

FROM LEARNING ORGANISATION TO SUSTAINABLE DEVELOPMENT *ECLO Annual Conference – Glasgow 2007*

Sustainable development can be expressed in terms of economic, environmental and social progress. Prominence of the subject across the world today has reached spectacular proportions. Conditions for nurturing an environment that will allow 'sustainable development' to flourish are absolutely central to the role of what used to be called a learning organisation specialist and is now more aptly titled Change Leader for Sustainable Development. The research and development experience of the last twenty years on the value of frameworks, competencies and tools for the learning organisation has positioned the Change Leader as a key player in what is now referred to as 'sustainable development'.

Sustainable development definition

Sustainable development is a dynamic and flexible process for:

- Compelling needs to be satisfied and visions to be realised ...
- Leaders nurturing spirit and environment for engaging all people ...
- Discovering and applying new ways, means and equipment and materials ...
- Inspiring continuous growth in values, skills, products and services for ...
- Increasing volume, superb quality or both for less cost of local resources ...
- Sharing to help others in satisfying needs and creating new visions
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The above definition demonstrates that the condition of 'sustainable development' may only be achieved through professional rigour, application and competence. A full list of 60 competencies is included in a recently produced 'Change Leadership Portfolio'. The first iteration of these competencies was used by Liverpool Business School, UK in 1996 as the basis for candidate entry on to a Masters Degree in 'Total Quality Leadership' that was jointly designed by the University and the Rover Group Ltd. The definitions should also demonstrate that sustainable development is much wider than environmental considerations and also that 'people' are amongst the most important features for any organisation or body on the trail of creating conditions to spawn a culture of sustainable development.

Sustainable development frameworks

A framework is a device for turning a vision into reality. The features of a framework encompass best practice activities that are underpinned by proven theory that is applied using best practice tools and techniques. An alternative name for a framework could be a model, a template or a structured guide. For the definition of sustainable development to be applied into turning specific visions into tomorrow's reality, a framework is need is plan and harness all the discrete contributions required for compelling needs to be satisfied and vision to become reality.

Frameworks for sustainable development have been researched, developed, applied and evaluated over the last 15 years by the author. Three examples of external recognition for frameworks are applications that gained recognition by the World Initiative for Lifelong Learning that awarded the Rover Group the title of World Best Learning Company; the European Foundation for Quality Management's prize for industry/academic collaboration and the International Federation for Training and Development Organizations adoption of a framework as the basis for promoting sustainable development. The environments where these activities have taken place include the automotive sector; a local community; a geographical region; small and medium-sized commercial enterprises; universities; voluntary organisations; a trade association; academic networks; a city council; manufacturing organisations; and the

United Nations. For frameworks to be effective and owned by the organisation using the framework, by far the most productive method is to enable the leadership of the organisation to create and develop an internally generated framework. Such a process is likely to be designed and facilitated by a professional specialist who is skilled at diagnosing and designing learning processes and also formulating and asking the right questions.

Sustainable development framework features

The features of a sustainable development framework can be related to the features of an orchestra or a sporting team like cricket, soccer or rugby. People occupying various positions in the team have a different role to play but, hopefully, have all bought into the collective vision for the team. The quality of the contribution from each position or player relates directly on how well they have been prepared to play their part. The following features are main features of a sustainable development framework and are explored in the next section of this paper. They have been arrived at by studying projects that have been both sustainable and unsustainable. Published examples of specific studies are included in 'Developing Organisation Change Capability' by Oxtoby, McGuinness and Morgan (1); 'Model for Change and Learning' by Guastavi and Oxtoby (2); 'Open Learning in the Mainstream' – edited by Thorpe and Grugeon (3). If the framework features are present and working, the prospects for sustainability are enhanced. If the features are missing, or working ineffectively, the prospects for sustainability are reduced.

An authoritative reference for asking questions related to framework features can be found in 'Leading with Questions' (4). The right questions are a powerful mechanism for unlocking ideas that can be owned and answers being shared and delivered. In Michael Marquardt's book, the practitioner is provided with very useful help in formulating powerful questions for realising visions and changing cultures to do so. The impact on sustainable development that the framework will enjoy can be related directly to the capability and competence of the user. To quality assure the user, or a team of users, a learning process that can be accredited at certificate, diploma and masters levels by a UK University has been developed and applied. The learning process includes a set of 60 competencies and a three-tier assessment process.

Stages of the framework

A summary exploration of framework stages now follows and in four distinct phases. The phases have been reduced from twelve to five in this summary for ease of introduction.

1. Compelling need and clear vision

The motivational driver for the subject in need of attention must be accurately and objectively identified. The need must be of compelling proportions in the minds of all involved at every stage, otherwise it is likely to be set to one side when difficult times are faced and progress be arrested and become unsustainable. The need can arise from something that has gone disastrously wrong in the past or be the brilliant idea for an outstanding opportunity to occupy a leadership position or a competitive stance in the future. Needs that exist in a vacuum, unconnected to a shared vision, are vulnerable and also needs that are personal and not shared are doomed to failure. Needs should be translated into a vision of the future on what achievements will look like when the compelling need have been satisfied.

Probably the best known and most oft quoted vision is that of John Kennedy when he said in 1962 that the vision for NASA is 'To place a man on the moon by the end of the decade and be returned safely to earth'. When Kennedy articulated that vision, only 25% of the technology needed for transportation to the moon had been

invented. In the sporting world, the England rugby team vision 'to win the world cup in Australia in 2003' was articulated by Clive Woodward six years before the achievement was realised. Both Kennedy and Woodward were leaders who created a shared vision for all involved that inspired the sought-after achievements. For needs to be shared by all people involved who are forward looking in the same direction, a vision of the future needs to be created and owned by everyone. Vision creates focus, identifies direction, unleashes power and allows for freedom of movement. The hallmarks of a compelling and inspirational vision are 'a dynamic storyline, impressionistically complete, laden with meaning and memorable' -The Tools of Leadership by Max Landsberg (5) 'A vision is a picture of the possible and focuses on the end result' – The Leader Within, Zigami et al (6) In addition to 'Leading with Questions' (4) – by Michael Marquardt, a source of reference mentioned earlier 'Discipling, Coaching, Mentoring' (7) by Bryn Hughes identifies great questions to ask when formulating a vision.

2. A Culture for Development

If 'the way we do things around here' are both articulated as a set of values and practised by all involved in change that needs to be sustainable, then a basis exists for moving forward. The culture of any organisation has been researched as being more influential in helping people to learn new attitudes and behaviours at work than the content of the change or the methods applied. 'Frameworks for Effective Work-Related Learning' by Caley and Hendry (8) Diagnosing existing culture, using tried and tested tools and techniques, is an essential activity before objective judgements may be made on whether existing culture is conducive to sustainable development. If it is, then new ideas have a better chance of taking root. If it isn't, then work needs to be done to nurture a culture for development after first identifying the main characteristics needed.

Momentum for change is critical for change to be sustainable and will be largely governed by the culture of the organisation. Leaders assert the greatest single influence in helping others to implement sustainable change when they role model the desired culture and values of the organisation. Leaders make a telling contribution to sustainable change when they use a combination of communication methods and techniques, based on organisational values, in a way that will influence other leaders and colleagues. In agriculture, the quality of the soil often determines the richness of the harvest. A new word is offered for the process of preparing an inspirational environment for people to grow in the 'head, hand and heart'! The word is 'communiculture' – not to be found currently in any dictionary! To create an environment of 'transparency, openness and trust', it is imperative that communications and learning are inherent features within the culture being nurtured. It is a dangerous assumption to believe that everyone involved in change and sustainable development is competent at learning and new ways of operating. Ten tips on 'Learning how to learn' are featured in the book '500 Tips for Developing a Learning Organisation' by Day, Peters and Race (9) and are a useful stimulant to helping those switched off by change to be switched on and become enthusiastic. If every change was seen as an exciting learning opportunity by everyone affected, then the culture for sustainable development will have arrived.

The selection and orchestration of communication and learning methods by the leader is a key process in determining culture and also for taking advantage of existing culture. A set of criteria for selecting effective learning and communication methods, based on original work by Bass & Vaughan, has been developed. The criteria cover - learner participation in design; motivation of learners; support from line manager; transferring learning to work; measuring results; learning reinforcement; and time for reflection. Peter Honey and Alan Mumford have drawn expert attention to the importance of learning styles of activists, reflectors, theorists and pragmatists in 'Using Your Learning Styles' (10). Sylvia Downs has focused

vividly in 'Learning at Work' (11) on the advantages to be gained when applying her set of criteria for designing and reviewing materials for learning. Sylvia's criteria includes linkage to end user, learner population, matching to objectives, logic, factual and conceptual materials, opportunities for practice and feedback, measures of success.

3. Measurement, Review and Recognition

So many people have been heard to say 'what gets measured gets done'. The importance of measuring progress toward an environment for sustainable development is undeniable if further decisions are to be made and actions are to be chosen to improve prospects. Developing initial criteria for profiling and environment of sustainable development is only a first step. However, the quality, precision and objectivity of the criteria are critical. Robert Mager's work in this respect is more than helpful. In his book 'Preparing Instructional Objectives' (12), he lays out the importance of 'performance, conditions and standards' of any criteria or objective that needs to be in place before it can be considered as an objective.

Setting the criteria, by specifying with the utmost precision, needs to be supported by a practical measuring process. The process also needs to be applied with a set of tools and instruments that help to gather data. Too often, the objectivity can be removed from the process through a scarcity of tools and people available and capable of taking measurements. Additional words of caution are not to make the criteria to be measured to be too sophisticated and clever. The simpler they are, the more likely that people will understand and use them. 'Linking Learning and Performance' (13) by Toni K Hodges is a very practical guide to measuring learning and on-the-job-application.

4. Review

An effective process for sustainable development is equally applicable to the process of review as it is to planning. Each feature of the process is part of the total jigsaw or may be regarded as a '12-ball juggling act'. Reviewing progress, capturing the learning and leaving a legacy are all part of the reviewing process.

Right from the word 'go' on any project, a review should primarily gauge the progress towards an inspirational vision and challenging objectives. A review by the key people involved is a time for taking stock, assessing benefits accumulated and also opportunities missed. A key part of the reviewing process is the visible display and communication of results in a user-friendly style with time built-in for reactions. Who and how people react is important information, especially if their preferred behavioural learning style is known. Activists and pragmatists are likely to react in a very short time if they are going to react at all. Alternatively, theorists and reflectors will need more time to think through information they receive from any source. Do not expect an immediate response as they are likely to feel uncomfortable if pressed for one.

5. Recognition

For improvements to be sustainable, people involved are more likely to remain motivated if a genuine form of recognition for their efforts is built into the process. "People like to be praised and celebrated" claim Day, Peters and Race in their 500 Tips book (9). Arguably, the most powerful form of recognition to a team or individual is an invitation to share learning from a project or work with others who are equally interested in the subject.

Unpacking and analysing what is meant by this statement is very revealing. Forms of recognition suggest that a whole variety of methods are available. Obviously this is true as we are all of different character and disposition. There will be motivational methods deployed in an organisation that will inspire some and depress others. It is a skilled process to identify accurately what turns people on to greater effort. To

discover and gain approval from people on how they wish to be recognised for what they do should be a permanent feature of all environments.

Both teams and individuals should be recognised for their contributions to work that needs to be sustainable. Less controversial is likely to be the individual in this context as the process is less complicated and been around for centuries in one form or another.

Outside the world of sport, recognition for teams is more complicated due to the organic nature of team composition and development. The university system of awards has focussed very largely on individuals at degree, masters and doctorate levels. Given that in most professions and walks of life, people are also part of project teams and departments, is it beyond the imagination to devise a process to award team degrees?

I can not think of a more motivational action by a leader than to invite an individual or a team to share their learning with others also selected by the leader to learn from that individual or team. Without such an invitation, individuals or teams would be more likely to suppress their learning by keeping it in the dark by not having the opportunity to reinforce and build through sharing. By sharing learning under conditions created by the leader, individuals will be throwing light on their learning process, exposing good practices and also inviting others to challenge and question so that they too may emulate and surpass what has already been achieved.

When considering appropriate forms of recognition to strengthen the prospects of sustainable development, a careful balance needs to be struck between what could be motivating and what could be regarded as patronising. Examples of the forms available where this balance is important are: internal and external; too often and too infrequent; whom from and who not from; formality and informality; the right and wrong location; a permanent or passing symbol of achievement.

All forms of recognition should be causes for celebration that is appropriate to the audience. Each context takes a different form or shape. The passing of a cup of wine amongst people to share and drink from the same cup whether the cup be a trophy at a sporting occasion or a chalice in a communion service is a hugely significant act be all who participate. History has a lot to teach us and we have a lot to learn from such powerful forms of celebration in our quest for sustainable development.

It is up to us!

So far, in this chapter, the commentary has focussed upon what needs to be done to create the conditions for sustainable development. The remainder will concentrate on how to do it. Nothing gets done without people applying their motivation, skills and knowledge to the job in hand – whatever it may be. That is an absolute truth when considering sustainable development. The framework for sustainable development and its inherent features, as described earlier, need to be applied by people with competencies and a toolkit that is required for effective results to be achieved.

Where are the competencies?

I first scanned the 'market place' about 15 years ago for a set of competencies that were required for 'change to stick' and also be subject to continuous improvement. We did not call it 'sustainable development' in those days but that is exactly what we meant. A natural place to look was within the National Vocational Qualifications library at such items as NVQ's and also in the professional bodies with an interest in leadership and management. Comparing what the qualifications and competencies lists included with what I was doing at the time left a yawning gap which to the best of my knowledge has never been closed. Therefore, if I believed in what I was doing, then I owed it to myself to articulate a set of competencies for sustainable development and test my capability on each of them. It took me at least six months, on and off, to bring out a first draft. It was sheer agony and I gave myself a very hard time doing it. However, the first time I reviewed what I had created gave me some

satisfaction in a similar way to an explorer discovering something they thought was there and now they have actually seen it.

Sustainable Development Competencies

The first iteration of the competencies realised about 70 statements. Each competency was written with a performance action and a standard of achievement included within the text. The conditions under which they would be achieved related directly to the normal workplace of the person wishing to demonstrate their competence. Each competence would be assessed using two criteria. The first was the relevance to the job of the person being assessed and the second was the current capability of the person being assessed against the action and standard expressed within the competence.

Testing

The next step was to use the set of competencies for assessment and planning purposes. The first person to be assessed against the competencies was me. That was a very salutary task because I knew what I was good at but also where I needed to learn and improve. After completing the assessment and analysing information that the process had yielded, I was confident enough to invite the team I led at the time to assess themselves individually against each of the competencies. The six people in the team all completed the task and rated the importance and capability as was required. One item of crucial feedback that I received was the vocabulary I had used to describe the competencies to be achieved. There were simply some words that an individual did not comprehend and that has proved to be the case in almost all circumstances. This was even more likely to happen if they had limited experience of knowing about and applying the competence.

Further testing

A further stage of commissioning the competencies was to use them with my customers who, at the time, were 16 line managers in environments that included new products, new materials, new technology, limited cash and massive quality demands. Sustainable change was what they actually were striving for – 24 hours a day! Again, all of them completed the self-assessment without too many problems and all offered comments on the effectiveness of the process.

The final step of commissioning the sustainable development competencies was to attempt to benchmark them against what was available or being used in other award-winning organisations. The European Foundation for Quality Management (EFQM) winners were approached as were the leaders of such processes in a network of 'change leaders' from companies with a national reputation for bringing about change.

Feedback

The feedback from all sources was positive. A lot of people found the competencies to be practical and revealing in identifying expertise and skills. The only adverse comment ever received related to the vocabulary. Different cultures use alternative words to describe the same action or person. Also, when a person had limited experience of a competency, they were usually less familiar with what the competency was designed to achieve and, therefore, less familiar with the words. The words never got in the way of people who were already competent.

A Brave New World

With the learning and experience of testing and applying the competencies within a framework for bringing about sustainable change and growth, a whole new world of opportunities presented itself. Some significant aspects of these opportunities included:

- partnering a university business school for quality assuring the competencies
- successful entry for European best-practice recognition for business/university collaboration
- United Nations Secretary General's invitation on a special mission to Afghanistan
- Illustrating each of the competencies for ease of international translation
- Creating a template for sustainable change for an international federation

Sustainable development values

Underpinning all of the process for sustainable development is a set of 10 values. The values relate to learning; spirit; vision; people; culture; speed, recognition; growth; process; and forever! Whatever actions are taken, they are tested against the values before being implemented. In that way, the consistency of application across different sectors and customers is likely to be maintained.

Partner competencies

The potential for franchising the process with centres of excellence on sustainable development is huge. A first step towards franchising will always be to invite the staff involved with the partner to self-assess their capabilities against the competencies and share their assessment with line managers for verification. The journey to establishing international partnerships is 'fraught with opportunity'. Current efforts to establish a base in the UK are making good progress.

The assessment process

At the heart of sustainable development is the assessment process that is integrated into the work programmes of all who aspire to be change leaders. The three levels are self-assessment; assessment by 'boss'; assessment by external assessor. The assessments are supported by a portfolio of supporting materials, created by the participant, that demonstrate how the competencies have been achieved. Over thirty-six types of evidence are admissible in the portfolio. No individual should need to create anything materially new that has not been used within the organisation previously. Experience has shown that each participant that creates their own portfolio appears to value the 'package' as a huge point of reference for the rest of their career.

Project-based

Transferring learning to work has always been a difficult challenge for students in any discipline. Expectations of application are often shattered through poor planning, weak leadership and obsession with the 'here and now'. For sustainable development projects to stand any chance of being implemented, it is a condition of entry onto the process that projects are identified, selected and introduced at the very beginning. No project – no entry!

The importance of involving the boss of the project leader and also the customer/client that will benefit from a successful outcome can not be over-estimated. Opportunities will exist for both boss and customer to be integrated into the assessment process and the effect on sustainability where this happens is dramatically positive.

Toolkits

Best practice tools, in the hands of competent users are another key to sustainable development. Practitioners accumulate tools throughout their career and there are some tools that have become standards across the world for specific applications. For sustainable use of tools by the customer, I have invariably found that to create a new tool with the customer for a specific application is by far the most effective way

of ownership by the customer and therefore accelerates the prospects of sustainable applications.

Conclusions

By definition, sustainable development is never going to be easy. The size of the challenge in economic, environmental and social progress terms is daunting and also incredibly exciting. Practitioners, like us, need big picture frameworks that are decorated with features in the same way as a monarch's crown is decorated with precious stones and jewels. However, our frameworks can not be left to reside in secure places and only brought out on state occasions. They are needed each day and every day where change is being implemented and sustainable development is not only necessary but mandatory. It is up to us to develop and apply competencies with rigour and efficiency and winning constant feedback from our customers and clients.

It is a brave new world we are facing in a brave new century of the planet earth. Our personal values are of paramount importance, the quality of partnerships forged need to be lifelong and sustainable, recognition and celebration for what is achieved needs to be consistent and dignified.

Barrie Oxtoby – 25th May 2007

References

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