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# Is this school a learning organization?

## 10 WAYS TO TELL



BY RON BRANDT

Leaders of schools, like leaders of businesses and hospitals, want their organizations to be flexible and responsive, able to change in accord with changing circumstances.

Individuals learn best when the content is meaningful to them and they have opportunities for social interaction and the environment supports the learning. That idea applies to organizations as well. To check

whether a school is functioning as a learning organization, its staff members and others need to consider this list of characteristics not as a checklist but as elements of the whole.

### **1 Learning organizations have an incentive structure that encourages adaptive behavior.**

Just as individuals learn when they are motivated to learn, organizations learn when they have a reason. The incentives to learn may be material or psychological, but one form of

incentive that everyone understands is money. Incentives exist at all levels of an organization. Financial incentives may be individual or organizational. Stephen Fink, assistant superintendent, wrote in 1992 that the Edmonds, Wash., school district had paid attention to incentives when it reorganized its categorical programs.

“The Edmonds district was an organization engaged in ‘learning’ new behaviors. To do so, it needed a set of incentives consistent with the new direction,” Fink wrote.



## A school culture that invites deep and sustained professional learning will have a powerful impact on student achievement.

the 'blending' process is highly labor-intensive. However, we believe it is necessary to promote school-centered decision making and reform" (Fink, 1992, p. 42).

### 2 Learning organizations have challenging but achievable shared goals.

Most organizations have publicly stated goals. Learning organizations have demanding goals that actually guide the organization and somehow gain the dedication of staff and other constituents.

In a school district, the most important goals are those dealing with student learning. Kevin Castner and his coauthors (1993) explained an ambitious plan developed by the Frederick County, Md., schools intended to ensure student achievement of five "Essential Learner Behaviors."

"In each curricular area, essential learner behaviors are supported by essential discipline goals, which, in turn, are supported by essential course objectives. For instance, a task that requires 7th graders to plan a field trip to a museum in Washington, D.C., could meet two essential course objectives: (1) collect, organize, represent, and interpret data, and (2) make estimates appropriate to given situations.

"These 7th-grade objectives support our K-12 mathematics discipline goal: to develop mathematical skills and reasoning abilities needed for problem solving. In addition, the lesson helps students gain skills in effective communication, social cooperation, and citizenship. Each level and grade of schooling, beginning in kindergarten, uses the foundation of individual courses and disciplines to build toward mastery of the learner behaviors at the top of the pyramid" (p. 46).

### 3 Learning organizations have members who can accurately identify the organization's stages of development.

Organizations change over time. In learning organizations, people can articulate the changes they are consciously trying to make and can identify where they are in the process.

Ruth Wade (1997), principal of Poquonock School in Windsor, Conn., reported that student behavior at her school had markedly improved.

"(C)hildren enjoy racial harmony and a sense of community, responsibility, and empowerment. A survey we conducted recently showed that our students rarely experience race-related problems at school. And they display relatively few behavior problems" (p. 34).

"A major hurdle to improving the achievement of low-performing and handicapped students was the various categorical program regulations. ... The Edmonds School District has not received any special waivers for program regulations. To support schools in their creative deployment of categorical resources, the district 'blends' federal, state, and local dollars according to each school's needs. Due to federal regulations that require extensive record keeping to track each employee's 'time and effort,' managing

Five years earlier, the situation had been very different.

“In September 1992, we greeted a number of hostile students and families who were not happy about being forced to attend our school. The result was a dramatic increase in behavior problems and racial incidents, problems that faculty members were unprepared to deal with.

“To improve schoolwide behavior and begin to build a new sense of community, our staff formed a Behavior Committee. We reluctantly set up a schoolwide Assertive Discipline Plan, designed to extinguish inappropriate behavior. ... Our assessment showed that our system was working in the short run; we saw improved behavior and a new school spirit and camaraderie. But we saw, too, that many students weren’t concerned about the impact of their behavior on others or about permanently displaying more responsible behavior; they were motivated solely by rewards. ... Clearly we were manipulating and controlling behavior instead of instilling sound values” (p. 34).

Wade’s article suggests that members of a learning organization are aware that their institution does not arrive at its final destination instantly but must develop one step at a time. They have a clear sense of what they’re trying to do, what progress they have made, and what still needs to be done. Wade recalled:

“After some reading, reflection, and visits to school with similar problems, we decided to change our approach. ... We dropped Assertive Discipline, our detention room, and the monthly award themes. Much to our surprise, students did not seem to miss the awards, and their behavior got no worse. ...

“Over the next two years ... we replaced rewards with schoolwide celebrations and replaced consequences with problem solving. Now when stu-

dents misbehave, we encourage them to reflect on their behavior and its effect on others. We then ask them to come up with a plan for restitution (if appropriate) or other solutions to the problem. ... As we have changed our focus from teacher solutions to student solutions, and given students more responsibility, our school climate has improved dramatically” (pp. 35, 36).

#### 4 Learning organizations gather, process, and act upon information in ways best suited to their purposes.

Organizations, like people, are different from one another, so they probably need to learn differently, too. To illustrate this idea, we need to look beyond the use of data to see how learning organizations use processes best suited to their purposes.

For example, Stephen Gross (1996) described how the Vermont State Department of Education went about establishing the Vermont Common Core of Learning, an effort to set direction for curriculum throughout the state. Recognizing that local school people might consider the initiative a dangerous intrusion and might therefore ignore the resulting document, the Department of Education decided to “bring as many people as possible into the process and use their ideas to create a powerful shared vision for the future. ... Instead of leaving the work to a blue-ribbon panel, we would go to the people of our state with a blank slate and use the focus forum process to ask some powerful questions about the needs of learners for the 21st century. In this way, committee members would shift their roles from writers to researchers and investigators. By bringing so many people into the act of inventing, perhaps we would have stronger results” (pp. 50-51).

When local districts adopt innovative curriculums, they may have the



#### LEARNING INDIVIDUALS

- Learn what is personally meaningful; what they feel a need to learn.
- Learn when they accept challenging goals.
- Go through developmental stages.
- Learn in their own way.
- Construct new knowledge by building on old.
- Learn through social interaction.
- Need feedback.
- Develop and use strategies. (Learn how to learn.)
- Learn well in a positive emotional climate.
- Learn from the total environment, intended and unintended.

opposite problem. New ideas will probably not be ignored, but they may provoke storms of protest. To avoid that, when the Ames (Iowa) Community School District began using a new mathematics program, Margaret Meyer and her coauthors (1996) listened for and carefully responded to parents’ concerns.

“At the beginning of the school year, the district sent parents letters describing the project and requesting permission to share student work as a

part of the data collection,” they wrote. “Every school involved held meetings with parents to give them information and to address their concerns. As the program began, school staff kept an informal record of parents’ questions and concerns, including those expressed at meetings, in telephone calls, interviews, and written surveys.”

### 5 Learning organizations have an institutional knowledge base and processes for creating new ideas.

What kind of processes might an organization use to strengthen its knowledge base and encourage creative ideas?

A good example may be CADRE (Career Development Reinforcing Excellence), developed by the Illinois Mathematics and Science Academy to replace traditional practices in supervision, evaluation, and professional development (Marshall & Hatcher, 1996). Faculty members progress through a series of interdependent contractual relationships with the Academy beginning with an initial two-year contract and leading to participation in the school’s Collaborative Accountability Network. At each stage, “the Academy expects teachers to model lifelong learning, to generate a change in how their students view and organize the world, and to actively promote the Academy as an exemplary educational laboratory. Second, the Academy expects teachers’ professional dialogue to conform to a number of conditions based on mutual respect and trust. For example, teachers need to adopt a collaborative role rather than an advocacy role, be open to learning from one another, and be willing to embrace risk.

“In turn, the Academy makes a commitment to teachers to provide them a climate that fosters their accomplishment of these standards and conditions. For example, the



### LEARNING ORGANIZATIONS

- Have an incentive structure that encourages adaptive behavior.
- Have challenging but achievable shared goals.
- Have members who can accurately identify the organization’s stages of development.
- Gather, process, and act upon information in ways best suited to their purposes.
- Have an institutional knowledge base and processes for creating new ideas.
- Exchange information frequently with relevant external sources.
- Get feedback on products and services.
- Continuously refine their basic processes.
- Have a supportive organizational culture.
- Are “open systems” sensitive to the external environment, including social, political, and economic conditions.

Academy gives them the necessary resources and support for their continued professional development, involves them in making decisions in which they are stakeholders in the outcomes, and provides them the academic freedom to explore controversial issues” (pp. 44, 45).

Other schools use different ways to inspire teachers to use their shared knowledge base creatively. Richard Ackerman and his coauthors (1996) note that professional development programs “are increasingly moving away from presentations by experts and toward programs that involve administrators and teachers as facilitators of their own renewal and growth.” Use of case studies is a method they have found particularly productive.

“The premise underlying our work is that the story form is a sense-making tool for educators. Writing their own stories can help them to better understand and share their theories of practice and dilemmas, and explore new possibilities with one another. At some point, participants begin to think differently — more critically and less self-centeredly. They are challenged and inspired to think more deeply about their practice and investigate ways to solve problems ... to make sense out of past behaviors and actions and generate new ideas” (pp. 21, 23).

### 6 Learning organizations exchange information frequently with relevant external sources.

Just as individuals learn by interacting with other people, organizations also learn from one another. R. Clarke Fowler and Kathy Klebs Corley (1996) described how Saltonstall Elementary School in Salem, Mass., connects with parents and community agencies.

“Our Parent Center, a 900-square-foot room on the first floor, is an inviting space with a couch, comfortable chairs, sewing machines, local newspapers (the *Salem Evening News* and *El Pointa*), toys for young children, and a pot of coffee warming on the stove. On hand is a full-time, paid parent coordinator, who is available to meet with parents and refer them to

the appropriate services. Currently, we are fortunate to have in this position a woman who is a long-term resident of the city who speaks both Spanish and English.

“We have contracted with two local agencies, North Shore Children’s Hospital and KIDNET, to provide services to students and families in need. These contracts allow the school and the respective social service agency to share information. Because the Parent Center is linked with the school’s networked computer system, we can also share appropriate information with teachers who are involved with the students” (p. 25).

The difference between settings in which information is freely exchanged and those where it is not is made dramatically clear in Tony Wagner’s (1997) account of a New Hampshire regional school district where “five quiet, picturesque villages ... (had) been at war with one another” (p. 28). The climate began to change as the result of a series of meetings led by Wagner in which board and community members, parents, teachers, and high school students discussed their goals, values, and immediate priorities.

“In February, the board and the union agreed on a new teacher contract in record time, and it contained the first raise for teachers in nearly five years,” Wagner wrote. “But many people were concerned about what would happen when the school budget came up for approval at the March town meeting. No one could have guessed the outcome: A substantially increased budget passed with a voice vote and no vocal dissension for the first time in several years.”

## 7 Learning organizations get feedback on products and services.

An important benefit from interacting with others is feedback. Mary Koski (1993), a teacher at Thompson

Junior High in St. Charles, Ill., recalled the staff-initiated changes her school district had made in recent years.

“We have now entered another step of the process, embedding the changes, working to meet the needs of our ‘customers,’ the students. At the end of each nine-week period, we ask the students to evaluate the work just done. Based on their input, we revise the curriculum. Student committees advise the principal on proposed changes at school, and students serve on the Total Quality teams, working to improve the transportation system, the cafeteria, and the high school’s integrated American Studies class. As members of the strategic planning committee, they help define the district’s future goals in curriculum, instruction, communication, finances, facilities, and technology.”

To get the feedback they need, schools must demonstrate a high degree of openness and trust. B.J. Meadows, principal, and her coauthors (1993) told about a highly unusual project in which parents were invited to observe classes, in some cases using video recorders. “The parent observations are giving us a clearer picture of what we need to continue doing well and what we need to improve” (pp. 33, 34).

## 8 Learning organizations continuously refine their basic processes.

A closely related characteristic of schools as learning organizations is their attention to processes, some of which have to do with communicating with constituents, gathering and using data, getting feedback, and the other characteristics already discussed.

The “basic processes” schools develop and refine are similar to the “learning to learn” strategies used by individuals. The connection between the two was made explicit by Robert Calfee and Clay Wadleigh (1992).

To help readers envision what an inquiring school is like, the authors offered “a few concrete sketches,” including one of North Shoreview Elementary, a school serving a multi-cultural, blue-collar neighborhood in San Mateo, Calif.

“At North Shoreview, Principal Evelyn Taylor was the initial catalyst for change. Quickly handing over the reins to teacher committees, she sparked this dialogue:

“What do you need to make the READ ideas work?’ ‘Smaller classes.’

“How can we make that happen? What can we do with what we have?’”

“The dialogue was genuine. The faculty wrestled with cost-benefit questions. They proposed and implemented a schoolwide plan for integrating regular and categorical programs to achieve more workable student-teacher ratios (still large by national standards, to be sure). ... They took on the responsibility for leadership not from a bureaucratic mandate, but through a problem-solving process directly supported by READ strategies” (pp. 28, 30).

While some processes develop gradually, as apparently happened in the Project READ schools, they may also come about in response to urgent need.

## 9 Learning organizations have supportive organizational cultures.

The literature on school climate and school culture is very extensive. I will oversimplify by saying the culture should be humane — psychologically comfortable, with warm human relationships — and professionally supportive — a place where people have the tools and training they need, and where they have opportunities to collaborate and learn from others.

Pauline Sahakian and John Stockton, staff members of a high school in Clovis, Calif., illustrated

both aspects of “supportive” with a teacher’s description of what she saw when she arrived for a meeting at which teachers were to discuss their observations of one another’s classes.

“As I stepped through the doorway of my administrator’s office, I was greeted by a checkered tablecloth, baskets of muffins and fruit, and a thermos of coffee. A party? No. The ever-dreaded administrator’s post-observation conference!

“Our administrator had set the stage for the English Department’s first collaborative post-observation conference. The ambience created a friendly, relaxed forum for discussing the instructional methodologies and philosophies of six teacher triads.

“Along with our administrator, we had all observed one another teach. Now we gathered to reflect on our practices in an effort to grow both personally and as a department of professional educators” (Sahakian & Stockton, 1996, p. 50).

## 10 Learning organizations are “open systems” sensitive to the external environment, including social, political, and economic conditions.

The way the Gwinnett County, Ga., public schools created a new set of standards for student writing is a good example of what it means to be an “open system.” Kate Kirby-Lipton and her coauthors (1996) wrote: “We knew it would be essential to involve parents in the standards-setting process. ... We had just survived a year of intense scrutiny of our instructional program by our community, and parents welcomed involvement in any improvement effort. More than 125 parents volunteered. Of those, we selected a group of 50 geographically representative parents (rural, urban, and so on). They joined 30 teachers in setting the standards during a two-week workshop.

“Using both the state’s rubrics for

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writing and the anchor papers, we trained parents and teachers to score papers holistically — that is, not trait by trait. We then selected a number of papers to represent levels 1-4 of the state’s rubric for middle schools and high schools and the six stages for elementary schools. ...

“To validate whether the anchor papers were on target, we submitted our high school papers to the University of Georgia for review. There, the director of the freshman writing program concluded that the students who had produced the most highly rated papers were on track for admission to that university and that the writers of the lower-rated papers would need further academic assistance to be eligible for admission” (p. 31).

What makes the Gwinnett County story especially notable is that school officials not only involved parents in setting standards for student achievement but also checked with the state university, an important “customer.”

### CONCLUSION

The quintessential characteristic of organizations that learn ... is to be fully and authentically engaged with the broader community, offering leadership but responding intelligently to social, economic, and political conditions. In today’s world, each school must be a learning organization.

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