

Response to CLASS Discussion Board (1 February 2015) Week 1 Activity

Thread 1 – Using an Organization and Community to Learn

Pete Helseth posted a sample response. If you have a small town and there are not many changes in the external context, it may not be necessary to create a “composite” community to support your case in this class. When you read the context information that I posted on the site, you will see that the more complex the external environment and the more it changes, greater emphasis needs to be placed on watching (this is called “sense making”) the external context closely since changes can influence the level of uncertainty and this can jeopardize the organization’s ability to meet its objectives.

Political v Legal – You were advised to download a free e-book on PESTLE. On page 12, it has a graphic that describes the political factors. To me, it looks like the political is focused on the local government. “It is always advisable to keep abreast of potential policy changes in any government because even where the political situation is relatively stable, there may be changes in policy at the highest level and these can have serious implications.”

On page 18, the guide states, “The list of legal factors that should be considered includes current and impending legislation that might affect the industry (your organization) in area such as employment, competition and health and safety. “

I would read this as follows: in the political area the factors are directly attributable to those politically elected or appointed officials. In the legal area, the organization is directly effected as a result of the legislation, rules and regulations. Perhaps the political situation will create uncertainty for the organization and the legal situation will more directly affect the operations of the organization. In the latter case, Sarbanes-Oxley and the WEEE Directive are provided as having a **direct** effect on the organization. In the political area, “political factors include government attitudes to employment, consumer protection, the environment, taxation, trade restrictions, and societal reforms, as well as the burden of bureaucracy and the level of corruption. In the political area, organizations belong to other organizations that watch these impacts; e.g. chamber of commerce. This group represents they voice and provides them with the opportunity to influence policy with a larger number of organizations and people. I think the difference is in perspective only. HOWEVER, the PESTLE is only a guide to help you find the FACTORS. So it really doesn’t matter where you place the *factors* as long as they are addressed. The P E S T L E works in a way to cover a broad range of topics that have been determined over the years to provide a good idea of the external context. I wouldn’t try to get to deep in this area. It is only a tool to have you look across a range of different areas to understand where there may be factors that can lead to opportunities and weaknesses for the organization.

The **Economic** has issues associated to inflation rate, taxes, interest rates, exchange rates, tracing regulations and excise duties. These are all financial tools.

It looks like Donny grasped the concept as I did above. I believe that I had suggested conducting an Internet search with a browser to find other documents that listed potential factors, especially

those that might be similar to what you think might affect your organization in the community that you selected. It would help to look at this at a higher level and not get too detailed.

Pete Helseth makes a good comment that supports what I said above.

Julian makes an excellent observation that supports the reason we are using the action learning method rather than telling you how everything should work!

Nice follow up comment from Jason and Nadia! Thank you!

Vivianne makes a good observation. How do you know whether you went “deep” enough? You cannot know when you first perform the PESTLE. It is essential that the external stakeholders become engaged with the organization. Their level of interest in the organization will determine just how deep to go. We will be addressing that in the stakeholder week. One problem in developing the structural basis of the organization in its community is that we all tend to get a bit ahead of ourselves. So staying at a high level at first is very helpful. The internal and external context will be refined with what we will discover over the next several weeks! This is part of the “reflection” in the action learning approach. Reflection is a never ending activity. It is used to help make the process better over time and to improve the organizations ability to meet its objectives within the community.

Astrid makes a good point. Sustainability is an established means of helping an organization in understanding the external context and how to accommodate that context. Where sustainability often fails is that it does not really understand the internal context (especially the processes and SWIFT process). Instead of trying to marry the internal with the external, sustainability chooses to have a separate initiative-driven process where extra activity (e.g. green teams) is created to address the interest of the stakeholders. This is done rather than working with the internal stakeholders to see if what they are doing already is sufficient. The method we are looking at in this course is based on the FOUNDATION chapter and seeks to make the organization work better rather than create isolated groups that handle certain relational aspects for the organization. I hope this will become abundantly clear in the weeks ahead. This is not to say that what is being done now is “wrong!” To the contrary, we are saying that sustainability and the other foundation chapter subjects are a “work in progress.” This is why most people refer to sustainability as a “journey.” Cheryl picks up on this message.

John points out the need for sustainability to help the organization establish a “responsible” objective. The cruise industry is very competitive and has gone through a lot of restructuring. These publicly traded companies need to make money to attract the investment they need to maintain their expensive assets – the ships. If an island created a new regulation, the cruise industry could punish them by not docking there anymore. However, if there was a good deal of engagement between the stakeholders and the cruise company, this could have been avoided. The cruise company needed to do a better job with its sense making and the stakeholders needed to make their “interests” known without reacting with the restrictive regulation. There is an old saying – “It takes two to tango!” We will learn more about how this is done.

Lina points out that action learning is a new way of looking at things. You have to trust that it will lead you to where you need to be and that the use of the organization and the community as your “avatar” will help you develop the skills to use all of information.

Lura helps us understand that a “parent” organization comes to our community-based organization through the internal context. This is why you have the organizational profile in week 2. The parent is NOT in the same community as its many “organizations.” If the parent has a top-down approach (they all do), then they need to learn that they cannot get adequate feedback from the units unless some “bottom-up” is in place. Now that people are beginning to use what we will call, “risk-based thinking,” it will be possible to have more of a dialogue through the understanding of the different *contexts* involved. That dialogue will help the parent organization become stronger by better understanding and adapting to constraints faced by the different internal and external contexts of its many organizations. The understanding will become better during an action learning process. Yes, companies often use action learning for this reason. Lura – trust the process...smiles... It works in real life as it works in this course.

Nadia makes a good observation with her organization. It looks like the organization was doing what you are starting to do. They may have done this informally but they learned what worked and what didn’t work. Sometimes an on-line presence becomes distracting and we do not take the time to work through the process.

Amy points out something where I have tried to provide caution. Keep the organization and community simple. You have some backup information with other similar organizations and communities ONLY if you feel that you need to use them for a particular exercise. Don’t go too deep now. As your skill level increases, you will be able to go “deeper.” However, this is not usually necessary. When you engage with stakeholders, you need to understand your organization and what you think they are going to say. The stakeholders know about their feelings and how to state them, but they don’t really understand your organization!!! Engagement is best when there is fact-to-face dialogue over a period of time. This way the parties can begin to trust each other and make their points even with some compromise. This is when the organization receives what we will refer to as its “social license to operate.” It takes time, patience and SKILL.

Vanessa is finding out how complex a simple organization can be. The public high school is part of the community school department. The Superintendent of schools is appointed in many cases by an elected school committee (POLITICAL). This is influenced by other elected officials that operate the infrastructure of the schools. You need to understand these complexities to determine how to influence things if you are going to have a sustainability program that is not a completely separate silo with its OWN objectives and initiatives. It is interesting to look at the sustainability program in the Cambridge Massachusetts system. It has a great website, but it looks like it is initiative-driven. The journey begins and we will use other tools that will help Vanessa navigate her organization more effectively moving forward. She does have the Parent-Teachers Organization as a strong stakeholder. She will have to understand their interests in the weeks to come.

Eliza has found that each facility has different contexts. The corporation may be large and looks more to its “brand” image or that it is treated as others in its industrial sector on a regional, national or global scale. That is its context. But it needs to provide the facilities with the ability to address their own contexts so that it doesn’t set them up to fail. The facilities can help the parent meet its objectives IF the all meet their objectives. I guess this is what biologists call “symbiosis.” It does help.

Loyd – there are *no lectures* in an action learning program. This is a different way to learn. However, we did handicap you (and all of the class) by having snow storms cancel the two most important classes. But in hindsight, maybe this was a great thing. Maybe it shows the real power of the method. I have not reviewed the discussion on the cohort group areas, but what is presented here is terrific. Different people will accept the aspects of action learning at their own rate. Some pick it up right away and some take a few weeks. I am much like Loyd. I usually want to know that I am doing what will lead to a good conclusion. However, we are all now living in a world that is getting more and more uncertain every day. Such certainty is probably not possible. As I learned more about risk management, I have learned to trust a process like this. Let’s keep to the action learning steps as presented in the guides to the course to see if we can all learn how to develop skills to make good things happen. I learn more every time that I teach this course. As traumatic as missing the first few classes have been, some are beginning to see the process. It will be better as we look around each bend in the road ahead.

We end with Beatriz’s comment: “I’m not 100% comfortable that I have done it correctly.” Having been through this for years (and sharing Beatriz’s concerns), it is never possible to be 100% confident! We will be learning about plan-do-check-act (PDCA) as is mentioned in the foundation chapter. PDCA makes us aware for the need for continual improvement – all of the time. If we could be 100% confident about the internal context, and there was a major change (beyond our control) in the external context – what we knew would work is totally “undone” and in hindsight – it did not work. You see from the foundation chapter that we need sense making to be vigilant. WE need to develop knowledge from our experience in the organization. Finally, we need to improve decision making so that we can deal with the positive and negative effects of uncertainty to enable our organization to meet its objectives. All of the disciplines in the foundation chapter work together for a common purpose. We have to learn how to harness them so that our organizations can succeed within their external context.

Thread 2. Most Important Lessons Learned in Week 1

This class is definitely different than any other HES course! It may be different than anything else that you have experienced. Yet, the action learning method has been around for a long time and is widely recognized for its ability to facilitate the development of skills. The tools available in the “isites” platform will need to be “mastered” to facilitate your ability to communicate well with your cohort group members. These tools are not perfect, but they have served us well in the past few years.

We have all been challenged at the start of the course, including me!! Lisa has been “reflecting” on her efforts. This is terrific! I can say that it is important to select the organization first and

then look at its immediate surroundings – neighborhood. We will only go as far as the community. If my organization was in New York City, it would be in a neighborhood. The city has Boroughs. My company has an office in Manhattan, one of the boroughs. However, it is a big area. So I might select the district of Soho on the West Side. My company is in a neighborhood in Soho (which is part of a hierarchy – Manhattan and New York City. Most of the interactions will be in the neighborhood and Soho. However there will be some influences that come from a higher level. Stick to the immediate first. Use the same model in DC. Go to the higher levels in a hierarchy when an interaction becomes evident to the organization or is referenced by a stakeholder that is engaged in conversations with the organization. Keep it simple! Even if you know everything about the external operating environment – it changes! It is a process of learning, sense making, knowledge management, decision making, and measurement. It is a journey! That is precisely why you need SKILL. Knowledge is never sufficient without the skill to use it wisely. Thank you, Lisa, for your comment about the unfortunate circumstances of missing the first classes. However, I can tell you that even if we did have that class, many would still struggle. Everyone will develop these skills at their own rate. But in the past, everyone who wanted to develop the skills was able to do so.

Alla is correct in that she does need to look at a broader spectrum of factors and decide if they apply. But the focus is NOT on the factors, but on the opportunities and threats associated with each factor. One leads to the other. Risk assessment will be used on the opportunities and threats, not the factors. It's a multiple step process. We cannot skip to the end, because we will miss the connections in between. I will be using examples from now on and I will comment on the comments as I am doing now. Thank you for the advice. I hope that everyone will find this helpful.

Julian correctly notes that it is very difficult to fall behind in an action learning process. You will not receive advice and comments for you to reflect on if you are not posting on time. If you need to be away, let your TA know and then work with the TA to get caught back up when you return. As the cohort teams start working together, it should be good for all.

Rachel makes a wonderful point of trying to post earlier to get comments on your work. There are times where this is just not possible. However, if you can schedule it into your very busy schedule, you will find that YOUR rewards are great.

In Elayne's comments, if San Diageo was selected, you would start with a neighborhood and then a district of the city. The city varies from district to district as pointed out with the New York City example above. Now to the issue of posting! I had asked for each of you to post in each of the threads for the first couple of weeks. I wanted the post to be a short summary of what you did or the difficulties that you experienced. Then I wanted the cohort to be the place where you have your initial discussions. The TA cannot help you here. You need to figure it out for yourself WITH the HELP of your cohort members. When you post on the CLASS SUNDAY discussion board, I will respond to them as I am doing now. I am going to take a look at the Week 2 postings directly to see if there is any problem in how I am wording the threads and see if I can improve the process in my Week 2 version of what you are reading now. This is my

opportunity to do better. You see I am a real believer in the power of the action learning method!! You should read the instructions in the cohort threads and decide where to post.

Each original post is made by clicking on my post. That puts it at the same level as all original posts. IF you wish to make a comment on someone else's post you click on their post NOT my post or your post. This creates a sub-thread under that persons post. You will see this improving after a week or so. The threads are easy to follow when everyone picks up the technique.

I believe that APA is included in one of the guides. However, I would refer you to a reference on the internet: <https://owl.english.purdue.edu/owl/resource/560/01/> It is a great reference on APA style. Remember that you have an in-text citation. (Pojasek, 2015). The reference citation would be: Pojasek, R.B. (2015). *Foundation for Sustainability*. Retrieved February 6, 2015 from Strategies for Sustainability Management http://isites.harvard.edu/icb/icb.do?keyword=k107383&pageid=icb.page724015&pageContentId=icb.pagecontent1594080&view=message&viewParam_message_id=1107159#a_icb_pagecontent1594080

Elayne we will get to the leadership in a couple of next week. Of course, there are many different ways to look at the responsibility of leaders. They all need to be "tailored" to the organization. They cannot really be generalized as we will learn. The PDCA is referred to in many different ways. So what you propose could work in many contexts. The PDCA is a general format that many use to start.

Astrid understands that there is a big gap between knowing and knowing how to use something. What you need to AVIOD on the discussion board is having anyone give an OPINION. We are looking at have you talk about your experience within this class, not what you think. This is how you will develop skills. You have to get informed and then try it out. You need to be prepared to fail or to be disappointed. However, you can also be pleasantly surprised when something works better than you though it might work. Sharing experiences is different than professing an opinion. Such an opinion may not be helpful (or worse it may be distraction) to someone who is trying to learn. You always need to support opinions with supporting references. It is safer to take about experience, both positive and negative and to reflect on this experience as the means for developing skills. Remember that we are only using an organization to practice with. The organization is not virtual or imaginary. It is real (without its identity) and is a composite with other organizations that we find on line. Interviewing is not allowed unless it is your own organization. You can get a lot of information on similar organizations and use it to fill in what you do not know about the organization that you selected. When I worked as a consultant, I would always study the organization that I was about to visit on line. I would then look at other organizations and I would look at the external operating environment. I could ask better questions when I was there and I had the people's interest because they knew that I had worked hard to understand the basics so they could focus on the specifics of the assignment instead of having to spend their valuable time bringing me up to speed.

Cheryl, you are correct! The factors can apply to any organization. However, the opportunities and threats will be much more specific to your organization. It is a two-step process. Figure out the factors and then use the SWOT to determine the opportunities and threats as they pertain to

the organization of your choice. As you will see in Nadia's post right after your posting, you should understand the internal context before conducting the SWOT on the PESTLE (external context). This provides the difference that you are seeking. This is why we are practicing with an organization and community. All these things become obvious.

Melissa makes a good point about reading the postings. If all of the postings stuck to the question, they would be taking the perspective of an organization and how its external operating environment affects its ability to meet its objectives in an uncertain world. You have to watch out for opinions that are not supported and not focused on this perspective. Maintaining the perspective on practicing on your organization and its community provides the focus that will make the discussion fruitful for all. Questions can be asked the discussion and/or the CLASS discussion board on Sunday. If you do not focus on practicing a specific method with specific material on your organization and the community, you will have a tendency to overthink the work as you correctly state. We all must stick to this script and focus on our practice with the "avatar!" smiles...

Vivianne points out the need to understand the instructions and to work with them. You will see how a few postings work. Did they follow the instructions? Did they help you decide how to proceed? You can ask them a question by clicking on their post and ask how they got to the point using the instructions provided. Instead of challenging them in public...you could say something like how can I deal with the question posed on the thread for my organization. This is a way of asking for help, but knowing that their posting seems to be a bit off the line. In trying to help you, they will reflect on what they posted. This is how both of you will learn and develop better skills.

Vanessa, the organization has to feel real to you even if it is a composite of several organizations. When people use avatars in games, these figures are real to them. Everyone will catch on. It is an experience for all.

Eliza has some great points. It is too bad the weather here has made this difficult. However, we are indeed resilient and we are scheduling backup dates to keep things moving. But the times originally agreed to will still be used for the work. We will work around all of this with the videotaped reviews.

Thank you Brian for sharing your experience! I am sure it will be helpful to all.

Loyd, I hope the external context is clear by now. We do these things in steps and everyone is always anticipating what they need to know and find it is in the next step. If it isn't, I will comment on it here or you can get in touch with me to check. Thank you for sharing your learning experience.

Anitha, similar organizations provide the information that you can assume was in the organization you are using. Remember it is NOT the origination that is important. It is your practice applying the method and knowledge that the real focus in this class. The organization itself is secondary at best. Also remember the community is the external context. As I stated above, it starts with the immediate neighborhood and then to the surrounding area and then to the

community at large. We will go no higher than that here in this course. The nice thing about action learning is that it is ALWAYS new, even when you have used it for years. It is flexible and allows a group of people to share experiences to help each other learn. We will actually get better at the skill of using action learning as we develop our OWN skills to use the knowledge that I am providing with methods to use them.

Beatriz, we do not need to know everything about the organization. The teaching staff (and you) is only interested if you are able to develop skill in using the methods and content provided to you in this course. The organization is an ‘avitar.’ It is all about you in this course. We want you to learn, practice, and be able to use. Lecture courses cannot do this.

Thread 3. Reflecting on the Challenges of Action Learning

We are not using Canvas. Canvas is a new platform that will replace the “isites” platform that we are using now. It is an open source platform and has a lot of flexibility to the instructor and students. However, this will not help here since we are not focused on knowledge learning. We are instead focused on skill development. It is more disciplined. Many of the students using Canvas are just as confused since many of the instructors have now mastered the art of using it. The site is configured in the sets of the process. You will find this VERY helpful when taking your take home mid-term and final exercises. If I moved material around, it would be very difficult to find and use effectively. There are no examinations in an action learning class. If confusion about the navigation is still a problem, talk to a TA or me as soon as possible.

Elayne – I need to use slides in the classroom to have them clear. I was using the screen only to show you where they were. I apologize for doing that. Canvas does NOT eliminate that issue. Professors use slides because they are lecturing. Lecturing is the worst possible way to learn. Studies show that students only retain about 10% percent from a lecture. I do not want to use slides because it means I am lecturing. I was trying to give you some information on how to use what is on the system, not to lecture on what it is that is on the system. That will NOT be helpful to you. We want to restrict learning to the action learning method, not to using CANVAS as an excuse for a professor to lecture to a class. This method has worked for 12 years. The student comments helped me win the Petra T. Shattuck Excellence in Teaching Award in 2008. The only other professor in our program to win this award is Professor George Buckley that does a lot of demonstrations. I cannot see how any lecturer can win this award with the 650 instructors in the Harvard Extension School eligible for the award each year. And to think that George and I did it without CANVAS and a chunkier version of isites. Smiles.... All boasting aside, I am confident that the system we are using now works fine. I will spend the summer and fall figuring ways to adapt CANVAS to this method rather than converting this learning method to CANVAS.

Cheryl, we had a master guide before and no one read it. They said it was too long. People have a choice. They can learn the hard way without the guides. Or they can read the guides and use them to ask better questions. Many people made it through the course without reading the guides. But they obviously struggled by not reading them. One guide will not work. The divided guides work only because when people don’t read them, we can refer them to the guide without having to navigate a 100 page document. You all have to trust me with this...smiles.

The action learning is just like real life. It is not like the professor's world behind the lectern with examinations to make sure you can regurgitate their materials on cue.

Lura, all the material is organized by steps. The same steps as the mid-term exercise and the final exercise AND the semester paper AND your exercises. You have such structure for developing any skill. You need the structure and discipline to learn the skill. This is not a lecture course. I will rest my case here. If anyone feels this way a few weeks from now, I have failed to convince you that this is the only way to master this skill. I have close friends that served in the military. They have an initial phase referred to as "boot camp." It is not pleasant, but it teaches them what they need to know to survive what they are preparing for. They do not get lectured. They do things in a very structured way. The approach in this course was developed over 13 years with over a thousand students from more than 50 countries. Please let me know if it is not working for anyone. I will work with you. I hope soon you will all be deeply involved in this approach.

Eliza, I think the information seems to be scattered because we are trying to catch up after missing the first class. I would not move information since you need it where it is to work on your exercises and final paper. After Week 3, we will be on schedule and everything will be in its place. The information IS IN ITS PLACE. We are struggling to catch up after the fact. I do feel that the instructions are very clearly presented and I gave reasons why I would not change the material from where they are. If this is still a problem when we catch up, then something is wrong.

Rachael, the organization of the course has been clearly presented in the syllabus and the guides. We have not deviated from the organization. I think people are confusing the organization with the lack of classes and there is little we can do about that. I have worked in the process improvement field for 40 years and have done so in about 30 countries around the world. As an expert on problem solving and decision making, I have found that every method available to us has the most difficult step as the first step. Chemistry is the same way. It has what is called the activation energy – a very steep grade of energy with the bond much lower on the other side. This is life. Once the bond is in place or the root cause method is mastered, it is always easy after that. You forget how difficult it was in the first place. There is no pain in being delivered knowledge in lectures. You memorize it and demonstrate your memory with your examination. The syllabus of this course (it is posted on the website) clearly differentiates this course as an action learning course. There are no other such courses in our program – true action learning. I am only doing what I said I was doing. The only difference is that we did not have a good start. However, even if we did, most people would be saying the same things until the method sunk in and they say, wow this is great. I am really learning how to do this. CANVAS cannot improve this..smiles...

Nadia, thank you for your observation! Most students feel that it is a lot of work to get going, but they find that they were fighting the action learning process by being so familiar with the lecture only feeding tube process. It works, but how much do you retain?

We are not moving over to CANVAS. I can reconfigure this site the way you want. But it will not help you. This method has worked well. It is the timing that is off. Never in the history of

the Extension School has this kind of start ever happened. As I write this material, I know for certain that we will miss the first four classes of a 13 class program with the most critical foundation steps in the first two weeks. You are confusing a catch up effort with confusion of the fundamental steps in this action learning method. There is nothing that rearranging the course can do to overcome the awkwardness of catching up in a program that depends on structured steps, posting and reflection. We cannot speed those things up. We cannot make them more organized. We have to go through and then reflect. Skill does not happen by osmosis – sorry.

Kelley – no one will get a bad grade as a result of this catching up and initial learning period under the handicap of four consecutive missed classes. I can promise you that! I want to have everyone ready for the first exercise in a little more than a month from now. CANVAS has never hosted an action learning course here at Harvard Extension School. CANVAS cannot take a lecture course and have it magically impart skill upon a student. I need to work this out over the time between the end of this course and January 2016. But, I need to get all of you caught up. Blaming the platform will slow the process down. Once we are caught up, the platform will be perfectly logical and useful. Even this period will be logical looking back.

Loyd, the approach and process is described on the site. It is the catchup effort that is the problem. I am doing the best I can to help everyone (including myself and the teaching staff) navigate this. We are looking at using the Collaborate tool to supplement what we have available now. More on that during the week.

Alla – thank you for this suggestion. It is what we have recommended here. I hope everyone will read your comment and give it a try. We do have a place for questions – it is the CLASS discussion that I am responding to now. Questions are terrific. Complaints are not quite as useful.

Anitha – the confusion in the discussion is only because people are learning how to use the thread structure. It is a universal structure and is described in one of the guides. However, I think people are catching on and I will explain it again when posting this coming week's threads.

Anitha – I don't believe that the other course that you signed up for is using the action learning method. We will go to CANVAS in 2016 after we adapt this learning method to that platform. WE are looking at using the chat in the coming week. It should help. I am glad that you find the learning method exciting – it really is!

Despite the snowstorms and missed classes, I think the instructions are very clearly stated and all the material is organized. It is the ability to provide advice on a timely basis that is the problem. However, for the past 12 years and last summer, we did have a normal start and people were still confused. Skill development take time! I played the piano and then the organ. Mozart developed more skill than I ever had in a very short time. Over a long time, I developed enough skill to get by without becoming a famous composer. This is what differentiates skill from knowledge learning. Julian is going back and forth because we have our classes knocked out of sequence rather than having the action learning out of sequence. We catch up next week.