deepening their understanding of why a new approach works better, or to creating new methods and tools for others to use. Nor would they necessarily attempt to share their learnings as widely as possible – they might well see disseminating the information as someone else's responsibility.

In a learning community, however, from the outset, the team conceives of the initiative as a way to maximize learning for itself as well as for other teams in the organization. Those involved in the research process are integral members of the team, not outsiders who poke at the system from a disconnected and fragmented perspective. The knowledge-creating process functions in real time within the organization, in a seamless cycle of practice, research, and capacity-building.

Imagine if this were the way in which we approached learning and change in all of our major institutions. What impact might this approach have on the health of any of our institutions, and on society as a whole? Given the problems we face within our organizations and within the larger culture, do we have any choice but to seek new ways to work together to face the challenges of the future? We believe the time has come for us to begin the journey back from fragmentation to wholeness and integration. The time has come for true learning communities to emerge. ■

ABOUT THE AUTHORS

Peter M. Senge is the author of *The Fifth Discipline: The Art and Practice of the Learning Organization*, co-author of *The Necessary Revolution and Presence*, and founding chair of the Society for Organizational Learning.

Daniel H. Kim is co-founder of Pegasus Communications, founding publisher of *The Systems Thinker* newsletter, and a consultant, facilitator, teacher, and public speaker committed to helping problem-solving organizations transform into learning organizations.

Editorial support for this article was provided by Janice Molloy and Lauren Johnson.

FEATURE 12.4

Organizational Transformation from the Inside Out: Reinventing the MIT Center for Organizational Learning

JEFF CLANON

This 1999 article traces the two-year change process (from 1995 to 1997) undertaken at the MIT Center for Organizational Learning, the result of which was a newly formed, self-governed, non-profit membership organization known today as the Society for Organizational Learning. Jeff Clanon, former director of Partnership Development for SoL, describes the context and reasons for the process, the conceptual models that guided it, and the results. For Jeff, working on the redesign and eventual reinvention of the Center was an opportunity to experience first-hand the inherent challenges of a transformative change effort. We have included this piece as a foundational document because not only does it tell the story of the birth of SoL and lessons learned from the arduous process, but it also has implications for any modern organization seeking to achieve fundamental change.



Jeff Clanon

No management issue has generated more attention and experimentation over the past two decades than how organizations can successfully initiate and sustain change. Yet the process of actually transforming an organization – that is, changing not only the organization's structure and practices, but also the thinking and the quality of interaction among the people who comprise it – is still not widely understood, and, in fact, remains a relatively rare occurrence.

Many organizations are engaged in efforts to improve performance by some combination of accelerating innovation, operating more efficiently, containing costs, becoming more agile, focusing on the customer, and improving employee morale. Despite all this effort, as VISA co-founder Dee Hock points out, we still have an epidemic of institutions that are unable to achieve their purpose: schools that cannot teach, unhealthy healthcare systems, welfare systems in which few fare well, communities that can't communicate, corporations that cannot cooperate or compete, and governments that cannot govern.¹

Not unlike many other organizations, the MIT Center for Organizational Learning was ill prepared for its success.



My own early experience with organizational change is perhaps not atypical. Working for a large, high-tech corporation, I participated in a dozen or so change efforts over a 15-year period. My sense was that all that really changed was the organization's formal structure and the span of control of a few managers. More fundamental issues, such as the desired increase in business performance, the quality of daily interactions, and how people felt about working for the company, remained remarkably unchanged. In fact, employee morale usually decreased following each effort. The joke became, "If you don't know what to do – reorganize!"

As a result of these experiences, I became increasingly skeptical about whether "transformation" in an organizational context was even possible. Paradoxically, they also generated in me a deep desire to understand how meaningful and sustainable change can occur in organizational settings, and why it is so difficult to achieve.

Work conducted over the past eight years at the MIT Center for Organizational Learning (now the Society for Organizational Learning), where organizational learning and change are the focus of research, has shed new light on these questions. Beginning in 1991,¹⁶ projects have been launched to understand the impact of organizational learn-

ing concepts, methods, and tools on change initiatives in business settings. Most have resulted in significant – and in some instances, fundamental – change. They have proved that change is indeed possible! However, it has been the work on the redesign and eventual reinvention of the Center itself that provided for me both the inherent challenges and an experiential understanding of a process that produced transformative results.

What follows is the story of the change process at the MIT Center for Organizational Learning, including the context for the process, why it was undertaken, the key conceptual models that guided it, the results, the lessons learned, and the implications for achieving fundamental change in other organizations.² I focus on this particular example in the hope that it will serve to illuminate some of the key issues that must be addressed and capabilities we will need to develop if we are to succeed in building organizations that are truly worthy of our commitment.

The Context for the Process

In 1991, the Center for Organizational Learning was founded as a sponsored research center at the MIT Sloan School of Management by a group of colleagues including Peter Senge, Daniel Kim, Janet Gould, and Bill Isaacs. The Center was organized as a collaboration of corporations,

working in partnership with MIT researchers, to undertake serious experiments in the area of organizational learning and to advance the state of the art of building learning organizations. The initial focus was on developing new learning capabilities in the areas of systems thinking, collaborative inquiry into tacit mental models, and nurturing personal and shared vision, and applying these skills in practical business settings.

With the publication of Peter Senge's book *The Fifth Discipline* in 1990 and the increasing interest in organizational learning, the Center's consortium grew rapidly. By 1995, it included 19 corporate partners.³ These companies undertook a variety of significant organizational experiments, including: building learning capabilities in intact teams, developing new organizational learning infrastructures, transforming the assumptions and practice of executive leadership, and developing internal learning communities. For example, in 1992, Ford's Electrical and Fuel Handling Division (EFHD), a 7,000-person profit center, was losing money and was in danger of being sold off. By 1996, it had more than doubled its revenue and was meeting its profit objectives. According to vice president Bob Womac, "we found that taking dialogue, systems thinking and personal vision from the management team to the front line workers

transformed the way the organization worked" (Senge, 1997, p. 3).

Similarly, at Harley Davidson, a group focused on transforming their new product development process had significant impact. According to Rich Teerlink, who was CEO at the time, "the company was saved from the brink of bankruptcy in the mid-1980s by the heroic effort of more than two thousand people, but it also created a legacy of reactive crisis management that threatened the future. Our organizational learning work has established a new language of basic concepts and is gradually building a base of new skills leading to a second 'turn around' – from crisis managers to continual learners" (Senge, 1997, p. 3).

By the mid-1990s, companies such as Ford and Harley had been involved in learning initiatives long enough to assess the business results and document longer-term effects. Articles were being published about the work of the Center, with the result that the Center was gaining increasing attention. *The Fifth Discipline* was still selling over 100,000 copies a year, and it, along with *The Fifth Discipline Fieldbook*, published in 1994, was generating and renewing interest in the field all over the world.



Not unlike many other organizations, the MIT Center for Organizational Learning was ill prepared for its success. We were under increasing pressure to respond to demands from sponsor companies as well as individuals around the world who were interested in becoming involved in the work.

At the same time, there was, in effect, a hiring freeze at MIT that constrained our capacity. The stage was set for what we were to describe later as simply “the mess.”

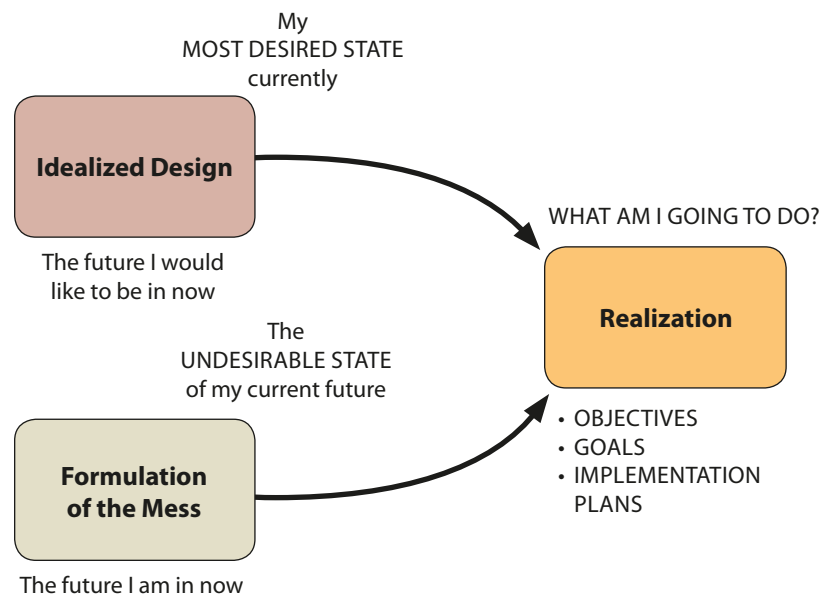
Why the Redesign Was Undertaken

By early 1995, having experimented unsuccessfully with several different leadership structures and low-impact attempts to reorganize the administrative configuration of the Center, it seemed clear that the organizational structure was both inadequate and ill suited to supporting the theories and methods it was espousing.

In addition, the goals and activities of what was becoming an ever expanding, diverse learning community no longer seemed to fit neatly within the expectations and constraints of an MIT-sponsored research center. Although the “official” structure of the Learning Center was essentially the same as other sponsored research centers at MIT, the Learning Center had, in operation, become a network of individuals: representatives from 19 companies, research and administrative staff, several MIT faculty, a few doctoral students, and a handful of independent consultants involved in research projects and educational offerings. We had, in fact, outgrown the bounds of a traditional MIT research center.

There was also a sense that the gap between what we were espousing at the Center and what we were actually practicing was widening. Morale was on a downward spiral. This complex set of circumstances led us to the conclusion that the Center was not sustainable, at least in its current organizational form, and that if we didn’t make some fundamental changes it would probably cease to exist.

FIGURE 1 **Idealized Design Process**



As a result, the major stakeholders of the Center, including representatives from the research and administrative staff, several faculty from MIT, senior managers from companies that had been central to the Center’s development, and several consultants who had been involved in project initiatives, decided to embark on an extended process of reflection and inquiry into the Center’s purpose, design, structure, and operation.

The Process: Guiding Conceptual Models

Idealized Design

At our first two-day redesign meeting, held in June of 1995, we gathered together representatives from all of the major stakeholders of the Learning Center – a significant accomplishment in itself – and gained a commitment to move forward. We also agreed that it would be helpful to have a conceptual model that would help focus, clarify, and guide our efforts.

The first phase of our redesign was influenced by the work of Russell Ackoff, a noted researcher and consultant in the area of systems theory and application. Vic Leo, a long-time Center representative from Ford’s Executive Development Center, suggested we use Ackoff’s Idealized Design Process as a way to frame our thinking and focus our efforts.



Even as we were teaching learning disciplines that inherently involve distributing power among participants in organizations, we were part of a very stratified organizational culture that rewarded individual achievement.

Ackoff's model involves creating an "idealized design" concurrently with a formulation of the "mess," or current situation (Figure 1). This was consistent with the Learning Center's work in the area of shared vision and the principle of creative tension, which involves determining what you care most deeply about creating and at the same time looking truthfully at the reality of where you currently are. The gap between the two generates tension and the energy for moving toward the new reality.

One of the decisions made at the end of the first redesign meeting was to have a small group of volunteers begin to synthesize and summarize the thinking regarding the Center's current reality. Based on Ackoff's terminology, a "mess" team was mobilized, consisting of both research and administrative staff, a former company CEO, and two

company representatives. They focused their work on four basic questions:

1. What exactly was the mess?
2. How did it develop?
3. What were the underlying causes and how were they interrelated?
4. What would happen if no significant changes were made to the system?

In September, the mess team reported back to the larger design team on their progress. They had grouped the current problems at the Center into 13 areas, containing both quantitative and qualitative aspects. These included issues of unmet demands, bureaucratic constraints, unclear boundaries, operational and financial concerns, a confused sense of identity, no widely held shared sense of purpose, and a lack of alignment around the values held at the Center. One aspect of the discrepancy between the espoused and practiced values at the Center was reflected in how the Center operated and the centralization of power and decision making. Even as we were teaching learning disciplines that inherently involve distributing power among participants in organizations, we were part of a very stratified organizational culture that rewarded individual achievement.

In addition, the director of the organization was not only its hierarchical head, but also the person who literally wrote the book on the subject matter. Because of his central role in both the theoretical underpinnings of the field and operational aspects of the Center, he was the only person who had direct interface with all the constituency groups and was involved in all major decisions. This situation was dysfunctional for him as well as the Center.

Based on a systems analysis of the situation, the team developed three recommendations for dealing with the “mess” at the Center:

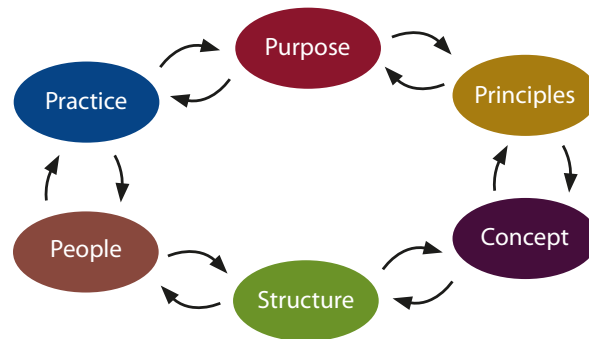
1. Develop a clear, consistent, common sense of purpose and identity to guide us.
2. Align our espoused and practiced values.
3. Create infrastructures that support and reflect our operating principles.

A number of us had a sense that in order to address these issues, and create a Center that would actually facilitate learning (rather than control), we needed a new way of organizing, some new form or model. Yet we were aware of few options, and most of us had no experience working in anything other than traditional, hierarchical organizations. To help in this process, we were privileged to have as our guide Dee Hock, founder and CEO Emeritus of VISA International.

Chaordic Design

In retrospect, it isn't surprising that Dee has had such a profound effect on our thinking and process at the Learning Center. At the time, however, it seemed more like a lucky accident. Peter Senge had recently met Dee at a leadership conference and was intrigued by his thinking on new ways of organizing, based on chaordic principles.⁴ Dee brought to the design process his experience as co-creator and CEO Emeritus of VISA International. VISA is a highly decentralized, collaborative organization that was developed through the same consensus-building process he was suggesting for us. Over the span of two decades, VISA grew from a few hundred members to the largest enterprise in the world in terms of market capitalization. It is

FIGURE 2 **Cycles of the Chaordic Design Process**



a structured blend of competition and cooperation, linking together 20,000 financial institutions, 14 million merchants, and 600 million consumers in 220 countries and territories producing \$1.25 trillion in volume annually.

Given our struggle with how to clarify the Center's identity, align our values and practices, and structure our organization in a way that could promote the globalization of the community, Dee's focus and process seemed intuitively to fit. Also, Dee's ideas for implementing and disseminating new concepts of organization that more equitably distribute power and wealth, release human ingenuity, and are more compatible with the biosphere were in themselves very compelling. After a small subset of the design team met with Dee to discuss his ideas, the design team asked him to join us at the next redesign meeting.⁵

At that meeting, Dee shared with us what he called the cycles of a Chaordic Design Process (Figure 2). He described the six stages as follows:

1. Define with absolute clarity, common understanding, and deep conviction the purpose of the community.
2. Define, with the same clarity, a body of principles against which all structure, decisions, and conduct will be judged; the fundamental constraints that will guide people in their pursuit of purpose.
3. Create a concept of organization that is in accordance with the principles, and is just, equitable, and effective with respect to all discussion, decisions, and acts in pursuit of the community's purpose.

4. Operationalize the purpose, principles, and concept of organization (steps 1 to 3) by developing a new charter, constitution, or bylaws in which all three aspects are embedded as a fundamental obligation of governance.
5. Identify and draw together the people and institutions necessary to achieve the community's purpose in accordance with its principle. (This was subsequently moved to step three in the process.)
6. Identify and engage in the initial practices required to realize the purpose.

Coming to consensus around the most fundamental issues of purpose (why the Center exists) and principles (how we intended to work together to accomplish our purpose) required long hours of deeply reflective conversation.

Beginning in September of 1995, we began the formal redesign of the Learning Center, following Dee's six-step process as described above. At the outset, Dee made two predictions. The first was that it would take us between one and two years to complete the process. The second was that it would entail some of the most difficult and yet gratifying work we would ever undertake.

True to his prediction, one year and ten months later we completed the redesign and formally established the Society for Organizational Learning (SoL), a non-profit, self-governing membership organization. Part of the reason it took that amount of time was the fact that members of the design team were from all over the country and it was impossible to convene for face-to-face meetings more than every three or four months. In addition, much of the work and conversation that began in the design team meetings extended beyond the meetings to the larger community and circled back to the design team. The process functioned

via concentric circles with the design team at the core, having the responsibility for making decisions and articulating the results of the meetings, as well as getting feedback and input from each of the constituency groups. All of what was going on was communicated and made available to the larger community, both in writing and electronically. This aspect of the process was in itself formidable but essential in making sure the redesign work was informed by the perspectives of as many stakeholders as possible.

However, another reason it took so long was that, as Dee had forewarned, it was simply very hard work. His process forced us to focus on fundamental questions of purpose and values, challenging us to go beyond our current thinking and reconceive the very notion of organization. Coming to consensus around the most fundamental issues of purpose (why the Center exists) and principles (how we intended to work together to accomplish our purpose) required long hours of deeply reflective conversation. It was very much an emergent process, one in which we shared our deepest hopes and assumptions as well as our most troubling doubts and concerns.

We also wrestled with some very difficult, and at times personal, dilemmas. For example, when it became clear that what we were attempting to establish involved integrating the work of three communities – research, consultant, and corporate – it also became apparent that the organization itself then did not fit into any one of them. The implication was that the new organization should not be an administrative part of MIT and those of us who were MIT employees would need to leave MIT if we wanted to be a part of the new organization. For a number of us, these were difficult and emotional decisions.

At the same time, due to the generative nature of the process, there was already a belief in the purpose and the integrity of what was emerging even before SoL was officially launched. Dee was absolutely right – it was at once very difficult and at the same time exciting and gratifying.

Results

The results from the nearly two-year process included a clearly articulated purpose, a set of beliefs and principles to guide our work, and structural changes as SoL was established as a new organizational entity in a new location (see Figure 3). In addition to the structural changes brought about by the creation of SoL, the redesign process also resulted in a number of less tangible – but no less important – changes. There was a new sense of excitement and energy as a result of not only an organizational renewal but a kind of organizational rebirth. There was also a sense of accomplishment in having emerged with a broader, deeper, more inclusive mission and clarity about our fundamental purpose.

There was also a heightened sense of responsibility. This was *our* organization, there was no longer “anyone behind the curtain.” On a pragmatic level we could and did accomplish things more quickly – developing a communication strategy, gaining new members, and starting new projects. There is now a perception among staff and members that there is a clearer alignment between our values and our actions. Not only are we espousing learning and change, but we are also practicing it ourselves.

We also succeeded in preserving some core elements of the Learning Center that we felt were important and needed to continue, including: our fundamental beliefs regarding the primacy of learning, our focus on research and knowledge generation, the effort to develop new learning capacities, and the relationship with MIT (MIT is an Institutional Research Member of SoL).

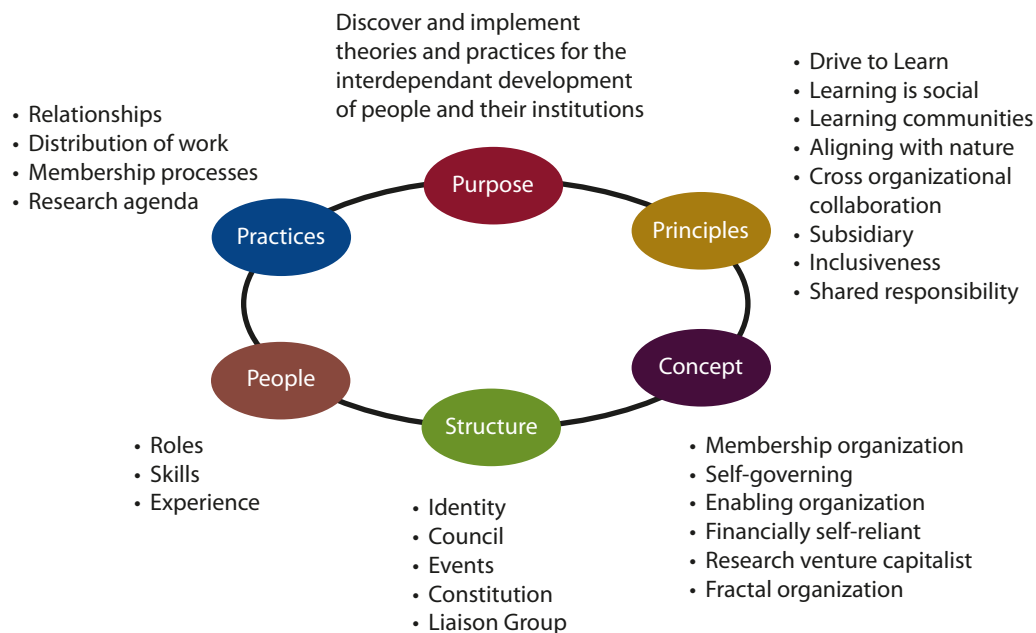
Purpose and Principles

The purpose of the Society for Organizational Learning (SoL) is “to discover, integrate and implement theories and practices for the interdependent development of people and their institutions.” It is a global learning community dedicated to building knowledge about fundamental change by integrating:

- Research (disciplined pursuit of discovery and understanding),
- Capacity building (developing new individual and collective capabilities), and
- Practice (the application of concepts and tools in pursuit of specific ends).

It is designed around a core set of beliefs and principles that organize and guide our work (see box, page 22).

FIGURE 3 **Results: Society for Organizational Learning (SoL)**



Following the inception of SoL in April 1997 as an new organizational entity, we proceeded to transition from an MIT-sponsored research center to an independent, non-profit, membership organization. This included securing formal recognition as a non-profit organization, getting 501(C)3 tax status, securing new office space, and moving the base of operations from MIT to a new location just north of the MIT campus.

The SoL Structure

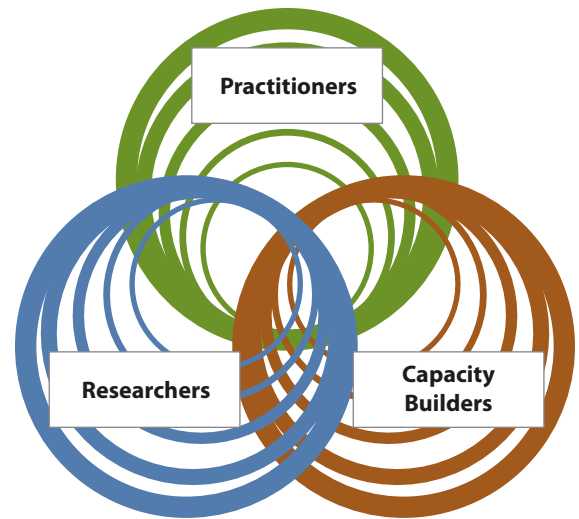
SoL is designed as a membership organization that includes corporate members, research members, and consultant members all linked together as a network of colleagues. The intent is to bring these three communities together in an effort to invigorate and integrate the knowledge-creating process in the area of fundamental institutional change (Figure 4). A constitution and set of bylaws articulates SoL's purpose, principles, and how it operates. It defines the membership categories, governing bodies, responsibilities of the governing council, responsibilities of membership, and the process by which council members are elected.

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The SoL governing council is elected by all of the members, with balanced representation from all three membership groups. There is also a managing director, who is a member of, and accountable to, the council. In addition to the council, there is also a group of liaison officers who include two or three designates from each corporate member. They meet quarterly to ensure alignment between the companies' needs and the overall direction and activities of the SoL community.

The annual meeting is the primary event for conducting the business of the SoL community and

FIGURE 4 **Society for Organizational Learning (SoL)**



electing council members. However, both large and small events are also held to enable members to share research and project work, and to network as a community. Members of the SoL community have the opportunity to participate in community-building activities which are aimed primarily at developing and integrating the three membership groups and facilitating cross-community learning. Members also have the opportunity to participate in an expanding array of capacity-building activities aimed at developing new individual and collective skills. They also participate in learning initiatives designed to generate new knowledge in the area of fundamental organizational change.

SoL is designed to be financially self-reliant, taking in funds through membership fees, meetings, educational offerings, services, products, and research contributions. It also allocates funds for the development of innovative research ideas in line with the overall research agenda of the SoL community. The operational staff of SoL provides a range of community-building, capacity-building, communication, and coordination services aimed at integrating the diverse members of the community.

Finally, SoL is designed as a "fractal organization" – a network of independent chapters, operating

in various locations, that are committed to SoL's purpose and principles. The intent is to develop a global network of SoL chapters at the local, national, and international level, all connected through a global infrastructure.

Lessons Learned

New Ways of Conceiving Organization

It is ironic that in this age of ever-accelerating technological innovation and continuing economic globalization, we still operate our organizations using 400-year-old, Newtonian-based models. This machine metaphor not only dominates how we think about organizations, but it also limits how we think about changing them. We need look no further than our corporate language for evidence: we "reengineer," "drive," "re-tool," "roll out," and "restructure" in order to change. We accept it as a given that our organizations are designed and structured for control rather than for learning, even though we may intuitively sense that learning is essential for organizational success, perhaps even survival. It should not be surprising that applying 17th-century thinking to our 20th-century reality does not get us where we want to be.

We are desperate for new metaphors, models, and ways of conceptualizing organizations, yet very few exist. At SoL, we found that a key to our success in generating transformational results was that the chaordic design process forced us to examine our most fundamental assumptions and beliefs about organizations. We learned that changing organizations in fundamental ways first requires changing how we think about them.

However, this new approach was not easy to embrace or to implement. Dee Hock's concept of chaordic organizations was a conceptual leap for most of us involved in the design process. I still remember how my head ached when I first saw Dee's chaordic organizational diagrams – they looked like pictures of atoms from some physics textbook. Even after two years, we are still eliminating or reinventing structures that act to centralize power and activities at SoL. Hierarchies are the water we swim in, and it takes time to become

aware of, let alone let go of, our deeply ingrained patterns of thinking.

What differentiated Dee's process from others I had experienced was that it started with reflection and conversation focused on our deepest aspirations. The simple and yet profound elegance of this approach was that it rested full responsibility from the outset right where it belonged – on us as individuals and as a group – for creating what we wanted. We collectively considered what we care most about creating, and how we wanted to work together to accomplish it. Then we discussed what kind of design and structure would most help us realize our aspirations.

We collectively considered what we care most about creating, and how we wanted to work together to accomplish it.

It took about six months, perhaps seven or eight days of face-to-face conversation, to get to the point where we felt that our purpose and operating principles were clear and meaningful. We refined these further as we progressed through the remaining cycles of the process. It was very different from what seems the norm in companies today, where senior managers develop a mission statement and then "roll it out" to the rest of the organization. Rather than a task to be accomplished or a mandate handed down from above, this was a process of discovering and generating a new organizational reality from within ourselves.

Required Capabilities

On reflection, several key skills and capabilities were, I believe, a prerequisite for the success of the process. The first was that the group was relatively mature and had a capacity for both personal and shared reflection. There was a willingness on the part of each participant to reflect on and share his or her perspectives, thoughts, and feelings. People were genuine and listened to one another.

Another key factor was a tolerance for ambiguity on the part of the group. We did not know what the outcome of the process was going to be, or if there was even going to be a workable outcome. Even a year into the process, a number of us were unsure if we would still have jobs or, if so, where they would be. This was emotionally difficult, but it did increase our capacity for patience. We discovered that ambiguous – even messy – situations are not necessarily bad.

However, virtually everyone on the design team “hit the wall” at one time or another. Dee himself threatened to throw in the towel on several occasions. We all needed support at times. Coaching – the capacity to give and receive support – was essential to the success of the process. Numerous conversations took place both during and outside the meetings that helped each of us deal with whatever was causing our frustration and discouragement.

From the Society for Organizational Learning's Consitution, 1997

The Members of SoL believe that:

- **Drive to learn** – all human beings are born with innate, lifelong desire and ability to learn, which should be enhanced by all organizations.
- **Learning is social** – people learn best from and with one another, and participation in learning communities is vital to their effectiveness, well being and happiness.
- **Learning communities** – the capacity and accomplishment of organizations are inseparable from and dependent on the capacities of the learning community that they foster.
- **Aligning with nature** – it is essential that organizations evolve to be in greater harmony with human nature and with the natural world.
- **Core learning capabilities** – organizations must develop individual and collective capabilities to understand complex, interdependent issues.
- **Cross-organizational collaboration** – learning communities that connect multiple organizations can significantly enhance the capacity for profound individual and organizational change.
- **Inclusiveness** – conduct all deliberations and make all decisions by bodies and methods that reasonably represent all relevant and affected parties.
- **Shared responsibility** – advance the purpose in accordance with these principles in ways that enhance the capacity of the community as a whole, as well as that of each member.
- **Openness** – transcend institutional and intellectual boundaries and roles that limit or diminish learning.
- **Adaptive governance** – continually conceive, implement and practice governance concepts and processes which encourage adaptability, diversity, flexibility and innovation.
- **Intellectual output** – use research generated by the community in ways that most benefit society.
- **Acknowledgement** – open and fairly acknowledge intellectual contribution to concepts, theories and practices, both from within and from outside the community.
- **Participation and quality** – contribute to and/or participate in research, capacity building and practice, striving for the highest standards of quality.

Therefore, SoL and its members intend and will use their best effort to practice:

- **Subsidiarity** – make no decision and perform no function at a higher level than can be accomplished at a more local level.

The design team's familiarity with the basic concepts of shared vision and systems thinking was also very helpful. The use of systems diagrams by the mess team, for example, helped identify and clarify why we were experiencing certain problems, and how they were interrelated. Plus, the ability to view the process holistically enabled us to think broadly and imaginatively about what we wanted to create.

Key Elements of the Design Process

In addition to the capabilities mentioned above, there were also a number of characteristics of the process itself that enabled it to succeed. First, the decision to involve representatives from all the primary constituency groups on the design team was critical, both for attaining a desired outcome and for ensuring the integrity of the process. In order for the group to have clear decision-making authority for changing the organization, it needed to reflect the diversity of the community it was representing.

Another essential characteristic of the process was that it was grounded in the pragmatic business realities of the organization. We were all fundamentally committed to creating an organization that worked well and could succeed financially. Although there was some resistance when we got into the complexities of crafting a constitution with specific bylaws, articulating how the organization works with precision and thoroughness has, in retrospect, served us well.

Finally, there was a commitment to retaining elements of the organization that were most valued. Perhaps an often-overlooked function of a transformational process is that it provides an opportunity to consider what aspects of the organization are important, and how to ensure that they will endure.

What was not readily apparent to many of us at the onset of the design process was the generic nature of the issues that we faced as an organization. The fundamental concerns that the mess team surfaced – such as the lack of a clear,



consistent shared vision, and the disconnection between our espoused versus practiced values – were all problems we hear over and over from member companies. We discovered that many issues that appear unique to a particular organizational context are, at a fundamental level, remarkably similar.

Future Challenges to SoL

It is still early to speculate on the long-term sustainability of SoL, since the organization is just two years old as I write this. However, we are far enough along to begin to understand some of the challenges we face as a community.

There are now a number of SoL fractals (chapters) that have been, or are about to be, established in Europe, South America, and Asia. In the USA, a Midwest SoL has been established, with others soon to follow in Texas and Georgia. A new SoL International infrastructure is about to be incorporated.

With this expansion comes the obvious need to extend our infrastructure and processes for sharing what we are learning and for developing learning capabilities among our worldwide members.

Perhaps the greatest challenge for the SoL community is not to lose sight of the fundamental questions we started with: how do we as a community realize our deepest aspirations for change? How can we continually adapt SoL as an organization so it serves us rather than the other way around? Reinventing from the inside out is truly an ongoing and worthy challenge.

Dee Hock eloquently sums up the struggle, and opportunity, that we face:

We are at that very point in time when a 400-year-old age is dying and another is struggling to be born – a shifting of culture, science, society, and institutions enormously greater than the world has ever experienced. Ahead [lies] the possibility of the regeneration of individuality, liberty, community, and ethics such as the world has never known, and a harmony with nature, with one another, and with divine intelligence such as the world has never dreamed. ■

ENDNOTES

- 1 Dee Hock's ideas on new ways of organizing proved central to our work reinventing the MIT Center for Organizational Learning, as shown in this article.
- 2 It is important to acknowledge that this is a story told largely from the perspective of someone inside the organization, with all of its inherent biases. However, mine is not the only perspective reflected here. I am particularly grateful for the contributions of Linda Pierce and Tom Ryan from the Shell Oil Company, who participated in Shell's transformational process as well as MIT's. Also to B.C. Huselton and Vicki Tweiten who served on the "mess team" with me as a part of the process, and to Steve Buckley and Jane Punchard, both members of the SoL management team, who generously shared their "before" and "after" perspectives.
- 3 The 19 corporate partners included: Amoco, AT&T, Chrysler, EDS, Federal Express, Ford, Harley Davidson, Hewlett-Packard, IBM, Intel, Lucent Technologies, Merck & Company, National Semiconductor, Pacific Bell, Philips Display, the Quality Management Network (a consortium of healthcare organizations), Shell Oil Company, Texas Instruments, and US West.
- 4 Chaordic [kay'ordic] (1) anything simultaneously chaotic and orderly, (2) patterned in a way dominated neither by chaos nor order, (3) existing in the phase between chaos and order (Half Moon Bay, CA: Chaordic Center Alliance, 1998).
- 5 Dee and the design group also had excellent help from Prof. Larry Yee of the University of California San Diego, who was on sabbatical and was working with Dee on several projects, including ours.

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FEATURE 12.4

Scenarios 2000:

Four Futures for Organizing and Leading in the New Economy

ART KLEINER*

In 2000, a group of 20 individuals – members of SoL as well as non-members including religious leaders, Fortune 500 executives, academics, environmentalists, community activists, and others – convened for the purpose of bringing to SoL members new perspectives that could lead to “unexpected insights” which in turn could influence both individual and collective thinking and ultimately the future of SoL’s work around the globe. The resulting scenarios describe four distinct future worlds in which technology, corporations, multi-cultural reformation, and world decay prevail. We have included a condensed version of the original scenarios. Although some of the projections haven’t come to pass, when reflected upon collectively, these scenarios raise fundamental issues about human identity and the role of community in our collective future. We have also included a retrospective Commentary by Adam Kahane, who helped to facilitate the original process.

The four stories you are about to read should only be seen as starting points – an opening from which to think carefully about our common future.

Given this complexity, how can we better know the potential impact of our decisions? How can we choose whether to keep or change jobs, whether to give our time to one endeavor or another, whether to settle in one place or another, what kinds of long-term organizational decisions to make, and what sort of life to try to create for ourselves and our families?

The people who developed these four scenarios included consultants to internet startups, religious leaders, business school academics, writers and artists, community activists, Fortune 500 executives, venture capitalists, environmentalists, healthcare entrepreneurs, and so on. The organizers were looking for people who might bring perspectives to the attention of SoL members that could lead to surprises and unexpected insights. That presence of outsiders makes it easier to see the color of the water of the aquarium we swim within.

These four futures probably won’t come true in themselves, but they represent flavors of events and trends that will almost certainly influence the future of SoL members. By giving names to these flavors,

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Four Scenarios

Techno-Gods	The inexorable march of machine (and bio-machine) progress takes humanity across yet another technological threshold into a significantly accelerated post-industrial environment.
Corporate Gatekeepers	Spurred by globalizing, merging corporations and increasingly uncertain governments, the world crosses a threshold of political organization, dominated by a few large corporate-governmental entities that seek control over uncertainties.
New Renaissance	Western and Eastern societies cross a threshold of values awareness, leading to a “new renaissance” that includes new institutional practices and a reformation in ways of living.
Virus World	The industrialized and developing worlds both cross a kind of “boiled frog” threshold of decline, in which every debilitating factor acts with the seeping decay of viral infection.

we pick up a handle with which to talk about our future. Yet these are not just extrapolations of current trends. Each describes a kind of threshold that the world must cross, a boundary to a different way of life.

Scenario 1: Techno-Gods

“We are as Gods,” wrote Stewart Brand when he created the *Whole Earth Catalog*, “and we might as well get good at it.” In this scenario, humanity takes this statement literally – but doesn’t necessarily get good at it. Technological advance continues at its most accelerated plausible speed, but human values and governance structures muddle along trying to catch up. The threshold that gets crossed is partly technological and partly spiritual. But it is a threshold of power. The awareness that we can be as Gods changes the human spirit in a tangible, qualitative (and not necessarily benign) way.

It is 2010, and people are plugged in as never before. Culture is global; indigenous people in, say, remote parts of the Amazon are as plugged in as anyone else in the world. This means that opportunity and economic growth are rampant throughout the formerly “developing” world – with a resulting increase in anxiety among the former industrialized nations. People are glutted with information and advertising, targeted at them, appearing everywhere from the street signs by their homes (“Good morning, Betsy. The grocer down the street has a special on the kind of cereal you like”), to the inside rim of their eyeglasses. This is a high-touch future as well, at least for the affluent, with a fast-moving, fun-filled economy (but

lots of nervous breakdowns and invisible, hidden burnout cases). Companies devolve and re-form continually; people “own” their jobs, a state that often resembles indentured servitude.

In short, this is a future of winners and losers, fueled with such manic, fast-paced change that the losers continually get another chance . . . and another . . . without much thought for consequences. Few people question the values of this world, or the places it is going, in any meaningful way, because there is simply no time to reflect and take stock.

How we got to Techno-Gods

In the early years of the 20th century, the enormous wealth created by the “Internet surge” propelled a second technological boom. The speed, reach, and low cost of the global electronic network accelerated until it engulfed all human activity. The speed of innovative cycles was so fast that in many fields, it was impossible to govern (or even be aware of) the impacts of new machines. The net, in effect, became not just an index to all human life, but a medium through which businesses and individuals redefined themselves.

Even by 2000, it was clear that the Internet bubble would burst, but the inevitable consolidation did not mean a slowdown in technology. Instead, the “dot-com shakeout” of 2003 reframed the corporate environment, eliminating many old dinosaurs and replacing them with new, more resilient corporate mammals. Surplus investment capital, the influence of the new techno-billionaires, and seemingly infinite varieties of new technology

continually spurred each other to new levels. This occurred at the same time as an increasing individual search for release from boredom and for spiritual meaning – in the workplace or elsewhere. By the standards of the 1990s, spirituality seemed oddly detached from old concepts like “family” and “community,” but all the more compelling in that vacuum. The “winner-takes-all” economy was flush enough that even the “losers” were included.

By 2009, the advance of technology had led to high levels of artificial intelligence embedded in an increasingly electronic urban environment. People were connected, through body implants and day-to-day performance, in ways that even the artists of the 1990s had not quite imagined.

What happens to us in Techno-Gods

- Urbanization increases.
- Everything, including human dignity, can be reframed as a transaction.
- Artificial intelligence is unleashed, and many objects come alive.
- Privacy is gone. “Everything you do is known, but no one judges you. They only cash in.”
- Wearable technology has moved almost to the point of implants.
- Attention deficit disorder is a cultural overlay.

This is a world of emotional and spiritual vulnerability, precisely because human capabilities for community are less exercised.

- More people live in social isolation, never leaving their homes, but connected to the world.
- Wealth is the ocean, with islands of poverty, even in the developing world.
- An unprecedented glut of organizations operate in a continually shifting web of alliances, with new ones springing up whenever anybody needs to start one.
- People essentially go through their careers building on the human relationships that they have with each other. They stay in a team, even though that team may move from Ford to Coca-Cola to some other place during the course of a lifetime.
- The net knows where you are. Wealthy people occasionally pay for “privacy spas” where no one can get to them.
- Nanotechnological sensors have developed instant monitoring of (for example) stress levels, so human health has reached an unprecedented peak.



- Materials and food technologies have also expanded and increased. Energy efficiency is dramatically improved.

Some notable implications of Techno-Gods

The most interesting, perhaps, is the interrelationship between technological growth and spiritual need. We are as Gods, and we need God more than ever. This is a world of emotional and spiritual vulnerability, precisely because human capabilities for community are less exercised.

This is also the future of greatest economic boom. Omnipotence, as one participant noted, starts with wealth.

There was almost no government mentioned in this scenario. Presumably big governments still exist, but they have devolved largely to the status of entertainment, perhaps with electronic voting beginning to replace many of the legislative functions.

The notion of indentured service emerged in this future. People indenture themselves to enter the plugged-in world. Because machines act as a force for decentralization, this future belongs to the customers and employees, not to the bosses.

Finally, this future is (on some level) predetermined. It will happen, in some form, unless something specific is done to block or deflect it.

Scenario 2: Corporate Gatekeepers

This scenario depicts a world in which corporations seek control not just over their private goals but over the public sphere as well, becoming in effect the “gatekeepers” of civic life. In this future, corporations override local tariffs and regulations. Investment capital and corporate activity move freely across national borders. A global representative government has in effect replaced the UN. It is elected by boards of corporations, who in turn represent shareholders.

Only a dozen or so major companies divide the world among themselves. Many regions or nation-

alities have reconstituted themselves as “gated nations,” in which a few companies dominate employment and trade. These companies have more power than countries. The barrier to entry for new organizations is high.

Social stratification is high. People love the lack of stress and the comfortable way that decisions are made for them once they join a corporate lifestyle. The world is a meritocracy. Institutionalized education is seen as the path to a controlled career. The market is unfettered, but paradoxically the amount of control needed to survive and thrive is perceived as greater than it has ever been. Eccentrics and indigents retreat to enclaves outside the mainstream.

How we got to Corporate Gatekeepers

In 2001, after Microsoft finally defeated the Department of Justice judgment and prevented the breakup of the company, after cyberterrorism scares became commonplace, and after the Internet bubble threatened to burst, groups of global business and government leaders began to meet, focused on the subject of organizational security. Since these meetings rarely took place in the U.S. or included more than one American competitor, anti-trust was no longer an issue. The meetings represented a prelude for a new kind of merger mania: strategic mergers, focused not just on maintaining shareholder value but on wresting back control over the unruly market, in a way that democracy could not.

At the same time, in the aftermath of the 2000 Presidential election, people grew fully disenchanted with national leadership. “They’re just pre-bought corporate lackeys,” was the view of the person in the street. By 2004, the U.S. Secretary of Commerce was officially appointed by the Business Roundtable.

Business leaders no longer pitted themselves against government. Government existed to create wealth and thus to develop a better standard of living for people. Departments of Commerce were soon run by pro-business appointees;



industries like banking, that once had been closely regulated, now became unregulated.

In 2004, atmospheric scientists confirmed that increased presence of carbon in the atmosphere had indeed led to more turbulent weather. In 2008, several earthquakes took place on the San Andreas Fault in California, and California became an island. Similar natural disasters were occurring throughout the rest of the world.

Humanity looked for safety where it could find it – in the largest corporations. There were now “company regions,” where everyone involved either worked for the same global enterprise, for one of its suppliers, or for a business that catered to its employees. Microsoft administered the regional government of Seattle-Vancouver, beginning in 2010.

Some local communities seceded from the global net, building their own identities based on alternative products, local “sweat equity” currency, and cooperative investment. Some are led by survivalists who opt out of the corporate economy. Others

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represent a subculture of makers who cluster around artist colonies. Using the Internet, they make “what the customer wants” when the customer wants it. As a consumer, you can get to know the person who’s making it for you.

What happens to us in Corporate Gatekeepers

- No company is merely “national.” No job is local. But localities are corporate. Every company has its own “value spots” around the world.
- Big companies are taken over by bigger companies. National governments are eroded, acquired, or irrelevant.



- The number of world-class currencies has decreased to the dollar, yen, and Euro.
- A small circle of CEOs and presidents control capital. We either fit in or we are indigent. We accept this because we have become so anxious about our own individual survival.
- This is a good future in which to have an MBA.
- There is a commodified infrastructure for reflection: coaches and mentors help corporate leaders communicate and develop wisdom. (Coincidentally, it probably leads to a lucrative role for SoL.)

Some notable implications of Corporate Gatekeepers

“Corporate Gatekeepers” will probably be most plausible to you if you believe that human beings will always run in packs and look for the dominance of “alpha males.” The social responsibility of corporations takes on great significance in this future, because with their new social role comes increased responsibility. Nevertheless, this scenario assumes that greed and self-interest will trump all other emotions. This future evolves from a world in which young managers routinely leave high-

paying positions to take better offers, without any concern for loyalty.

The boundary between “art” and “commercial” is inextricably blurred. Advertising writers are revered as auteurs. In a paradoxical way, again, corporate control allows room for this kind of “un-boxing” to take place.

Despite the Internet, despite the borderless world, geography is still relevant here. People are marked by where they live.

Scenario 3: New Renaissance

Here is a scenario of a plausible awakening of conscience and consciousness, both global and local. It takes place in a way that leads to a fundamental realignment of corporate and civic structures, in the service of a sustainable future. The idea that technology is a panacea loses currency (perhaps because of a visible technological calamity). It becomes accepted that human beings are more than analytical creatures; we are whole beings. Boundaries are blurred between business, government, and civil organizations, but not in the service of

control. Instead, people accept a life of less control because they realize how illusory their efforts at control were all along.

In this future, people believe that the body is an integrated part of the whole person and that medical care is an aspect of personal growth and transformation. Philanthropy becomes a part of the well-lived life. Instead of working through large foundations, people give money in ways that allow for a sustainable relationship with the project that is funded. There is generally a reconnection with spirituality, a stress on quality instead of quantity, and more efficiency and creativity in the use of natural resources.

How we got to New Renaissance

Already, the signs were evident in 1999 or 2000, but few people were paying attention because so much of the activity was local. It was hard to see the full shift until it happened worldwide.

Material things no longer seemed to matter much. With economic success available to so many people, we were looking for a way to sustain civilization, not just to grow it. Of course, we were also looking for an antidote to our stress-filled, fast-paced lives.

The children made the difference. They started to hold conferences to transform moribund schools. They organized themselves over the Internet on behalf of environmental change. They started pooling money to buy corporate shares to try to influence the companies. They wanted a voice in the world, and they wanted a better world.

Global advocacy groups, including environmentalists and labor groups, found an increasing constituency inside and outside corporate walls. In general, corruption diminished, because in an Internet-driven world, it was harder to make it pay.

Medical breakthroughs recognized the interdependence of mind, body, and spirit. Meditation became common. School curriculums included art, music, and even spirituality.

Around 2003, many healthcare systems collapsed. Only those with an orientation toward preventive care survived, because the rest accomplished little except diverting money from one set of pockets to another.

An emphasis on sustainable transportation and power was bolstered by energy sources like fuel cells and photovoltaics, as well as by a renewed emphasis on energy efficiency.

Ted Turner's gift of \$1 billion to the United Nations set the stage for a series of individuals and philanthropists to reinvent philanthropy based on "emotional intelligence." A group of Silicon Valley executives modeled themselves on the Medicis and asked, "What could we do together to foster another renaissance?"

In this future, there is a reconnection with spirituality, a stress on quality instead of quantity, and more efficiency and creativity in the use of natural resources.





But most of the action did not take place at the global level. Small enterprises funded by micro-credit, particularly those operated by women, reached critical mass throughout the formerly “developing” world. There was a lot of work to do, but also a spirit of optimism and joy.

What happens to us in New Renaissance

- Environmental and labor groups make a case against the runaway form of globalization promoted by advocates of global laissez-faire.
- Education becomes a primary catalyst for change.
- The medical industry is transformed into a system designed to help people thrive instead of simply repairing breakdowns.
- Cheap solar technology emerges. Transportation alternatives include more public transportation, bicycle pathways, and Internet use.
- Investors now routinely look for long-term sustainability.
- With the human lifespan increasing, many people have not just multiple careers but multiple life engagements.
- Technology is increasingly used for human connection and to enhance the quality of life.

Some notable implications of New Renaissance

Nearly everyone who helped describe this future said in effect, “I don’t believe it could really happen,” and yet they not only yearned for it, but were willing to invest in it. The “New Renaissance” scenario would require a “virus of hope” (as corporate manager Johannes Meier put it), enabling new ideas to “infect” the mainstream. It would also require some way of drawing in the people who mistrust the surface but might actually appreciate the depths.

Said someone at the workshop, “The original Renaissance was created by not many more than 100 people. We already have 20 in this room.” Perhaps, people noted, some of the cultural signs of disharmony and fragmentation (such as the greed of the dot-coms) is a flipped version of passion. “They’re not passionate about making money, so much as about creating things.” If that is true, then the scenario of “New Renaissance” has a better chance of existing.

Scenario 4: Virus World

Society becomes a virus incubator in this future. Nothing gets bad enough to trigger a curative

response, but it's as if the world has a perpetual, low-level case of the flu. AIDS is devastating in some regions – but not everywhere, and it drops back before people get outraged enough to invest more in a cure for it. Criminal activity and the Mafia-ridden economy keep growing, but never threaten established governments or companies. Sometimes outlaw investment and drug trafficking wax; sometimes they wane. Natural catastrophes increase in number, and global warming-related crises proliferate, but it never gets bad enough to overwhelm decision-makers' mindsets.

Nationalism and new ideologies continue to emerge. Sea levels rise, genetic accidents occur. Parts of the Philippines are submerged. Iraq black-mails its way onto the UN Security Council. Terrorist attacks proliferate without pattern.

This is a scenario of oscillating destabilization. Things periodically seem to get better, and attention wavers. After all, there is always the crisis of the moment to address, the current "spike" in the equilibrium to deal with. Things never get bad enough to address in any systemic way.

How we got to Virus World

It's 2010. Politically, we have been at peace – or at least at truce – since the Clinton era. But then how did things get in such a mess?

In 2000, there were five high school mass murders – all at affluent, suburban high schools in Silicon Valley. We paid for security systems and metal detectors, but most Silicon Valley teachers and cops quit. Religious cults gained political power, especially after a software glitch took out eleven planes during an eight-hour period in 2005. The Russian crime mafia had pretty much finished off the Italian mafia by 2005. They were suspected of being behind the 2006 hacker attack on AT&T, but that was later proven to be masterminded by a pair of twelve-year-olds in Saigon, who are now suspected to be living in Barcelona.

The crop failure of 2003 took Citicorp with it, and we miss it now, because it wasn't realized

How long would society actually go down this road before there was a concerted effort to turn away from it?

at the time how much that company served as a linchpin for global financiers who moderated economic speed bumps.

Information technology definitely played a role. By facilitating easy mobilization around issues, it drew people into atomized sub-groups, with little contact among them. Environmental crises further destabilized the situation, by occupying so much of the attention of political and community leaders.

Economically, we saw the linking of buyers and sellers directly. Without the brokering institutions, there was a further destabilization effect.

What happens to us in Virus World

- Poverty and illiteracy exist, but they exist with "net connections." Being connected does not mean that you are wealthy.



- There are islands of wealth and happiness amidst oceans of poverty and slow debilitation.
- Despite all the net access, people feel disconnected. They suffer, but they have no way to speak about it, because whatever they say, someone has already said it before them, and no one is interested in listening.

Identity is inextricably linked with community and, at heart, these four scenarios raise the question of communities in the future.

- Inflation is also reappearing.
- Conflict over natural resources grows, especially over water shortages.
- People are very concerned about spiritual stability in the face of continued low-level crisis. There are religious pockets and cults everywhere.

Some noteworthy implications of Virus World

This is the scenario of the “boiled frog” – the pan of water is heating up so slowly that the frog receives no warning to jump out and remains in the pan to be boiled alive. The complexity of whole systems is a driving force. So, clearly, is complacency in the face of complexity. The whole is unable to address the problems of the whole. And anxiety makes things worse. For instance, a global fear of technology leads to laboratory destructions, which lead to world hunger, because the laboratories possess all of the research on the grains, fertilizers, and activities that are supporting the system.

How long would society actually go down this road before there was a concerted effort to turn away from it? And would it be possible, at that late date?

A Final Theme: Issues of Identity

One key theme seemed to emerge again and again in these scenarios. It concerned the unyielding nature of human identity – the ways in which people continue to seek their own control over the way they define themselves and to resist all other efforts to define them. Culture, diversity, ethnic and racial identity, economic identity, corporate affiliation, the choice of where to live and how to live – all of these qualities of an individual may or may not be immutable, but in every one of these futures, people conscientiously and stubbornly hold fast to their right to define themselves, against all other pressures, including the pressure of any “industrial machine.”

The amalgam of habits, predilections, and mental models that we associate with the word “identity” really represent a set of trends in human attitudes about joining, belonging, and standing apart or together. These prevailing attitudes will, in turn, deeply influence the things people expect from corporations, communities, and other groups, and the things we are willing to give to them. Thus, identity is inextricably linked with community and, at heart, these four scenarios raise the question of communities in the future. What kinds of communities are easier to foster in each of them? What kinds of communities are more difficult? What is the difference between organizations and communities, in each of these futures, and what covenants do people naturally enter into as they established shared relationships?

Communities take time to create. The decisions made today will influence the kinds of communities that exist in 2010, no matter what future has come to pass. ■

COMMENTARY 12.4

Commentary

ADAM KAHANE



Adam Kahane

I have a substantive observation and a methodological observation about these scenarios. The substantive observation is that rereading them almost exactly 13 years later, I was surprised and impressed by how much they still illuminate what is going on in the world. The insights are still relevant today and allow me to see things that I wasn't paying attention to.

Often, scenarios become obsolete quickly – they talk about things that are important at the time they are written, but a few years later, they aren't important any more or interesting any more or they may be obvious. In that sense, I think these scenarios have really stood the test of time; you could say all four of them were prescient. I guess that has to do with the fact that the participants in the workshop were seeing then the weak signals of trends that have continued and were pointing out phenomena, challenges, and opportunities that remain with us.

The only major omission that strikes me is that the tone of these scenarios is very economically upbeat. Even the title, "Scenarios for the New Economy," reflected the heady optimism of that period. In that particular sense, they don't reflect the much more pessimistic economic climate that we experience now and the quite different sets of challenges and opportunities that this climate presents.

My methodological comment is that, reading these scenarios, I can see that we were beginning to articulate the distinction between what I have since labeled "adaptive scenario planning" and "transformative scenario planning." It's alluded to in the original introduction I wrote to that text where what I now call "transformative scenario planning" is referred to as "civic scenarios," a term that I and those at SoL, including Katrin Käufer and Bettye Pruitt, were using at the time.

Since then, this distinction has been really crystallized, that is to say, the distinction between using scenarios to observe and adapt to what is happening in the world versus using scenarios to influence or transform what is happening. And when you are conscious of this distinction, the methodology required changes in several very important ways that are not at all reflected in the methodological note in the text. So for example, the whole question of who needs to be involved in the scenario process if we're trying not to just adapt to the future but to transform the whole. The question of convening a team that is interesting and insightful and influential is not mentioned at all. Also not mentioned is the fact that scenarios can generate both adaptive and transformative actions. ■

ABOUT THE AUTHOR

Adam Kahane is a partner in Reos Partners. His most recent book is *Transformative Scenario Planning: Working Together to Change the Future* (Berrett-Koehler, 2012).

FEATURE 12.4

The Marblehead Letter

GLOBAL SoL NETWORK STEWARDS

This letter, written in 2001 by representatives from corporations who sponsored the development of the Global SoL Network, served as an invitation to the SoL community to participate in reflecting on the major issues shaping the strategic context for all companies. By organizing an international conversation, known as the SoL Leadership Dialogues, these stewards of the Global SoL Network provided a kind of holding environment in which leaders from around the world had the rare opportunity to genuinely “think together.” They believed that sustaining the opportunity for reflection in an environment of perpetual doing was essential to developing new capacities for shared understanding and coordinated action in the face of increasingly complex issues that challenged them individually and collectively.



The Marblehead Letter

October 22, 2001

Cambridge, MA

To: Members of the SoL Community

Re: SoL Leadership Dialogues

When the Society for Organizational Learning (SoL) began ten years ago as the Center for Organizational Learning at MIT, leaders from large corporations recognized that the challenges and opportunities of the future would require a new level of collaboration. Each organization made the commitment to undertake change projects in some if not all of its business, to engage in research and building learning capacities in the process, and to share the results of this work with their peers.

In the ensuing years, the pace of change and the complexity of the business environment has done nothing to lessen our convictions about collaboration. Today, we feel it is essential that leaders at many levels in organizations

- engage all their sensing capacity to identify challenges and opportunities,
- reflect on their meaning and implications,
- clarify what results the organization wants to create,
- generate a range of options to consider with appreciation for their unintended consequences,
- adopt an experimental posture to develop new skills and behaviors while testing assumptions about the issues at hand, and
- build relationships within and between organizations that creates a resilient network of resources and support.

Yet, the opportunities for genuine reflection and dialogue among organizational leaders are meager compared to the needs for such dialogue. When we, representatives from companies who have sponsored the development of the SoL global network, met in late June, we decided that we wanted to create a way to address this need. The purpose of this letter is to invite you to participate with us in developing the SoL Leadership Dialogues.

Today, SoL communities are forming in over 30 countries on all six continents. A natural agenda of issues shaping the future of organizations is emerging in this global network. We believe these issues will be especially important for corporations with global scope like ours. These issues include:

1. The social (and economic) divide

The ever-widening gap between those participating in the increasingly interdependent global economy and those not, both between and within different countries. The so-called “digital divide” is one dimension of this. But framing the problem in this manner tends to invoke technological responses, rather than deeper inquiries into the forces behind and consequences of globalization. The anti-globalization movement is growing not because people lack access to the internet but because they feel a profound sense of dislocation and threat. Moreover, the possibilities for collaborative inquiry appear to be diminishing as fear and distrust grows. What are leading corporations doing today to address these issues, and how are they making it part of their business? What are the range of innovations – in market growth, human resources, and ownership and governance – that must be considered for the future?

2. The system seeing itself

The challenges for coordination and coherence in social systems, be they global corporations, industries, or still larger systems. Organizations traditionally oscillate between decentralization when business is good and centralization when it is not. On the one hand, autonomy by itself can produce uncertainty, waste, unnecessary internal conflicts, confusion and frustration for customers, and inability to

work productively for the common good, both the firm’s and society’s. On the other hand, central control is inevitably limited in diverse, geographically distributed enterprises. Are there alternatives to central control in achieving high levels of coordinated action? What sorts of capabilities, technologies, and infrastructures need to be developed to help people better see how local actions impact extended, interdependent systems that are invisible locally, as well as the overall performance of the enterprise? How do we balance autonomy with health of the whole?

3. Redefining growth

Economic growth based on ever increasing material use and discard is inconsistent with a finite world and finite capacity to dissipate waste. Yet, our business and financial models depend on growth: if a company fails to grow in revenues and profits, it is out of the game and others who embrace growth will take its place. This dilemma may require rethinking how growth can be brought into harmony with the natural environment. Is there a way to reconceive “growth” in a different sense? Is it possible to base healthy economies on continuing increase in value created rather than on continuing increase in material throughput? What are the implications of such a shift, for business, financial markets, customers, and investors?

4. Variety and inclusiveness

Developing inclusion as a core competence in increasingly multi-cultural and diverse organizations. Issues of diversity have been mostly seen as problems to be solved rather than strategic opportunities. But those organizations that learn to learn better across cultural, gender, and ethnic boundaries and learn to make differences in how people think and learn an asset rather than a liability will have unique advantages in today’s world. Moreover, if corporations are to be a force for good in the world, they must reflect better the world’s people in their composition. Yet genuinely embracing inclusiveness is challenging. How can we develop the capacity to confront difficult issues that most corporations have not yet been willing to talk about?

5. Attracting talented people and realizing their potential

Developing commitment in a world of “free agents” and “volunteer” talent. Increasingly, talented and educated people have many options in their employment choices. Indeed, the very concept of “employee” may be an Industrial Age notion that is becoming increasingly irrelevant and even counter-productive. Moreover, organizational boundaries have become more ambiguous, as mergers, acquisitions, strategic alliances, and diverse forms of partnership continually reconfigure businesses. This makes people’s organizational affiliations also more ambiguous. Against this backdrop of flux and uncertainty rest unchanging personal desires for friendship and identity with meaningful work. How can we rethink the equation for loyal and generative partnership between individual and organization?

6. The role of the corporation

Extending the traditional role of the corporation, especially the global corporation, to be more commensurate with its impact. (Is there also the need to create a shared understanding of the reality of the role of the corporation now?) If national governments are weakening in an era of growing globalization, will global corporations become more exposed? How do global corporations act responsibly in situations where the rule of law is deteriorating and economic power effectively supersedes political power? What can be learned from efforts such as The Global Compact about the feasibility and impact of initial moves in this direction? How can global corporations better understand what determines their “license to operate” and their “license to grow”? How can they use their visibility to be a more positive force in a complex world?

Complex, interdependent issues such as these are increasingly shaping the context for strategy. Yet the pressures created by these issues tend to keep leaders in a continual doing rather than reflecting mode. We believe that the tools and methods, and as important the quality of relationships and common concerns within the SoL community, can create unique opportunities for leaders to meet and genuinely “think together,” the real meaning of dialogue. Sustaining this opportunity may be vital in developing new capacities for shared understanding and coordinated action.

We, the sponsors and stewards of the SoL global organizing process, want to continue to develop SoL as a global, enabling network where dialogue, research, collaborative action, and learning around such issues takes place at many levels, and continues to include global corporations and global not-for profit institutions; local enterprises, governments, and NGOs; and interested researchers and consultants. We believe that SoL’s diverse membership and the commitment of members to creating and maintaining a reflective and action-oriented learning environment can be of enormous value as major global enterprises are faced with decisions that not only affect our own performance but have consequences felt around the world.

We invite you to join your peers in conversation to develop a new appreciation of the issues you face and the new options that emerge from a diversity of perspective.

Sincerely,
Global SoL Network Stewards

PART TWO

Lessons, Failures, Frontiers

FEATURE 12.4

30 Years of Building Learning Communities

A Dialogue with Peter Senge, Otto Scharmer and Darcy Winslow, Part I

Although the Society for Organizational Learning was founded 15+ years ago, its roots go back almost 30 years. In this conversation, Peter Senge, Otto Scharmer, and Darcy Winslow look back at SoL's earliest form as a single program ("Systems Thinking and the New Management Style") and its evolution to its current state. In addition, they reflect on the role of individuals in systemic change, the ways in which we can leverage our impact as individuals and communities, and the essential role of cooperation and collaboration in sustainable organizational and global change. They consider what it takes to shift from "ego-system awareness" to "eco-system awareness," a shift they agree is fundamental to effecting sustainable change. Throughout the conversation, references to SoL's own capacity for development, and the evolution of related networks like the Presencing Institute, serve as a microcosm of every system's struggle to adapt and sustain itself.



Peter Senge

DARCY: The idea for this dialogue was to reflect a bit on SoL and the Presencing Institute as learning communities, and on how those communities are going to be helpful in tackling some of the issues that we are facing over the next years or decades. What are the main trends you are seeing in the world, and what are some of the leadership capacities that we will need going forward?



Otto Scharmer

OTTO: SoL was founded more than 15 years ago, in 1997. And before that there was the MIT Organizational Learning Center [OLC]. When was the OLC founded?

PETER: Well, before that was an MIT research program called "Systems Thinking and the New Management Style," which started in the early 1980s. Gradually, more and more companies became involved. Then we had this idea to form a formal center at MIT around 1990, not just an individual program. Eventually, out of that, SoL evolved. So it has been almost a 30-year journey.



Darcy Winslow

OTTO: So a 30-year journey. And 20 or 22 years of that have been as an intentional action-research community. That's an intriguing piece of data. I would be interested, Peter, if you could name the two or three most important accomplishments over those 30 years. What came into the world in this period? What have been the most important accomplishments? Also, what are the failures? What have we failed to bring into the world so far? What are the frontiers where our efforts have not resulted in the accomplishments that we would like to see?



Five Accomplishments

PETER: When you ask what's been accomplished, three things jump out at me right away. First is the clarification of ideas. You have to remember that when all of this started, there was no five disciplines framework. I'm sure you could trace a similar crystallization around the basic ideas of Theory U. You have to work at something for a long time until it gets simpler and clearer.

And then, to me, ideas without tools don't mean much. So there are all the different methods. Last, all of that work needs to be grounded in application projects. It would be easy for me to tell the story of the last 15 years or longer just in terms of a series of remarkable on-the-ground undertakings that involved many different people through which we built that practical knowledge.

OTTO: Certainly these three accomplishments resonate with me. Looking at this or that part of the history that I participated in, what also comes to mind are capacity-building mechanisms. A big focal point of our work – and also a real accomplishment – has been creating a shared knowledge base and different environments for building

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individual and collective leadership capacity. It is one of the few things we know how to do well.

A fifth accomplishment is community. So, yes, there is application, and yes, there are living examples. But then, more than that, SoL and the Presencing Institute have linked these ideas, methods, and tools to many people who are building their own things with them and who, in a more distributed way, are connecting with each other and forming their own communities.

As you know, community building is a lot of trouble and presents many problems. But when you step back, what you see today is that the SoL

network and the Presencing Institute network – which to a large degree overlap – are actually a part of something larger, almost like a global movement or an awakening that has to do with bringing together science, consciousness, and profound social and institutional change. The combined, interwoven networks of SoL and the Presencing Institute have played a positive role in helping this fragmented body of practitioners and ideas and conversations and so on become a little bit more connected.

We all know that a lot more is necessary. But that sense of community is another important accomplishment.

PETER: It's easy for us to take it for granted, because we all have been involved in this effort for so long. But people often say that they can feel a certain spirit as soon as they come to one of the SoL meetings. It is not unique to us, of course, but it really is the spirit of community. I always remember a man from Europe saying at an early SoL gathering, "I have never been around a group that is so enthusiastic and so self-critical."

What allows a company to adapt in the face of significant changes in its environment is this capacity of community.

This spirit of community is absent in so many efforts. I find it particularly ironic when people are dealing with big, socially relevant issues and don't build community.

It's a tragedy because often when people are dealing with meaningful stuff, they get completely caught in a sense of urgency that dominates. There is a subtle energy of reactivity, which is understandable. When the problems are big, it's easy to feel like you are pushing this giant rock up a huge hill.

But the energy of community is much more self-generating. You fall into a mindset of trust of one another and beyond: you know that you don't have to figure it all out. You just need to keep working together with others. And out of that working together, you build relationships and confidence that, through our understanding of and our real concern for each other, things will emerge.

From Learning Organizations to Learning Communities

OTTO: Also, what comes to my mind is that when I arrived at the Organizational Learning Center in 1994, you already had shifted. After *The Fifth Discipline* was published, you became known as "Mr. Learning Organization." The concept of learning organizations was kind of the primary header. But whenever I look at what you really did, it was never that. It was always building learning communities, something that goes beyond the boundaries of organizations.

Maybe you could talk a little bit about that distinction, because it refers to an important learning: that you cannot build a learning organization without that kind of community. How did the evolution happen, from your viewpoint?

PETER: There were a couple of threads to it. One was a series of historic studies, starting with a Shell study of long-lived companies. The headline of that study was that, when all is said and done, the businesses that last for many, many generations do so because they are a "human community." What allows a company to adapt in the face of significant changes in its environment is this capacity of community, which enables adaptation through its relationships internally and with the larger communities of which it is a part, whether they are the communities where people live or the networks of organizations that together accomplish the work of the business, such as suppliers.

So that was one part of it. And then there was the practical part that came from working on many projects, where you saw again that it was teams and larger communities of people that accomplished miracles. This was critical because an important criterion for me regarding knowledge is outcomes. How do you know you know something? You do something, right? How do you build confidence that your tools work? You use the tools and see what people are able to create. So this bias toward the practical and suspicion of ideas for their own sake has always made us . . . what's the right word from the church?

OTTO: Heretics.

PETER: Heretics. Exactly. We're heretics in the academic community. And, you know, a heretic is not an atheist.

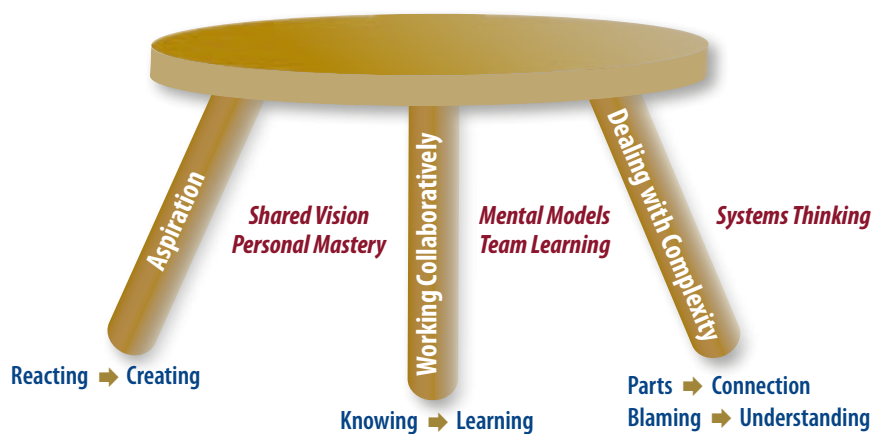
OTTO: It's worse. [laughter]

PETER: I am sure that often seems true. They stay in the church, and yet they keep their radical ideas. I think that is true for both you and me. And one of the basics of our heresy is that we don't just believe ideas. We only believe ideas that we have seen have practical consequences.

This bias toward the practical and suspicion of ideas for their own sake has always made us heretics in the academic community.

This was the second reason this idea of community became so powerful within SoL. You would have these practical projects, let's say on product development, as were some of the early projects. But they didn't involve the management team or any one well-defined group. They engaged an amorphous network of people who ultimately

The Core Competencies of Organizational Learning



Sample tools and methods of organizational learning

Vision & Sharing	Quality of Conversations	Exploring and testing frames and assumptions	Iceberg – levels of perspective
Coaching	Ladder of Inference	Kantor's four-player model and four dialogic practices	Causal Loops
Visualization	Pathways to learning		Reinforcing and Balancing Loops
Centering	Left-hand column		Systems Archetypes:
Choosing	Check-in/Check-out		• Fixes that backfire
Creative Tension	Advocacy/Inquiry		• Shifting the burden
	Container building		• Limits to growth

got involved and became instrumental to what was accomplished.

So you start to see again and again that the real groups that matter are never the formal structures, the formal teams, the formal management. They include those but are much broader. Practically speaking, the best term for them is communities or networks of collaboration.

Organizations are too small for the big problems and too big for the small ones, where you need a nimble, targeted approach.

That just kept showing up again and again and again. When we were going through the long, almost two-year process of creating SoL separate from MIT, the one idea that became an anchor was helping people organize themselves in communities. For me and many of us, our core aspiration concerned change at a scale that really matters, that could make a difference in the world. And I remember one morning it just came to me: a global network of all kinds of different learning communities could really have an impact at scale, perhaps in a way that nothing else would.

So the importance of learning communities came from many different places.

Ego-System Awareness vs. Eco-System Awareness

OTTO: I remember what drew me here in the first place were some of the writings that came out of the Organizational Learning Center. For example, when you looked at the five disciplines, with the inclusion of personal mastery, you could feel an openness and the possibility of a conversation or kind of inquiry into the consciousness dimension of change. It was already there, but it was implicit. It was not explicit. But you could already feel it.

The other thing that attracted me was the research community. Yes, Peter was directing it and it was organized to a large degree around the five disciplines framework. But then you had others working on dialogue. You had Ed Schein involved, Chris Argyris, Bill Isaacs, Daniel Kim. You could feel these different frameworks coming together, all in service of a larger intention – an action science in the service of the evolution of the social whole, rather than just revolving around itself within some kind of academic virtual walls.

When listening to you, Peter, it reminds me that I once heard someone say, you know the problem with the nation state: it's too big for the small problems and it's too small for the big problems. The same applies to companies and to any kind of organization. Organizations are too small for the big problems and too big for the small ones, where you need a nimble, targeted approach.

So that's another dimension. You start with some of these bigger institutional entities, then you realize that to make headway you need to reach out. When I arrived in the mid-1990s, there was no real mention of cross-sector collaboration. It was all corporate. And it was not even start-ups or small businesses. It was all big Fortune 50 or Fortune 500 companies.

Look at the work and the community now. There is an awareness of the whole dimension of entrepreneurship, social entrepreneurship, and cross-sector partnerships. There is an acknowledgement that, in order to move the economy from being driven from ego-system awareness to eco-system awareness, you necessarily have to collaborate across sectors.

Darcy, the Nike story is one of the prime examples: how in working with NGOs and in working on societal issues, you can transform these relationships, and how good leaders need to think across the value chain rather than stopping at the boundaries of your own organization. The same story plays out in other industries as well. Nike just happened to be a pioneer.

DARCY: Well, thanks for saying that, Otto. The impetus for how that started came out of Nike's introduction to Peter and SoL and a lot of the frameworks back in the late 1990s. When I share the story with others, it all comes back to becoming part of the SoL community and the thought leadership and vulnerability that we came together with. I mean, we didn't know what we were doing. We didn't know how big the issue was. There was not a framework at that time, and we didn't know what the end goal was.

So helping to establish and create some of the language and ideas around what it meant to be a sustainable organization or a company for the 21st century gave us a way to embrace the challenges that we faced. Without SoL, I don't think Nike would be where it is today. I know I certainly wouldn't have the wherewithal and ability to sit with the questions I sit with today had it not been for that learning community – and the extension into the Presencing Institute and how it comes together around the SoL Executive Champions' Workshop. These events are milestones in my life every year.

OTTO: Darcy, what made the difference for you and for Nike?

DARCY: It was the creation of the Sustainability Consortium as a subset of the SoL community in 1998. There were just a handful of companies back then, Nike being one of them. Peter, you may be able to list them.

PETER: It was initially Ford/Visteon, HP, Shell, DTE, Harley Davidson, BP, and Nike.

DARCY: Right. And from the first meeting, coming together and meeting these people, there was no competition among us. As leaders within those companies – some with titles and some without – we were trying to make a difference. The Sustainability Consortium created a safe haven for us to come together and show our vulnerability and our lack of understanding of a clear path forward for

how we were going to institute this massive change effort within our companies.

Through that process, through the years, through more companies coming on board, and through building deep relationships among the people within the Consortium, we created a phenomenal resource. When I would hit these brick walls, people within the SoL Sustainability Consortium were the people I went to outside the company to build up the courage to step over that next threshold. It was the most critical resource I had to draw on to be able to do some of the things that we did within Nike.

The Consortium lasted up until about 2008 formally. Over that time, more and more companies were coming to the Consortium to hear these stories, to have that kind of a resource to draw upon. But Nike had started to move into the next phase of sophistication of our work, and we were no longer able to draw from the Consortium. That's when the Consortium started to fade into the background and something new began to emerge. That's one of the reasons for the founding of the Academy for Systemic Change. It's one of the next evolutions of elevating our game, elevating our conversation, elevating our ability to transform and affect some of these critical systems at scale, at a level that is really going to make a difference in the short term.

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Failures and Frontiers

OTTO: Maybe that brings us to the second part of the opening question, which is about the failures and the frontiers.

PETER: Despite all of our accomplishments and despite what we might feel good about, the world

goes along its unsustainable course. And, by and large, the vast majority of people have no clue, nor do they see much evidence that these things that we see changing are actually changing. Quite the contrary – there is more fatalism and pessimism today than ever.

We have not yet found the way to make sufficiently explicit the developmental aspect of the work.

I always thought in doing this work that it would take multiple generations. [System dynamics pioneer] Jay Forrester had the same attitude, so I inherited that from him, the idea that the really big changes unfold over many decades and generations. I never expected people to read a book, like any of *The Fifth Discipline* books, and go off and start changing things. It is one of the reasons for building communities, to help sustain a process of change.

And I have mixed feelings saying this because, well, this is a great self-fulfilling prophecy. You assume it is going to take a long time. Therefore,

when nothing much changes at scale that matters, you can say, “Oh, well. See, it’s what I always knew would happen.”

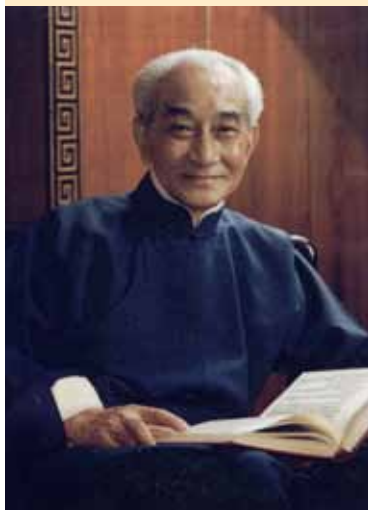
Be that as it may, I do think that’s definitely a shortcoming, because we don’t have forever to go along at the pace we have today. It raises a profound question – one of the hardest ones to really embrace – which is, can you accelerate things at all?

When I visited Master Nan, he often took me to task. He would say, “You just want to save the world.” And I would go, “Yeah. Right.” He would kind of shake his head. In one of the last exchanges we had, he said, “You cannot accelerate things. Do not try to accelerate things.” He went on to say, “There’s an old Chinese saying that the night is darkest the last hour before the dawn. It’s a good time to meditate.”

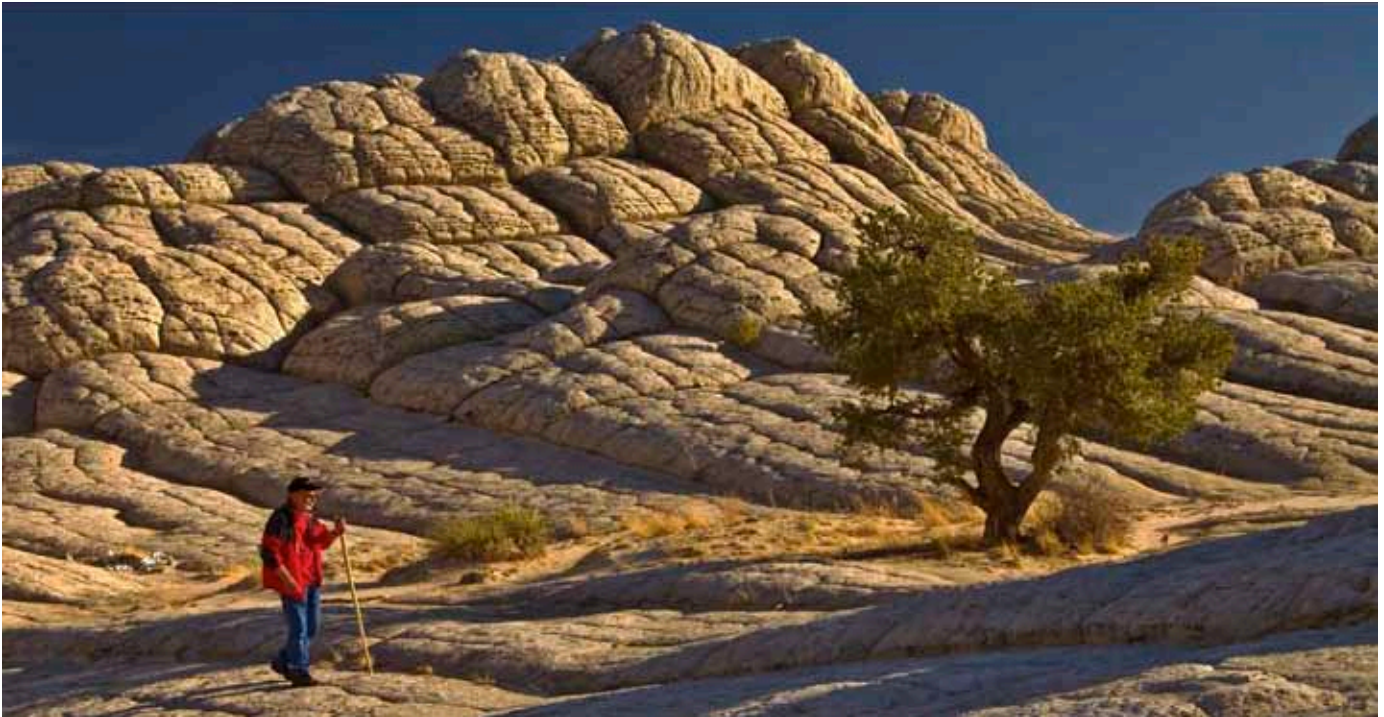
On the other hand, this is hardly a guy who did nothing in his life. He was busy doing all these things to bring about change. So there is a real paradox here. The simplest way I can express the paradox is, it’s easy for our ego to get attached to doing something significant – and to think that somehow “I” must or “I” can or “I” will do something to be the difference at a scale.

I wrote down two things when you asked about the failures. One is scale, and the second is that we have not yet found the way to make sufficiently explicit the developmental aspect of the work. [Harvard developmental theorist] Bob Kegan uses a great metaphor. He once said, “Well, I don’t really write about spirituality. But it is sort of a dog whistle in my work. You know, a dog whistle can only be heard by dogs.” He said, “There’s a message, but only certain people hear it. And it doesn’t distract everybody else.” To some degree, it is probably true of all of us. We don’t use the words “spirituality” or “spiritual.” We do talk about human development. Even that gets tricky sometimes, because people can react strongly – for example, those who think this is the business of religion.

Master Nan Huai-Chin



Nan Huai-Chin (1917–2012) was a spiritual teacher and a major force in the revival of traditional Chinese culture in China. He wrote more than 60 books, which have sold tens of millions of copies in China, mostly on the black market until the past decade. Only a few of his books have been translated and made available outside China. His death in September 2012 was a major national event in China.



Going forward, we have to learn how to be more explicit. I believe that Theory U and all the subsequent work it has generated is a big step in explicitness. As you said yourself, Otto, you could go back and find different things – whether it is personal mastery or talk about the implicate order – in the early writings in this territory. But that’s all they were. They were like the dog whistle. They were a little thing here, a little thing there. If somebody was on that wavelength, they would go, “Aha! I understand that relates to this and this and this.”

Theory U is much more explicit. It leads me to wonder if there is a next stage in explicitness or directness. Maybe another word to use is “demystify.” Because one of the things that keeps us from being as explicit as we need to be about deep development is we tend to mystify it.

You now use the word “consciousness” a lot, Otto. I don’t think you used to use it nearly so much, or maybe you’ve used it for a long time and I hadn’t noticed it. But a couple of years ago, I heard you talk about Theory U as a particular theory and method that is all about “awareness-based” change. That is a good example of being more direct.

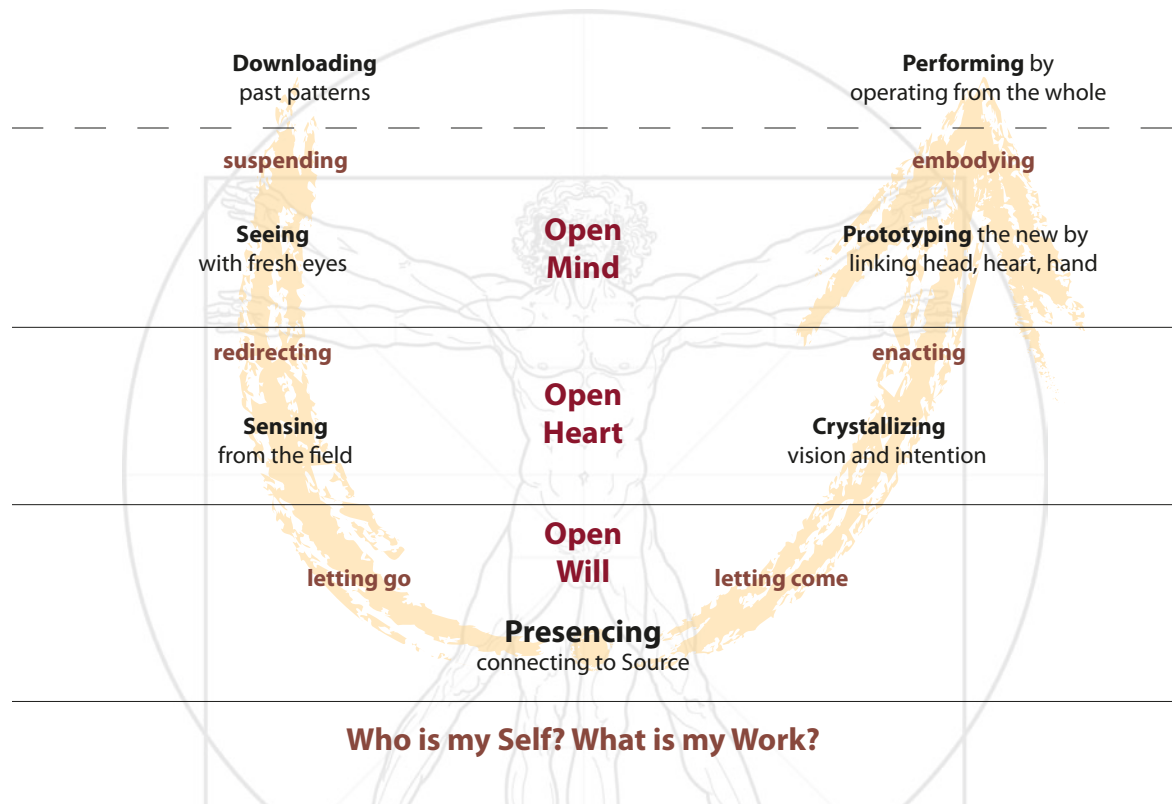
Collective Karma

DARCY: Peter, can I just jump in here. You mentioned Master Nan. And you shared one other statement, maybe one of the last he made to you. It was something to the effect that “Collective karma cannot be changed by one heroic spirit or individual.” That stuck with me. As we look to the frontiers, I interpret that in some profound ways. Can you share a little bit about what that means to you in the context of frontiers?

PETER: Well, it is actually something that Otto and I have talked about as much as I’ve talked about it with anybody. We have entered an era, somewhere in this last generation or so, where deep, individual developmental work or individual enlightenment

We have entered an era, somewhere in this last generation or so, where deep, individual developmental work is not enough. It really is about collective cultivation.

Theory U



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is not enough. It really is about collective cultivation.

I have a little pad of paper from my last visit with Master Nan in April [2012]. And I've gone back and reread a lot of what's there. It is amazing. It's so clear and so relevant. One of the statements was just what Darcy said: "Collective karma cannot be transformed by heroic individual action." Collective karma would be a good way of describing our predicament, right? We've inherited a whole set of structures and assumptions and ways of operating. And we pass them along, embedded in

our schools, businesses, governments, markets, and media.

The term "karma" is easily misunderstood in the West. Again, it doesn't have to be mystified. It just acknowledges that when a human being comes into existence, there is something more than a sperm and an egg. There is some inheritance that comes with the human being. If you don't accept that, how the hell is every single person so different? Two people could have the same mother and father, it doesn't matter – they can be totally different people. You know, from saints to the ultimate sinners.

So clearly, there is something beyond the effects of our environment. In Eastern traditions, they call it "karma." But you can also say it is deep seeds we bring with us into life in some form or other.

The whole systems viewpoint in effect says that the same thing happens collectively, that what

we've built up goes beyond the lifetime of a single leader or leaders and is transferred directly through culture, language, and who knows how many other ways. This could be collective at the level of an organization or a society. It can be visible like how we talk or dress, or very subtle.

For example, somehow, somewhere over the last three to five thousand years, we've decided human beings were the most important species. There is a hierarchy of importance, and human beings are at the top of the hierarchy. It is not just that we have certain features that other species don't have. There is us and there is everybody else. And this worldview comes with a deeper notion of profound separateness: We are separate. We are different. We are apart from the rest of nature's creations. There are many cultural nuances, but beyond the individual cultures is this idea that human beings are separate and somehow more important.

That's collective karma or collective inheritance. And we are going to have to collectively cultivate a different view. I think that that's partly why Master Nan was always needling me about my kind of ego-based orientation to save the world.

But it's a genuine paradox. Because the opposite is not the point, you know, do nothing and let everything just go the way it goes because there is nothing you can do at all. We have always understood the importance of collective cultivation, at least at the level of team, such as in team learning and building shared vision. But the way that the Presencing tools get at this is more direct and is a big step, because they explicitly address collective sensing and co-creating at multiple levels of aggregation.

Again, I wonder if they aren't other steps coming.

A Change to Our Collective Story

DARCY: One way to express this is that, as a society, we are living out a story. How do we start to change our story? How do we start to change our trajectory, our collective karma, personally

or in community with others? And what are your thoughts on the impact the SoL community and the Presencing community could have over the next five, 10, 15 years?

Seeds start so small. And suddenly, when we look over the field, we see sprouts coming up. That's exactly where I feel we are as a global movement.

OTTO: Coming back to Master Nan's statement – yes, individuals cannot change collective karma, but together we can. And the together starts, interestingly, with individuals. The actual process has a lot to do with paying attention, opening up your awareness, going to the edges of the system and of yourself, and creating a space where we can venture with each other in a safe, exploratory way.

What happens in the spring? You see nothing. Seeds start so small. And suddenly, when we look over the field, we see sprouts coming up. That's exactly where I feel we are as a global movement. All of the depressing things that are going on, and everyone who is not in denial can only be cynical and depressed. Yes, that is all true.

At the same time, when we look at the opening of the heart and the transformation of relationships, we can create generative fields of connections. We have developed methods, tools, frameworks, and examples, through which, starting with very small groups, we can attend to each other and to ourselves and to our environment in a way that gives rise to a new connection between the part and the whole.

[Philosopher of science] Henri Bortoft said, "The whole is presencing itself in the parts." So that means the key to the future is this extended awareness of the connection to the whole. The whole is living within me. What I'm doing is

informed by the presencing of the whole through me. At the same time, I'm holding the space for others to move into that same space. There is an enormous power in this collective practice that we can bring into reality in a much more intentional way.

Our Critical Development Edge

DARCY: If we look at the future of learning communities – SoL and the Presencing Institute are

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just one expression of those – what is the critical development edge going forward? As a collective community, as a collective learning community, what are we? What do we need to pay attention to with regard to our own development?

PETER: Well, that's the question. We all have to learn what to pay attention to. To me, in general, it's pretty simple: What enhances life and what doesn't? And become a student of what enhances your sense of life and energy and purpose and what doesn't, and be ruthless in following what works and eliminating what doesn't work.

The significance of being a community is that it's hard work. We need to help each other. We've got to stop screwing around. What if we imagined that what we are doing really matters, not for us but for our kids and our kids' kids and for life and for the future generations of all species.

Imagine it actually has significance. You would start being much more diligent in paying attention to our own thoughts and actions – all the time, not just when we feel like it. Do what works. Don't do what doesn't work. You don't need to know anything else.

DARCY: And, what do you love? What do you want to conserve? Start there.

OTTO: First, there is a big need for noise reduction mechanisms. That's where community comes in. How do we reduce the noise and connect with what's most essential? What is noise? What remains when all the noise is gone? So that's certainly a big need and has a lot of momentum already in small ways.

The second part has to do with creativity and entrepreneurship. Does the technology that we are creating enhance life and creativity? The word "technology" goes back to the Greek word "techne," meaning "art." So technology really goes back to creation. If you look at how we use technology today, it is to some degree creativity diminishing and to another degree creativity enhancing. To

reconnect with the essence of technology and art means to cultivate those things that help us tap into our individual and collective sources of creativity.

And the third part has to do with co-sensing. Co-sensing is making meaning across boundaries and silos. An image that comes up for me is society as a collective brain. The way we organize society today is that we have all these silos, and the neuronal connections aren't there in this collective brain. So that's why, in the U-Process, the sensing and paying attention are done in real time together. But we haven't built institutions or collective practices that do the same thing for society as whole. You know, human awareness that doesn't have co-sensing cannot move from "ego" to "eco." It is as simple as that. And those are the institutions that are missing.

Darcy's story about Nike and what happened in the SoL Sustainability Consortium is a foreshadowing of what's possible. But we need to be much more intentional in bringing the players together and into experiences that allow the shift from ego to eco to happen in a more reliable way.

In my view, co-sensing is not picked up enough. When it is picked up, it is not done well, because people think they can move over it and get to the cool "connecting to source" and so on. They don't realize that the problem they have later on in the prototyping actually starts with the quality of their co-sensing. You can't fix it by tinkering downstream. You have to start earlier.

DARCY: It goes back to your comment about the noise in the system. I still have both of you to thank for bringing that to the forefront through a story that you shared in the book *Presence* and for the introduction to John Milton. The first sacred passage I did was because of that book.

The biggest message and gift I got from that solo was to let the noise go away. When I did, I immediately knew the direction I needed to take for essentially the rest of my life. We don't give enough space and time to allow that noise to go away.

How can you possibly be of any real use as a leader on a larger scale if you can't lead yourself through the thicket of your own emotions and thoughts?

PETER: The idea of eliminating noise and distraction is a transcendent message. When you are serious about any deep developmental process, that will become a dimension of it. It doesn't matter what the tradition is or the method.

The irony, of course, is a lot of noise is pretty powerful stuff. The image of noise makes it sound like it's a bunch of bad traffic noise in the background. But a lot of times, the noise is what is dominating us emotionally. It's the stuff that totally occupies us, either because it is tapping our fear or our greed or whatever. You wouldn't normally use the term "noise," but it is noise relative to the deeper state of pure awareness.

DARCY: And I think that is what it is. It is not that the noise goes away but rather becoming aware of what is noise and what is important.

PETER: I believe we need regular practices or disciplines to do this well. This morning, I got up to do meditation, and it became evident as soon as I started that I was pretty agitated. Quickly, I realized certain areas in my body were tight. Almost always, when I'm worried about something, it shows up in particular physical conditions. And so then I could just look at the thoughts and become aware of them. I did a little tai chi, and I got clear that all I had to do was keep my awareness in my feet and everything would be fine. It was amazing. The whole thing just was gone.

So we all have our own inner choreography, our own ways of doing this. But there's a progression from not being aware of the emotion but seeing it as a physical area of tension, to identifying the thought and the emotion that went with it, to

then realizing that I could just move beyond this by really getting in my body.

Because I'm the sort of person who, whenever I'm stuck, I'm stuck in my head in one way or another. And the answer is, get into your feet. Stand. That's a noise reduction mechanism. That's having some ability to move into noise, particularly when it is really loud, and letting it transform itself.

I don't really care what the hell your discipline is, but you need to have one. Find the spiritual tradition that speaks to you right now, and maybe a different one will speak to you in five years. It doesn't really matter.

But how can you possibly be of any real use as a leader on a larger scale if you can't lead yourself through the thicket of your own emotions and thoughts – and you get tied up in knots by anger, fear, and tension? This is an old, universal idea. And we have to be a little more direct about it.

DARCY: My last question is, what else do we need to consider?

PETER: Stop screwing around. That's it.

OTTO: What we need to consider is that the noise reduction mechanisms are most importantly missing on a collective level. We have plenty of mechanisms on the individual level, as Peter mentioned, that have emerged from all the wisdom traditions of the world. But what we don't have are the collective noise reduction mechanisms – infrastructures and practices that help us to co-sense and presence what matters to the future of our community. What we have today are collective noise *amplification* mechanisms, for example, commercials. When you go to Bhutan, you meet a society without advertising and commercials in public spaces. That's a first example of collective noise reduction. But much more is necessary.

I was just involved in the launch of the Global Wellbeing and Gross National Happiness Lab with the prime minister of Bhutan as one of our patrons. The Lab, co-convened by the Presencing Institute and the German Ministry of Development Cooperation, brings together change makers from Bhutan, Brazil, India, China, the US, and Europe to "innovate beyond GDP" in order to reinvent our economy from noise amplification to noise reduction. How can we transform the positive energy of the noise to a higher level of awareness? In that spirit, let me shut up here... ■

ABOUT THE AUTHORS

Peter Senge is the founding chair of SoL, a senior lecturer at the Massachusetts Institute of Technology, and the author of *The Fifth Discipline*. He is also coauthor of *Presence: Human Purpose and the Field of the Future*, *The Necessary Revolution: How Individuals and Organizations Are Working Together to Create a Sustainable World*, and the series of *Fifth Discipline* Fieldbooks, including the newly released *Schools That Learn*.

Otto Scharmer is a senior lecturer at the Massachusetts Institute of Technology and the founding chair of the Presencing Institute. He is cofounder of the Global Wellbeing and Gross National Happiness Lab, author of *Theory U: Leading from the Future As It Emerges*, and coauthor of *Presence: Human Purpose and the Field of the Future* and *Leading from the Emerging Future: From Ego-System to Eco-System Economies* (July 2013).

Darcy Winslow is managing partner of the Academy for Systemic Change and founder of Designs for a Sustainable World Collective, LLC. She worked at Nike, Inc., for more than 20 years and held several senior management positions within the business. Most recently, she served as general manager for Nike's Global Women's Fitness Business and as senior advisor to the Nike Foundation.

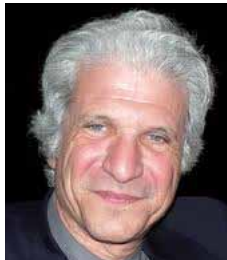
PART THREE

Listening to the Field

FEATURE 12.4

Voices from the Community

In October 2012, we sent a set of questions to members representing SoL's diverse constituencies. The intent was to give respondents the opportunity not only to share but also to celebrate the benefits and achievements they have enjoyed as members of this extraordinary organization. Our hope was that their responses would provide a rich array of stories and experiences demonstrating SoL's value. They did not disappoint. We were delighted, but not surprised, to learn first-hand of the commonality of purpose and depth of commitment to SoL's vision and principles that characterized each response. Perhaps most heartening and uplifting were people's responses to the question, "*What are your highest aspirations for SoL?*" SoL members, it seems, want nothing less than for its organization to be *the* global presence that stewards a sustainable and healthy future for all of humankind.



MICHAEL SALES

Principal, Art of the Future and Co-Chair, SoL North America

Association with SoL

SoL has been a critically important resource for me since I joined as a consultant member in 1999. It was through SoL that I met my partner, Anika Savage. It was through SoL that Anika and I first piloted our Structural Dynamics Process to an appreciative audience of thoughtful colleagues, who helped us to improve our offering. It was through SoL that we refined that process into both our Environmental Seminar and our Healthcare Seminar. SoL was instrumental in the birthing of Art of the Future, the strategy consulting firm Anika and I have created, which has been one of the real highlights of my professional life.

Standout Moments and Insights

SoL has also been a tremendous source of inspirational colleagues who've become friends and teachers. There are so many of them that it would be impossible to create a full inventory of the SoL-connected people whom I am delighted to see and talk with. The kind of thoughtful discourse I have come to expect from SoL colleagues got codified by seven of us into a monthly dinner group that has been meeting to inquire into all sorts of matters for more than 10 years. This gathering has proven to be a fantastic by-product of my involvement with SoL.

The courseware that I've been exposed to through SoL, e.g., Foundations for Leadership and the introduction to systems thinking course, has been truly excellent! I would wholeheartedly recommend these courses to anyone, both in terms of their content and their processes, which take learners deep into themselves and into a connection with the course community.

Finally, the importance of the raw information sources available through SoL, e.g., the articles in *Reflections* and books like *The Fifth Discipline* and *The Necessary Revolution*, cannot be overstated. I think on a planetary level, and I am always looking for pathways that enable me to apply and expand my idealism in a highly practical fashion. Looking at the thought and action of my colleagues through publications such as these has been a constant source of enlightenment and encouragement.

Milestones

The Consultants' Convergences that occurred for a number of years were a terrific innovation, and I look forward to seeing those rebooted in the years ahead. These have been a great testing ground for new ideas and for capacity building. Similarly, the SoL Global Coaching Community has made a real difference to its participants, and I was pleased to be engaged with that activity, which advanced my own practice. Also, the annual meetings, such as the one in Detroit several years ago, were absolutely terrific. Finally, I was fortunate enough to attend a multi-month course offered by Rick Karash, through which he demonstrated how he delivered SoL's systems thinking course. It was an incredible gift from a very talented teacher and caring person.

Leverage Points

SoL should reach out to the media and to politically active people in an assertive and targeted way and offer them training in systems thinking, with an emphasis on causal loops and stock and flow analysis. Many reporters and politicians speak in terms of systemic dynamics and feedback loops, but they don't understand the value that would come from using simple graphics and the archetypes to explain these matters to others. I would love to see a strategy group in SoL identify 100-1,000 specific individuals we could contact over the next three to 10 years to offer them new ways of thinking about old matters.

I would like SoL to develop an inventory of people it wants to know in the environmental movement and the educational world. Clearly, we are already doing that through the Sustainability Consortium and the SoL Education Partnership and other efforts, but I'm referring to a different type of scanning. This sort of targeted outreach effort just won a presidential election. There ought to be some way that any SoL member looking at a website or reading an article could say, "Oooh-oooh! We gotta get this person info about SoL! We gotta get her on the mailing list! We need somebody to call her up and interview her for *The Flash* or put a video clip of her on the Facebook page!"

Highest Aspirations

Ah, the pleasure of dealing with such a small question!

In their 2011 article, "Communities of Commitment," Claudia Madrazo and Peter Senge quote the great planetary thinker R. Buckminster Fuller in saying that humankind is facing its "final exam." It is one that we cannot flunk, and I happen to think it's coming up sooner rather than later, probably sometime in this century. My highest aspiration for SoL is that (1) it be widely thought of as a resource that is going to help humanity pass this exam, and (2) it become a repository of people, ideas, and tools that are widely disseminated and used by people all over Earth to comprehend the complexity of the situation that we're all in together and to take foresight-informed actions that constitute "fixes that work" rather than short-sighted ones that fail.



ÁGOTA RUZSA
Director of the SoL
Institute, Hungary

Association with SoL

I took part in the OLC Core Course in 1995, facilitated by Peter Senge and Beth

Janderoa. Before that, I was an invited participant in the OLC Dialogue Facilitators' Project from

1992–1994, which is where my passion and commitment to dialogue and dialogic process both in facilitation and coaching originated. As a result of this program, I became a member of an international women's dialogue, originally inspired and organized by Juanita Brown. The dialogue took place every year for a long time; the last one was in Hungary in 2003. As an offspring of that program, we initiated a Danube Dialogue. We have already had two and will have the next in 2013.

I personally became involved with SoL in 1998, and then was invited to be one of the stewards in the process to form Global SoL that was coordinated by Göran Carstedt. Since then, in my region of Hungary and central eastern Europe, I have been active in sharing the knowledge and capacities related to SoL and in developing learning communities. Since 1998, my colleagues at SoL Hungary and I have organized regular SoL events. In 2004, we held a conference with Peter Senge and Ervin Laszlo on Learning Organizations for Sustainability. Since then, we have also held a SoL European Sustainability Group gathering and the Sustainability in Action course. With the assistance of Guus Geisen in education and Christoph Mandl in business, we at the SoL Institute have placed more emphasis than ever on developing collective understanding in how systems thinking can enhance our capacities in society, education, and business.

Standout Moments and Insights

The Core Course. It was the inspiration, commitment, and depth that I had never experienced until then. The five disciplines echoed my understanding of and affiliation to the “mission” I am here to embody. Coming from the central European “intelligentia,” I also met people from the business and corporate worlds whom I had never come across before.

Our Global SoL Steward Meetings. In these gatherings, I relished the unfolding of our differences, the potential of dialogic conversations, and the even higher potential of what we might become able to generate together.

The First European SoL Event in France. Here, I experienced a “joie de vivre” as we as a group explored new, promising, trusting, and creative energies and desires to bring the social impact of SoL to a larger scale.

For a long time, SoL has served as a “spirituality in action homeland” for me, where I can return when feeling dried out and thirsty, when losing

hope and inspiration. I know there have been a lot of other great initiatives, yet what really held me in SoL was the lack of wanting to jump on the bandwagon of the latest trend or of moving into a money-making initiative. SoL has kept the potential of sustained learning alive through its core principles and disciplines. In addition, SoL has become a generative, gracious, and life-sustaining mother to many new lines of thoughts and initiatives.

Milestones

The first milestone was the exciting process when the OLC turned itself into SoL. What a generative and creative energy it must have unleashed!

The second was the formation of Global SoL, which opened a new vista for many, although most participants were still from the so-called developed countries.

The third milestone was the expansion of SoL into a second level of global community. With this kind of formalization, the challenge will be to keep and enhance the loose, network-based, living system aspect. I would like to see SoL move away from a Caucasian-dominated and mostly business-based network of corporate and OD people into an interdisciplinary, intersectoral, and multinational-multiracial global organization capable of nurturing a “New Beginning.” The space and potential and vision are there – we just need to make it happen.

Leverage Points

Some of the leverage points that SoL can offer and support:

- Deep Dialogue as originally proposed by David Bohm and as enhanced by the Deep Democracy movement, expanded beautifully with The World Café, and further developed by the Art of Hosting communities.
- Systems thinking as a general and shared public capacity growing from all school curricula and made available to all.
- A view of the world and all her creatures as living entities who have the full right to live and share and develop their capacities.

- A shift in perspective so that the so-called “western world” becomes interested in the materially less privileged not only to help them or offer knowledge to them but to graciously learn from and be inspired by them so that true and mutually supportive partnerships may arise.
- The desire to stay for a while where we are, look around, and see all that needs to be done there. When we do so, we learn to appreciate and “pay for” the things that are currently invisible to us.

Highest Aspirations

I would like to see a true global knowledge and insight-sharing community arise in which stewards offer facilitation in all four corners of the world. So, somebody from India or Hungary

might travel to the US or UK to serve as a reflective mirror and offer insights that might be obvious to them but not so obvious to the local people. This criss-crossing of our talents and experiences could be a large potential contribution to member organizations.

I would like to see SoL launch and get involved in some major large-system change projects, while at the same time seeing and appreciating things at a local level as well.

I would like to challenge SoL to reinvent itself once again to generate innovation and knowledge and to become a soul-inspiring, soul-driven source for people around the world – the Global SoL Academy of Living Systems.



ALFRED HANNER
Internal Organization
Consultant, Saudi
Aramco

Association with SoL

My association began many years ago. As in many large corporations, the company joined SoL, and someone thought that it might somehow relate to the work I was doing at the time, so he shared the information with me.

Over the years, my capacity and relationship with SoL has varied. I've been a company liaison, helped design two global forums, helped create GulfSoL, served on and co-chaired the SoL Council, and moderated and contributed to the Global SoL Ning website for a couple of years. I've practiced this work with 1,200 people in a corporate café, with a half dozen people who wanted to create opportunities for disabled children, and with the top echelon of regional business leaders and the young leaders who are the future.

Standout Moments and Insights

A standout moment for me was sitting among regional and corporate leaders in the red desert sands shortly after sunset following a day of café conversations about the direction of the country. I was moved to hear individuals stand up and commit to spending part of their personal fortunes to provide opportunities for others and to doing things differently because the old ways of doing business were not sustainable. This moment reminded me why I was involved in SoL. After having helped design the café, seeing others carry the torch forward into the unknown reminded me that each small contribution to the greater cause makes a difference, and that all of us can make a small contribution. Our aspirations, once shared, become a powerful force for good.

The greatest impact for me has always been the enriching and rejuvenating gatherings, whether large World Cafés, liaison meetings, global forums, council meetings, or conferences. The energy and passion in the room provided the aspiration to continue my journey and reinforced my commitment to better the world around me and within my organization.

Milestones

The Global Forums would be my milestones. Although I did not participate in the first, I was very active in the creation of the second and third. Bringing the greater community together at one time creates a substantial amount of energy and focus, during both the creation phase and the event itself. The learning and sharing of learnings during these events certainly expands the knowledge base from which the community grows.

Leverage Points

For me, the leverage point comes by providing space for open conversations and sharing techniques and practices that allow people to listen to other points of view. As a community, we have been ineffective in using global technology for our personal or organizational growth.

Going forward, the development of leadership both in SoL and in business is critical for a sustainable future. We must develop leadership that is enlightened to our perspective while at the same time able to listen to and draw on other perspectives. Leadership that understands how to make a difference in the world while making money to provide for the continuing existence of the organization is necessary.

The original concept of researcher, consultant, and practitioner is very powerful, yet we appear to be unable to sustain the model. How do we re-energize the concept, thus providing the field to practice?

If we can balance the stool, it gives us a step up to understand how to develop those living systems that we desire.



IRÈNE DUPOUX-COUTURIER
Vice President and
General Manager,
SoL France

Association with SoL

The first SoL event I organized was in Paris in March 1998. But before then, in my role as manager of CEFRI (Centre de Formation aux Réalités Internationales) in France, I organized high-level seminars for the Shell group in liaison with Arie de Geus, and I followed the evolution of his thought described in *The Living Company*. Then I discovered Peter Senge's book *The Fifth Discipline*, and since the mid-1990s, I have worked on and taught about "the learning organization," implementing the philosophy and process not only in France but also in Eastern European countries making the transition to a free-market economy.

Standout Moments and Insights

The Launch of SoL France in March 1998. Arie had asked me to launch SoL France, and I wasn't sure how to handle it. I started by contacting Jacques Chaize at the Conseil National du Patronat

Français and discovered that several members were interested in this approach. Next, the Institut de l'Entreprise, a French think tank, joined us. At the launch meeting in March 1998, attended by Arie de Geus and Göran Carstedt, we received positive responses from business leaders. The CEO of Solvay France and Italy decided to join, becoming president of the French fractal. The interest by top managers of important companies in this "new approach to management" reinforced my intuition that SoL's work represented a deep-seated movement in our ways of living and managing. It was a first step in my own process of seeing things differently.

The "Joie de vivre" Event in Bordeaux, November 1999. On this occasion, I discovered the strength of SoL's international network, with Peter Senge, representatives of the American network, and representatives from northern and central Europe, in particular Sweden, Austria, and Hungary. That day, and again later at Nyenrode, I understood what an international network meant and how important it was to meet regularly. In response, my friend Lucy Nusseibeh from Jerusalem and I launched the idea of international forums.

Meeting with Alain de Vulpian. In 2003, international sociologist Alain de Vulpian came to see us. Alain is the founder of Sociovision and a member of networks of sociologists in Great Britain, Canada, and the US. His visit was an important moment in the life of SoL. Referring to Norbert Elias, he confirmed that our philosophy and our approach were deeply attuned to current changes in civilization.

Our Working Day with Peter Senge (May 2004) and the Paris Coordinators' Council Meeting (May 2009). These were special moments for developing our understanding of Peter's work, for strengthening our global network, and for learning how to work better together.

Progress within SoL France Companies. This work has made a significant difference for a number of SoL France member companies, including the French-German aeronautical group EADS, which through the five disciplines adopted a winning approach and saved considerable sums of money; the Université Pierre et Marie Curie, the scientific wing of the Sorbonne University group, which navigated through a difficult period by building a shared vision and developing numerous new projects; and the Air Control Centre at Reims, responsible for air traffic over the eastern third of France, which developed a shared vision that is still their "management method." Perhaps the most moving moment, though, was when the teams responsible for managing the "Mad Cow" drama in France came to see us to ask how they could adopt systemic thinking to try to avoid such catastrophes in the future.

Milestones

Events

In addition to the standout moments listed above, the Global Forums in Helsinki, Vienna, and Oman represented true milestones.

In Helsinki, we learned from our Finnish friends and from the dynamism of the young members of Team Academy.

Vienna was perhaps the most impressive forum, "a symphony of innovations." On a suggestion from Finland, the design team opened the forum with "learning stories" (40 of them, from all over the world). Afterward, the keynote speakers underlined what we learned through these stories.

In Oman, we worked on the meeting of cultures and "how to bridge the Gulf."

Other Ways of Disseminating the Work

- Publications such as *Reflections* and *Cahiers de SoL France* give storytellers a forum for diffusing the principles of learning organizations and learning from action-research case studies
- Thematic labs
- The Liaison Officers' meetings that have created a network of change agents in organizations around the world

Leverage Points

Everything is changing in the world. SoL as a philosophy, a process, and a space is at the heart of this movement. We must look for ways to help set our society on the right course.

To address these issues, we have to:

1. *Deepen our research and action research* on an international level, have globally diffused publications and enlightening concrete examples, and make connections between these examples, perhaps through a global fieldbook.
2. Share the stories, continue regular meetings and forums, and create dialogue in social networks. *SoL is a network of networks* of change agents and catalysts of metamorphosis.
3. Create a global network of companies, the *Global Circle of Companies*, where they can share learning experiences.

Highest Aspirations

To help our society to make the right bifurcations, relying on socioperceptive people and change agents.

To catalyze the necessary metamorphosis of companies and organizations, enhancing human values.

SoL Global Coaching Community of Practice



JEFF CLANON
Partner, Systems Perspectives LLC



RICK KARASH
Owner, Karash Associates LLC



HEIDI SPARKES GUBER
Founding Partner, Fourth Quadrant



MIRIAM HAWLEY
CEO, Englightenment, Inc.

Association with SoL

Rick Karash and Jeff Clanon both were on the design team that created SoL in 1997 and both have been associated with SoL since that time as consultant members. Jeff was on the SoL staff and was the Director of Partnership Development for 11 years. Rick was a member of SoL's first Board. Heidi Sparkes Guber has been associated with SoL since 2002 as a consultant member. She has been a member of the SoL Board and more recently served on the design team for Global SoL. Miriam Hawley has been a consultant member.

Standout Moments and Insights

Rick, Heidi, Jeff, and many other consultant members of SoL had the opportunity to work on a coaching contract with NSA, an organizational member of SoL. Engaging consultant members of SoL on the project was the result of the idea that three perspectives were crucial for maximizing learning and enabling high performance. This goal was in direct support of SoL's purpose: to discover (research), integrate (capacity development), and implement (practice) theories and practices of organizational learning for the interdependent development of people and their institutions. This work at NSA led to the founding of a SoL Coaching Community of Practice, which enabled the development of SoL's model of coaching, a course entitled "Leader as Coach," and coaching delivery to more than 300 managers in several SoL member organizations.

As this work continued, it provided the foundation for further work in the area of coaching, including the organization of the SoL Global Coaching Community and the development of an advanced course for professional coaches and leaders in organizations entitled "Coaching from a Systems Perspective," which now has been delivered in SoL communities in Hungary, Japan, the UK, and India.

Milestones

The initial purpose and design of SoL was certainly a milestone. The idea of becoming a membership organization that supports learning communities has been the foundation for the work stated above as well as for lasting relationships that literally span the world. Without the SoL community, the work described above would not have happened.

Second, the development of a community of practice in the area of coaching was for us a milestone. Finally, we also see the recent design of a truly global infrastructure as a pivotal point for SoL.

Leverage Points

We begin by knowing and bringing integrity to our purposes in life, work, and our communities and the larger world. In order to be effective, we must first focus on our health and well-being – the physical, emotional, mental, and spiritual aspects of our internal, family, and relational systems. We have more positive and sustainable impact on others if we lead our lives powerfully and

consciously, loving ourselves and others. We need businesses and organizational systems where we can use and develop our best selves, and do work we love that serves our purposes to make a difference.

We are active participants in community systems that appreciate that there is no business on a dead planet. To be sustainable, we must recognize that we are one with the natural world. For example, Ecuador has written the rights of trees and rivers and all of nature into its new constitution alongside those of people. And as global citizens – even if we don’t personally know one another – we are all interconnected and care for the sustainability of our brothers and sisters everywhere.

Highest Aspirations

In this increasingly interdependent and interconnected world, one of our highest aspirations as a SoL community might be to have fluid and flexible partnerships that can be tapped into as needed anywhere in the world. The deep experience, expertise, and collective learning practices that we hold as a global community could be put to use and expanded for the good of humankind, especially in places where deep systemic issues hold us back from having a world that works sustainably for everyone. We face deep, intransigent challenges of increasing population and depleting renewable resources. Somewhere in these conditions also exist the innovative and collective solutions that we might make more accessible through cultivating the “network of networks” that is emerging.



MARISOL LOPEZ
President, OCCI Global
and the Rizal Academy
for Innovation and
Leadership

Association with SoL

After attending the 2008 Pegasus Conference in Boston with four colleagues and meeting Peter Senge for the first time, upon my return home, I rounded up my network of consultants and business clients to convene SoL Philippines. My goal was to re-create the learning community experience that I had benefited from.

In early 2009, I applied for community recognition on behalf of 24 other men and women, and that recognition was approved in July. I was elected to a two-year term as the first executive director of SoL Philippines.

Filipino OD practitioners are familiar with Peter’s work, because it is one of many other OD theories taught in our management schools. With my beginner’s mind, I posed the question, “Why don’t

I see Philippine companies truly practicing the five disciplines and moving toward societal sustainability and global citizenship? Was the spirit of the learning organization lost in translation?” The more I learned about learning organizations, through reading and participating in Otto Scharmer’s Presencing in Action Lab, the greater my sense of urgency to share these important ideas with others.

Standout Moments and Insights

- **Meeting Peter in 2008 and hosting him in Manila in April 2011.** He is such a busy man, and yet every time I have the opportunity to be coached by him, I feel his genuine desire to help me succeed in the work of transforming Philippine companies and other systems into learning organizations.
- **Organizing the ELIAS Philippines Learning Journey in October 2010–2011 and learning much from Otto Scharmer.** I also participated in the first Presencing in Action Lab from 2010–2012 with two colleagues and was part of a peer coaching group with members from Indonesia, Singapore, and Australia.

- ***Bringing Camp Snowball to the Philippines*** by producing learning events for our Department of Education with Tracy Benson and Joan Yates from the Waters Foundation, and convening the Snowball Philippines learning community to promote systems thinking in the country's K–12 schools.

I consider all of these encounters and learning experiences as grace . . . and with much grace comes much responsibility.

Milestones

The first milestone for me is the constancy and commitment of the core group of members who have stayed faithful to the work. Being a new kid on the block, I immediately felt acceptance and support not only from Peter but also from Sherry Immediato, Mark Alpert, and Frank Schneider. Recently, I met Robert Hanig, one of SoL's founding members, and he also impressed me with the same spirit that characterizes other SoL members. That's "branding."

The second milestone has been the very courageous move to go global. Again, I'm impressed with the level of commitment from the core group to help

the initiative succeed. I haven't even met them yet but I feel part of the team and am willing to do my share.

The third milestone is the fact that whole system change, systemic change, and sustainability are the current buzz words, but SoL has been using them for the last two decades. The challenge for me is to develop practitioners faster without losing the spirit of the original impulse.

Leverage Points

For me, at the end of the day, it is still about leadership. We need to learn how to be collaborative leaders and transform mindsets to accept the truth that we are all part of one big system. I have been fortunate enough to be coached by Peter and Otto, and in them I see the embodiment of the message. I hope to be able to share what I learn and inspire more Filipinos by also being the message of oneness, wholeness, and sharing.

Highest Aspirations

To continue developing practitioners who live the message. I feel quite fortunate to be part of this community. I hope to create the same kind of loving community in the Philippines.



MICHAEL KILLINGSWORTH
Vice President Learning
& Organization
Effectiveness
Upstream Americas,
Shell Oil Company

Association with SoL

I first joined as a Liaison Officer (LO) in 2002, representing Shell. Shortly after being nominated as the LO, I signed up for the Foundations for Leadership course, which was led by Peter Senge. This was an excellent way to fully embed myself into SoL and to equip myself to bring the SoL experience into Shell in as many ways as possible. The foundational course, combined with my first LO meeting, was all it took to create the passion

and dedication I feel for SoL, which has only increased over the past 10 years.

Standout Moments and Insights

On a personal level, being connected with SoL over the past 10 years has enabled me to develop many long-term professional and individual relationships. Since the first meeting I attended, my network quickly grew, and that network has not only been sustainable but also continued to increase. I am proud of this network, as these are folks I feel totally comfortable calling on for professional guidance as well as connecting with as friends.

On a professional level, deepening my knowledge and skills with systems thinking has proven to be valuable to my career growth. I've been able to

apply these skills as well as transfer them to others. Something that seems so simple yet is profoundly effective is the check-in process that I've learned through SoL. Over the years, I have used it individually to prepare myself for certain interventions and with groups to ensure focus on our objectives. Many years ago, the LO group collaborated on the "SoL Applied Learning Process," which is used for pressing business needs. To this day, I carry the model with me in my computer case so I can constantly refer to it. It's more than just a model, as the LO team used the process to work through some organizational initiatives. Another project that has made a significant impact on my work is what we call "Hastily Formed Networks." So, while the Liaison Officer group is no longer connecting on a regular basis, I continue to use some of the key work we established.

Milestones

Each and every Liaison Officer meeting I joined over the years provided one more nugget of knowledge and one more opportunity to further strengthen my global network. Someone recently asked me, "As a leader, what makes you happy?" My quick response was "a cancelled meeting," given the number of meetings I am requested to attend. This was not the case with the LO meetings; I looked forward to them and acquired new knowledge, skills, and actions at each session.

In addition, there are three major events that have made a strong impact on my personal and professional development through SoL:

In September 2005, I was part of the design team that helped to build and deliver the 2nd Global Forum, held in Vienna, Austria. Under the theme "A Symphony of Innovation: Leveraging Complexity to Create Knowledge and Confidence," hundreds of practitioners from many countries gathered in this beautiful location to collaborate, share, and explore learning through business case studies, research, and various methodologies.

In February 2007, I hosted the Liaison Officer meeting at The Woodlands, Texas. This particular

gathering was more than our regular meeting, as we kicked off with a day of focus on diversity and inclusion. Various organizations demonstrated what they are doing in the D&I space as a best practice. To date, those who experienced that day are still reflecting on their learnings.

In April 2008, I again had the honor of being part of the design team for the 3rd Global Forum, held in Muscat, Oman. The theme that year was "Bridging the Gulf: Learning Across Organizations, Sectors, and Cultures." This fantastic event, held under a tent, provided us opportunities to learn from inspiring keynote speakers, practitioner roundtables, workshops, cultural excursions, and even learning "souqs" (or "marketplaces").

Leverage Points

To create healthier and more sustainable human systems, I believe it is important to maintain a holistic, diverse, positive frame of mind, which requires us to learn from all situations we are faced with and to seek the good from those experiences. We must keep a strong work-life balance and carefully determine the amount of time and energy we spend on work and the amount we allow for our friends and families. I am a strong advocate of Accelerative Learning, adult learning methodologies, and the principles of SoL, and believe these elements are required for learning to be effective and efficient in any environment.

Highest Aspirations

As I consider the future of SoL over the next few years, I would love to see the Liaison Officer network come back to life, given the powerful impact it provides organizations. Additionally, I would like to see the Global Forum become *the* desired annual event to attend. We continue to explore new avenues that we've not yet traveled using the expertise that SoL holds, so I encourage strong participation in those areas. An example is a project that we are currently considering where organizations can come together to discuss, review, and decide how we can improve our approach to safety performance.



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Saybrook University

Association with SoL

I have been associated with the Society of Organizational Learning since 1999, when I attended my first Bay Area SoL meeting. Within a year, I became a Steward of the Bay Area SoL community and continued in that role for the last 13 years, supporting programs, new member connections, and liaison to the global SoL community. In the mid-2000s, I became a researcher member of SoL.

Standout Moments and Insights

The work itself, the purpose of the work, the wonderful colleagues have all shaped who I am as a person, researcher, teacher, and consultant.

Milestones

The movement to establishing SoL as a true global community was the greatest milestone, in my opinion, in stretching the boundaries of who we are and the impact we want to create in the world. Along with this change, the conversation and structural changes to creating SoL North America and more local communities seem to be opening the door to becoming a less exclusive and more dynamic learning community.

Leverage Points

Developing the capacity for systems thinking and systemic change is critical to a sustainable future. Systems thinking needs to be seen as more than the use of the tools of system dynamics. A true systems thinker understands herself as a relational being and takes action based on that understanding. Also important is the recognition of the participatory nature of systems work and the theories and models that support it. These are all part of the conversation in the SoL community, yet they need to be made more explicit, so that people view systems thinking and being from a larger perspective.

Highest Aspirations

One of my main objectives would be increasing membership and creating a network where people can more easily connect with one another. We need to have many strong local communities and a robust virtual global community. We need to find new ways to get our message out. I think of the impact the Pachamama Alliance has had in the world. They have done this through inviting people in around a powerful message and purpose in creating change. Yet they are not strong in creating learning communities. We have the knowledge of what learning communities can be. Now we need to find a better way of developing them and supporting people who will keep them alive and relevant.



CHRISTOPH MANDL
Senior Partner, Mandl,
Luethi & Partner, and
Professor at the School
of Business, Economics,
and Statistics,
University of Vienna,
Austria

Association with SoL

I was first associated with SoL Austria in 2001, and then soon afterward I became involved with Founding SoL. I'm presently involved with Global SoL, which is quite exciting because it's still in a very early stage. Basically, there is now a legal framework that the different local or regional communities of SoL can use to create conferences or work on projects or create publications together. It's totally open at the moment, but the very fact that there's now this kind of framework

of the Global SoL Association is actually a major step forward.

Standout Moments and Insights

A profound experience was when I happened to get an early copy of *The Fifth Discipline Fieldbook*. I was in Boston for a different reason, and I went to the Harvard Coop and there were lots of *Fieldbooks* there. I knew something like that was coming out but I didn't know when. I took the book with me on a vacation in the Azores, and I remember reading a piece by Bill Isaacs on team learning and dialogue. That was a real eye opener that substantially changed my professional work. I guess that was also the reason I became interested in SoL, because for me it was the only organization at the time concerned about this kind of communication approach in teams. I'm still working with these concepts, ideas, and methods today.

One of the other experiences was when the first Global SoL conference in Finland came into being in 2003. Earlier, at a SoL meeting at the University of Nyenrode in the Netherlands, a group of us created the idea of a Global SoL conference. We brought it into the plenary, and people picked it up, and it actually materialized. I've never experienced something starting in the heads of a few and then materializing to that extreme except at SoL. It is something that I really cherished.

Milestones

The first real major milestone before SoL existed was *The Fifth Discipline* together with the *Fieldbook*. After the creation of the Organizational Learning Center at MIT and then the founding of the Society for Organizational Learning in Boston, the next major milestone was the major effort, led by Gören Carsted, to support the creation of different SoL communities around the world. That was a big step from having the Society for Organizational Learning in Boston as the only organization versus 20 or 30 different communities all over the world.

Another interesting milestone was the set of dialogue interviews that Otto Scharmer did and published on the web. I also think that the whole U-Process that Otto brought into being was another milestone.

Leverage Points

I've been very much influenced by the thinking and concept of team learning over the last 15 or 17 years. The greatest leverage point is when people at all levels – at very big levels such as the UN climate change conferences but also on very small levels in some departments and organizations – can communicate in such a way that they come to a clear understanding of the interdependencies between them and the next steps they need to take. Unless people can talk to each other and come to a consensus about what needs to be done, we won't be able to solve the challenges that we are facing. The only method or concept that I know with the potential to cope with these issues is team learning or dialogue.

The other thing is that when I'm teaching at the university, I always tell my students that the 21st century is going to be the century of the tragedy of the commons. The only construct I know of for addressing this is systems thinking. So to me, team learning and systems thinking are the core leverage points.

Highest Aspirations

The highest aspiration would be to bring those two ideas – team learning and systems thinking – into global society at large. We're 7 billion people, and maybe a couple of thousand or a couple hundred thousand people have an understanding of systems thinking and team learning/dialogue. So the biggest challenge for me is to bring these concepts into the world. And I know it takes a long time to get this kind of thinking across. My personal vision of SoL is an organization that has two core competencies – systems thinking and team learning – that we bring to the world.



CRISTINA D'ARCE **President of SoL Brazil**

Association with SoL

Some friends and I founded SoL Brazil in 2000. We shared a profound interest in the field of organizational learning. Since then, I've also been the coordinator and, more officially, president of SoL Brazil.

It was a long journey until the container could be fertile enough to grow the seeds and we were able to sustain a large, committed membership. For 12 years, we have had monthly meetings, each five-hours long. The group has focused its learning on themes of interest to all members of the SoL community: education, sustainability, cultural biology, systems thinking, the economy, business, transdisciplinary approaches to education and health, collective thinking, design thinking, and so on. We chose to be a learning space that inspires and gives support for people to create cross-sectoral networks and to act in their own working environments.

Standout Moments and Insights

One of the most important moments was our first attempt, in January 2004, to create a truly global and connected SoL spirit. A group of SoL coordinators met in Boston, with the guidance and support of Sherry Immediato, and engaged in a deep reflection on how each community could work locally while aiming to be in service of the whole by sharing knowledge, practices, tools, and stories.

Milestones

From my perspective, a first important milestone was the 2003 Forum in Finland. There we could

finally see ourselves not as isolated communities but as a much larger group of intentionally connected groups. We could feel vision and purpose create the community's life and body.

The second milestone was the 2005 Forum in Vienna. I was part of the design team and could feel our confidence grow as a group to expand horizons, create together, be daring on our goals. We really acted as team, and the event was very successful.

A third critical milestone was a meeting on the outskirts of Paris in May 2009, with representatives of SoL communities and sister communities (Presencing Institute, Sustainable Food Lab, World Café, and others). Global SoL, in its present structure, evolved from a three-year journey that started at that Paris meeting.

A fourth milestone was the meeting in Stockholm in May 2012 that led to the consolidation of the new Global SoL.

Leverage Points

I believe that the most effective leverage points are SoL's social networks, which create a collective dialogue and sustained action with whoever feels the urge and willingness to act. Every human being should feel responsible for and be involved in this kind of transformation, in the areas and concerns that he or she feels deeply drawn to. If we rely only on defined structures and particular groups to lead people toward their goals, I do not believe that we will generate the transformations we need.

Highest Aspirations

May our highest aspirations aim for and find the path and the means to be a true community.



**HEIDI SPARKES
GUBER**
**Founding Partner,
Fourth Quadrant
Partners and Systems
Perspectives LLC**

Association with SoL

I joined SoL in 2002 and very quickly got involved in a number of activities, first to discover how SoL “worked” and then to participate fully in realizing the purpose of this remarkable self-organizing entity. One of the opportunities my business partner and I created right away was facilitating the quarterly convenings of the SoL organizational members: We systematically applied and amplified SoL learning organization practices with the Liaison Officers and continued to propagate these among other emerging communities in SoL. I also joined the SoL Council of Trustees as a way to build a leadership voice for SoL Consultant members as a body and saw that function become the development field for many of the SoL Consultants who have continued to take leadership roles in SoL and elsewhere.

Standout Moments and Insights

The greatest defining moments in my affiliation with SoL have all been around the proven power of applied learning in accelerating the depth and quality of self-organization and real-time results, i.e., seeing that it works reliably and that if one truly pursues that discipline, great things can happen. I have many stories about this, but three stand out:

First, in a set of self-organized learning sessions that emerged in 2003 out of the SoL Greenhouse the previous year, we explored several organizational archetypes (in particular, “Success to the Successful”) within SoL. This exploration led to the formation of the Consulting Convergence as an experiment in convening the vast array of experience and tacit knowledge we were all holding. This group thrived as we tested various ways to share and build on what we knew.

Second, the early National Security Agency executive coaching team began to work as an intentional community of practice in order to support each other and build on what we were finding, even though the client was not requesting that level of learning and capacity building. Again, this group thrived and propagated other tools, methods, and applications for that client and others that continue to evolve today and that have contributed to the emergence of, among other new communities, the SoL Global Coaching Network.

Third, during the famous blizzard of 2005, which stopped many of us from meeting together in Boston, we conducted a virtual Emergent Learning Map through synchronized large- and small-group conference calls throughout the day. That exercise revealed many valuable collective insights and hypotheses about how to expand our impact that have since become the foundation for vital work for many of us.

Milestones

Marblehead I in October 2001 and Marblehead II in April 2005 in which the funding sponsors of the global Sol network met to provide their perspective on the continued development of our community. In these conversations, the participants identified a set of trans-organizational issues – and core questions – of great importance to our firms and to society. This was a milestone for us in that it affirmed that we were not about anything we *did*, but rather about the pursuit of core social issues and questions that would make our work together relevant and powerful in the world.

The development of the SoL Project Guidelines, which freed up those of us who wanted to do work together and in SoL organizations. These guidelines put principles in place to address the concerns of how to take this work into the world in a way that honored our affiliation with SoL. This was a milestone for me, because it allowed us to self-organize and work together freely, rather than

sit around wondering how to do it. And it seemed to effectively address a number of the old issues that had plagued us up until then.

The development of the Capacity Lab, which gave us ways to share what we know and practice while acknowledging the sources of our learning and making clear to others how to access, use, and share our work. This was a milestone for me because, up until that time, sharing was restricted for numerous reasons that these Capacity Lab principles addressed.

The dissolution of the Council of Founding SoL in 2009-2010 and the subsequent emergence of the Global Association of SoL Communities in 2012. This was a milestone because it was a clear step – not a bunch of rhetoric – in the acknowledgment that SoL is a global entity and not the property of “SoL Boston” (aka Founding SoL). Participants engaged in this process without knowing what would happen, and over several years, the new form of SoL began to emerge. There is much work still to do, but the ownership of SoL has indeed been passed on to its members. Three milestones within that event were the original SoL Group of 25 design meeting in Paris in May 2009, in which the seeds for Global SoL were planted; the first Global SoL Charter Members meeting in Amsterdam in November 2011; and the first Global SoL General Assembly in Stockholm in

June 2012, where our charter SoL Community representatives actually showed up for our first Global SoL General Assembly. These events and participants are a living demonstration of the remarkable SoL purpose and principles that have continued to emerge.

Leverage Points

First, we need to focus on critical conditions that must be transformed for the good of humankind; then we need to find those who are already doing good work and network them to build capacity for a critical mass of citizens. SoL can do this by making visible and relevant the network of networks that is already proliferating by calling out specific high-leverage endeavors upon which to focus our partnerships and resources, and by providing convening opportunities that bring together diverse stakeholders.

Highest Aspirations

A world in which intractable problems become immediate triggers for effective collective innovation . . . that this is a shared capability by young and old, all nations, all socioeconomic levels, all cultures . . . that as a result, people, organizations, communities, and nations are confident, grateful, and happy . . . and can only barely remember those times when this was not the case.

NOTE: *Since writing this response, I have been elected Board Chair of the Global Association of SoL Communities. In fact, four others in this section – Ágota, Irène, Christoph, Marisol – are now also active Global SoL Board members. The existence of this vital community certainly marks a step forward and honors all who have brought us to this new emergence!*

Reflections

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