

**HAS THE CHILD AND FAMILY COUNSELLING  
ASSOCIATION BECOME A LEARNING  
ORGANIZATION?  
FROM BAMBOO TO STEEL SCAFFOLDING**

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# TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	1
1.0 INTRODUCTION .....	5
2.0 PURPOSE.....	6
3.0 BACKGROUND .....	7
4.0 LITERATURE REVIEW.....	11
4.1 Normative Perspective.....	13
4.2 Developmental Perspective.....	18
4.3 Capability Perspective .....	20
4.4 Conclusion .....	23
5.0 CONCEPTUAL FRAMEWORK.....	25
5.1 Child and Family Counselling Association’s Environment .....	25
5.2 Shared Vision.....	26
5.3 Mental Models .....	26
5.4 Team Learning .....	26
5.5 Personal Mastery.....	26
6.0 METHODOLOGY .....	28
6.1 Research Design.....	28
6.2 Data Collection.....	28
6.3 Survey Instrument Design .....	29
6.4 Method of Analysis .....	29
6.5 Sample .....	30
6.6 Research Limitations .....	30
7.0 FINDINGS .....	31
7.1 Organizational Structure.....	31
7.2 Shared Vision.....	33
7.3 Personal Mastery and Learning.....	34
7.4 Team Learning .....	35
7.5 Mental Models .....	38
7.6 Conclusion .....	39
8.0 DISCUSSION.....	41
9.0 RECOMMENDATIONS .....	44
9.1 Organisational Structure.....	44
9.2 Shared Vision.....	45
9.3 Team Learning .....	45
9.4 Summary.....	45
10.0 EPILOGUE.....	47
REFERENCES.....	48
BIBLIOGRAPHY .....	49

## **APPENDICES**

APPENDIX 1: Learning Orientations and Facilitating Factors.....	51
APPENDIX 2: Article for Colander.....	53
APPENDIX 3: The Survey Questionnaire.....	54
APPENDIX 4: Participant Consent Form.....	60
APPENDIX 5: Summary of Questionnaire.....	62

## **FIGURES**

Figure 1: Single-Loop and Double-Loop Learning.....	14
Figure 2: The Four Modes of Knowledge Conversion.....	18
Figure 3: Learning Orientations and Facilitating Factors.....	21
Figure 4: Revised Hierarchy of Needs.....	22
Figure 5: The Child and Family Counselling Association's Conceptual Framework.....	27
Figure 6: Secondary Conceptual Framework.....	41

## **TABLES**

Table 1: Child and Family Counselling Association SWOT Analysis.....	9
Table 2: Model I and Model II.....	14

# **EXECUTIVE SUMMARY**

## **OBJECTIVE**

The objective of this report is to determine if the Child and Family Counselling Agency has become a learning enterprise or has adapted organizational learning methods into its infrastructure and to assist the agency in developing competencies to advance organizational learning.

## **SUMMARY OF METHOD**

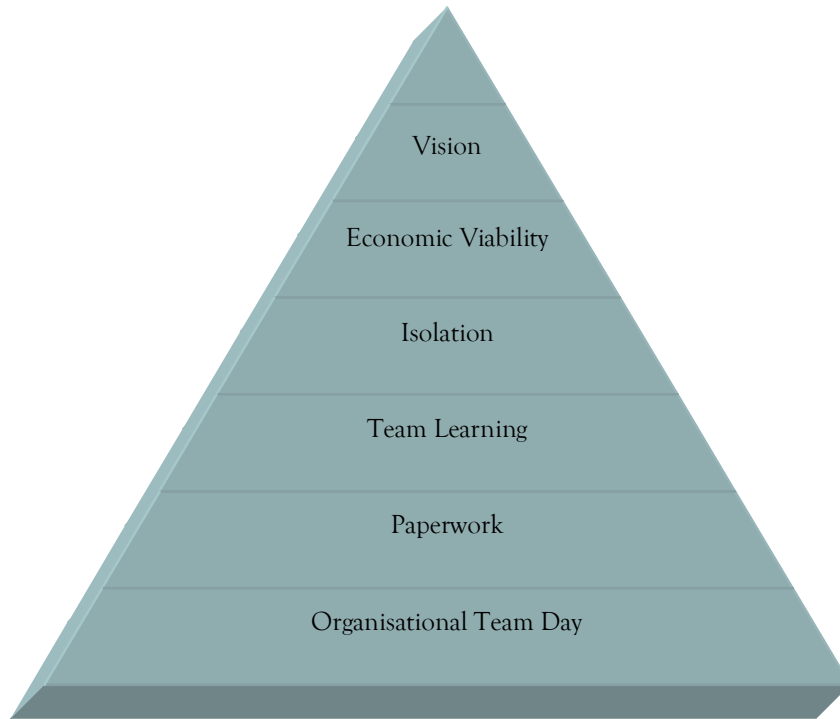
The research for this project consisted of personal interviews conducted with administrative, professional, and managerial employees of the Child and Family Counselling Association (CAFCA). CAFCA has 28 full-time equivalent staff positions and employs 50 people. Of the 50 employees, 19 were selected using an internet random number table to participate in this project.

Four males and seven females were interviewed. The average age for the group was 41 years; their academic achievements are clustered around post-secondary attainment: 64 percent have post secondary degrees, 27 percent have graduate degrees and less than 1 percent have secondary education only. Eighty two percent of the respondents were full-time employees, 18 percent were part-time personnel, 90 percent were professional staff, and less than 1 percent were administrative support staff. The respondents' years of service span the history of the organization: 55 percent of the participants have worked for the agency between 6 months to 5 years; 27 percent between 6 to 10 years and 18 percent between 11 to 15 years.

## **RESULTS**

It is unmistakable that this agency is endeavouring to chart a new future itself, by seeking out innovative economic opportunities, becoming an accredited body, developing a strategic plan, reviewing and reaffirming its vision and mission statements, and determining if it has the capacity to become a learning enterprise. The research findings indicate that organizational learning modalities do exist in this agency; in fact, I would argue that is a relatively high-functioning enterprise and from an organizational learning perspective would fall within the developmental organizational learning framework as described by Dibella and Nevis.

The research findings clearly point out that employees are satisfied with the agency's leadership and direction. Nevertheless, six reoccurring themes arose that will require future strategic planning and resolution by the agency executive. The pyramid that follows is a visual depiction of those themes.



## RECOMMENDATIONS

The conceptual framework identified several foundational learning factors that organisations have integrated, if learning is occurring in the organisation. The research findings clearly establish that these learning modalities are rooted in CAFCA.

The difficulty that lies ahead for this agency is shaping how it can engage in a change management process without placing further strain on its limited resources. More often than not, recommendations are hastily executed without first engaging in systems thinking and/or developing a work-plan to understand the ramifications of the proposed changes. I would suggest developing an eighteen-month to two-year work plan that incorporates an organisational systems analysis and an evaluation component. This will ensure a higher rate of success and can identify organisational weaknesses that could be corrected prior to operationalizing the recommendations.

The following recommendations have the potential to enhance the steel scaffolding of this agency and enable it to become the premiere non-profit employer of choice:

### *Organisational Structure*

- Economic viability is a serious concern for this agency. To ascertain potential opportunities, conducting an environmental scan of the private and public health, business, and social service sectors to ascertain current and future entrepreneurial

prospects would be advisable and could potentially enhance the agency's competitive advantage.

- The increase in the number of required reports since accreditation is staggering. It is recommended that the agency acquire the services of a software developer to build an electronic report delivery system.
- Staff isolation is a serious matter for this agency. Non-profit resources are limited; however, it would be worthwhile for the agency to seek a benefactor who could underwrite the cost of a new office location, in order to accommodate staff having office space. Should they fail to acquire a benefactor, the agency may consider renovating its existing premises to accommodate office space for staff. This would enhance the staff feelings of connectedness.
- The agency newsletter, the *CAFCA Colander*, could better serve its readership if it were revamped, focusing on research, clinical methodologies, best practices, economic innovation, and general information.
- Most successful enterprises are the direct result of strong leadership, and most organisations fail because of the lack of leadership. Developing a succession plan would ensure that CAFCA does not succumb to a leadership vacuum.

#### *Shared Vision*

- Staff recognition and understanding of the organisation's vision statement is limited. The vision statement needs to be embedded in the fabric of the organisation. This can be accomplished by embossing the statement on stationery, having the executive director articulate its meaning in the agency newsletter and espouse it at every available opportunity, and displaying an engraved plaque in a prominent place in the central office.

#### *Team Learning*

- Team learning is critical for the transmission of knowledge; I would advise the executive to consider developing cross-functional teams. The structure of these teams could be open-operating on a six-week rotational basis; this would allow for the majority of staff to participate. Their terms of reference could be issue-specific or activity-based.
- Scheduling an organisational team day may enhance staff sense of inclusiveness. This recommendation serves three purposes: it thwarts isolation, gives staff an opportunity to network and build relationships, and affords the agency executive an opportunity to articulate its vision.

The difficulty that lies ahead for this agency is shaping how it can engage in a change management process without placing further strain on its limited resources. This will be a daunting task for the executive and will require the participation of board members, and

collaboration with post-secondary institutions, in terms of developing practicum and cooperative education placements and building community partnerships.

More importantly, it is advisable that these initiatives are implemented in a way that minimizes the overall impact on staff. More often than not, recommendations are hastily executed without first engaging in systems thinking and/or developing a work-plan to understand the ramifications of the proposed changes. I would suggest developing an eighteen-month to two-year work plan that incorporates an organisational systems analysis and an evaluation component. This will ensure a higher rate of success and can identify organisational weaknesses that could be corrected prior to operationalizing the recommendations.

## 1.0 INTRODUCTION

Citizens in developed nations are demanding that their elected representatives eliminate government deficits, reduce government spending, and establish accountability measures for government-funded programs. Citizens are insisting on governance models that are premised on transparency, accountability, efficiency, and cost effectiveness. In British Columbia, the governing Liberal party has incorporated these objectives into their strategic plan. The strategic plan requires government ministries to operate efficient service delivery systems, demonstrate fiscal responsibility, and provide quality customer service, while simultaneously eliminating redundancy and downsizing personnel.

In this climate of doing more with less, provincial ministries are not the only agencies having to re-invent themselves in order to succeed in this rapidly changing public sector environment. Non-profit agencies are also re-thinking their service delivery models in the wake of staff and budgetary reductions. The depletion of human, social, and knowledge capital, coupled with the loss of organisational memory, is creating a cultural vacuum for non-profit agencies.

The Child and Family Counselling Association (CAFCA), like numerous other non-profit agencies, are experiencing this vacuum and drain in the wake of shifting economies. If this organisation is to flourish and survive in the 21<sup>st</sup> century, it is essential that it develops a culture that values innovation, risk-taking, devolved decision-making, creativity, curiosity, and critical thinking; in essence, it must become a learning organisation.

## 2.0 PURPOSE

The purpose of this research project is to identify and recommend strategies to support the executive of CAFCA in developing competencies to enhance the agency's ability to continuously learn. The research project objectives are:

- To determine if CAFCA is a learning organisation;
- To identify programs within the organisation that have adapted learning organisation disciplines; and
- To recommend strategies for integrating learning organisation disciplines throughout the agency.

This research is important because the majority of British Columbia's public service agencies are experiencing significant budgetary and staff reductions. As previously stated, embedded in these reductions is the depletion of an organisation's human, social, and knowledge capital.

For these organisations to survive and increase their competitive advantage, executives need to allocate resources toward improving their ability to continuously learn; they need to build capacity for critical thinking, risk-taking, decision-making, and creativity. The majority of research on learning organisations is focused on private sector enterprises. This project will add to the small, but growing, collection of literature on public sector enterprises.

This report is divided into eight chapters: Purpose, Background, Literature Review, Conceptual Framework, Methodology, Findings, Discussion, and Recommendations. It is my hope that those who elect to read this report will do so from beginning to end; however, some readers may discover that the Findings, Discussion, and Recommendations chapters are the most informative and would prefer to focus their thoughts on those chapters. For other readers, the literature review may appear far too lengthy for this report. This was an intentional choice. I want to provide individuals unfamiliar with organisational learning frameworks with an overview of the leading theorists and their perspectives. Regardless of where you commence your inquiry, I hope that this report raises questions for study.

### 3.0 BACKGROUND

The Child and Family Counselling Association (CAFCA) began in 1986, as a small non-profit society with ten full-time counsellors and a budget comprised of independently negotiated contracts. The agency's mandate was to provide counselling services to individuals, children, and families living in the Victoria Capital Region under the auspices of the Ministry of Social Services and Housing (CAFCA, 2003, p. 2). Since that time, CAFCA has increased its size and scope; currently the organisation has 28 full-time equivalent staff (50 people are employed by the organisation) and an annual budget of \$1.5 million, and provides services to clients in four program areas: *Risk Reduction*, *Youth Services*, *Community Living Services*, and *Autism*.

***Risk Reduction:*** “risk reduction services are focused on clear goals and involve clients in plans for meeting these goals through building on family strengths. Services include support in the following areas: healthy pregnancy, infant and child development, parent education, parent support, promoting family connection, safety of children, and crisis intervention”(CAFCA, 2003, p. 2).

***Youth Services:*** “youth services include support for youth who are in care of the Ministry of Children and Development, in the Ministry's Youth Agreements program or involved in the criminal justice system...counsellors working with youth provide support in the areas of : personal development, developing positive relationships, education and employment goals, housing, crisis intervention, dealing with government programs and developing skills and knowledge for independent living” (CAFCA, 2003 p. 2-3).

***Community Living Services:*** “[the] program serves individuals and families who are eligible for MCFD Community Living Services. Counsellors provide services that support individuals with cognitive disabilities and their families. These services assist clients in meeting their potential through: assessing and developing life skills, involvement in recreational and social activities, increasing independence, self sufficiency, and involvement in the community, and developing networks of support” (CAFCA, 2003, p.3).

***Autism:*** “[the program] offers a variety of services to children, youth and their parent(s). [Program counsellors] guide parent(s) through the process of accessing Autism Funding from the Ministry of Children and Family Development. CAFCA also helps parents understand options for autism services in the region, including services provided by CAFCA and those offered by other organisations and individuals. CAFCA's own services include Behavioural Consultation, Speech-Language Therapy and Autism Intervention on a one-to-one basis and in Social Groups. CAFCA also provides fast-track referrals to a parent advocate, psychologists, occupational therapists, trust fund management and payroll services”(CAFCA, 2004).

In 2003, CAFCA achieved a public service sector milestone; it became the fifth non-profit agency in British Columbia to attain accreditation status with the Council on Accreditation (CAFCA, 2003, p. 5). This was an important accomplishment for the

agency, because its funder, the Ministry of Children and Family Development (MCFD), is requiring all contracted community agencies to acquire accreditation. Accreditation is a component of MCFD's strategic shifts for transitioning the delivery of social services to five regional community governance boards. These strategic shifts are:

- To having open, accountable, and transparent relationships;
- To enabling communities to develop and deliver services within a consolidated, coherent, community-based service delivery system;
- To making strategic investments in capacity and resiliency building and providing funding for programs and services known to work. Capacity, in this context, means ability and potential. Resiliency is the ability to recover from challenging situations. The ministry believes that individuals, families, and communities have the capacity to successfully face and overcome challenges, provided that they are given the opportunities and necessary supports to build and integrate this capacity;
- To promoting family and community capacity to protect children and to support child and family development;
- To a community-based service delivery system that promotes choice, innovation, and shared responsibility; and
- To building capacity within Aboriginal communities to deliver a full range of services with emphasis on early childhood and family development (Ministry of Children and Family Development [MCFD], 2001, p. 2).<sup>1</sup>

These strategic shifts will culminate in a 10.66 percent reduction in CAFCA's operating budget commencing April 2004 (D. Burns, personal communication, 2004). This reduction was anticipated to result in organisational downsizing. If CAFCA intends to survive its budgetary and staff reductions, management must turn its gaze inwards and forge a new path, by focusing on the organisation's ability to become a learning enterprise.

In an attempt to turn its gaze inwards and in anticipation of the budgetary reductions, the agency held a strategic planning session in January 2004. The outcome of this session was that new mission and vision statements were developed, the agency's values and principles were reviewed and reaffirmed, and an environmental scan and SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) were conducted. Table 1 is a compilation of the agency's SWOT analysis.

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<sup>1</sup> Since this project began the Ministry of Children and Family Development has decreased the scope and timelines for transferring social services to community governance boards.

**Table 1: Child and Family Counselling Association SWOT Analysis**

Identified Strengths	Identified Weaknesses	Identified Opportunities	Identified Threats
<ul style="list-style-type: none"> <li>• Having a good reputation with the funding ministry</li> <li>• Track record of providing leadership within the community</li> <li>• Strong Executive Director and Management team</li> <li>• Expertise in program development</li> <li>• Dynamic and creative staff</li> <li>• Produce ideas on program development as a collective</li> <li>• A proactive culture organisational</li> </ul>	<ul style="list-style-type: none"> <li>• Dependent on only two funding sources</li> <li>• Working as a collective may slow process down</li> <li>• Weakness in ability to promote organisation</li> <li>• Lack of clear outcome measurements</li> <li>• The development of new programs taps into existing resources</li> </ul>	<ul style="list-style-type: none"> <li>• Potential to partner or improve relationship with Aboriginal communities and agencies</li> <li>• Become more entrepreneurial</li> <li>• Staff could develop new skills or look at the existing transferable skills that they have as CAFCA diversifies</li> </ul>	<ul style="list-style-type: none"> <li>• Ten percent budgetary reduction</li> <li>• Low staff morale</li> <li>• Increased demands from funding source</li> </ul>

In reviewing the SWOT analysis, there are several strategies that the agency could employ to improve its competitive advantage. First, CAFCA could create partnerships with agencies in the voluntary and the federal public service sectors (such as the Victoria Inter-Cultural Association, the University of Victoria Alumni Association, the local chapter of the Institute of Public Administration of Canada, and Human Resources Development Canada) to develop programs for constituents in those groups. Second, the agency could develop performance measurement instruments that could be licensed to similar non-profit agencies as a way to increase the agency's revenues. Third, the agency may wish to consider developing programs for seniors in light of the shifting demographics (within the next 10 to 15 years, 9.6 million adults will become senior citizens).

Often, those attributes that make an organisation successful in times of prosperity can hinder the organisation in times of crisis. This agency is no exception. Its strengths are a mirrored reflection of its weaknesses. There are no simple answers to combat these hazards; the most effective course of action is to engage in systems thinking. This requires examining issues as fluid filaments that affect the entire enterprise, not as dilemmas isolated to specific program areas or departments.

The identified opportunity section could be further developed; the agency may wish to perform an environmental scan of the private and public health and social service sectors to ascertain current and future entrepreneurial opportunities. This work could be designed as a project for a graduate student in a Business Administration or Public Administration program. The threats to the organisation are similar to those previous stated above.

The question arises, how will an organisation struggling to overcome so many formidable obstacles build capacity to become a learning enterprise? The rejoinder is rather transparent; its future direction is seemingly preordained to adopt organisational learning frameworks. Identifying which framework is best suited to this agency is the next step.

The literature review section will discuss and analyze three different organisational learning perspectives. From this discussion, a model will emerge that will be used to analyze whether the Child and Family Counselling Association is becoming or has the capacity to become a learning enterprise.

## 4.0 LITERATURE REVIEW

Several empirical theorists and practitioners are associated with developing the concepts and methodologies used to define and describe learning organisations: Chris Argyris, Ikujiro Nonaka, Anthony DiBella, Edwin Nevis, and Peter Senge (this theorist will be discussed in the conceptual framework). The majority of literature focuses on varying private sector industries such as manufacturing, financial and insurance services, and electronic and computer engineering.

There are three differing perspectives on what a learning organisation is and how it evolves: *normative*, *developmental*, and *capability* (DiBella & Nevis, 1998). Theorists who ascribe to the *normative perspective* argue that organisational learning only takes place under specific conditions and if those conditions are absent, learning does not occur.

Proponents of the *normative perspective* believe that there are prescriptive tasks or best practices that must be in place and if these elements are lacking, organisations are not learning enterprises. For example, learning organisations are skilled at systems thinking, engaging in dialogue, and team and experiential learning. Organisational leaders are charged with the tasks of creating conditions for these organisations to learn by establishing the methodologies that are crucial for learning to take place.

Interestingly, *normative* practitioners question whether organisational life is favourable to learning. “Barriers to learning exist due to the fundamental, conflicting ways in which individuals have been trained to think and act and from organisational barriers to discovering and using solutions to organisational problems” (DiBella & Nevis, 1998, p. 9). Organisational life prohibits individuals from witnessing the consequences of their actions, because often there are time delays, environmental factors, and unintended consequences that were not identified or considered during implementation. This can result in negative consequences; for example, the Ford Motor Company’s installation of the rear gas tank on the Pinto model resulted in vehicular deaths when the cars were involved in high-speed rear end collisions.

Practitioners who support the *developmental perspective* believe that enterprises can achieve learning through maturation, revolution, and/or evolution and leadership. “Organisations are known to develop as a result of their age, size, experience, industry growth or life cycle” (DiBella & Nevis 1998, p. 10). From this perspective, learning evolves as an organisation moves through developmental stages and learning processes become embedded in its memory. *Microsoft, Sony Corporation, Disney, IBM, BCE, and 3M*, are examples of organisations that have passed through their developmental stages of “initiation, maturity, crisis, and renewal,” have been transformed through technological innovation, and are continuously adapting and experiencing self-renewal (DiBella & Nevis, 1998, p. 11). Within the British Columbia public service sector, agencies such as *The Boys and Girls Club Services of Greater Victoria, Nisika Community Services, Nisha Child and Family Services*, and *The Elizabeth Fry Society* are examples of community agencies that have mastered their developmental life cycles.

Proponents of the *normative* and *developmental* perspectives acknowledge that learning is not innate to organisational life; it only takes place under prescribed conditions and must be avowed in the goals and vision statements of the enterprise.

Unlike the aforementioned perspectives, the *capability perspective* views organisational learning as a fluid process. In this perspective, organisations do not become learning enterprises; they are always in varying processes of learning. This is similar to individuals who are compelled to engage in activities that enhance their experiential or explicit learning. For these individuals, learning is part of their journey to attain self-actualisation. For example, a retiree who begins a second career in a field unrelated to their initial profession would match this profile.

All organisations are learning organisations, because they are social systems comprised of human beings. Humans have the capacity to produce knowledge and replicate learning:

Organisations develop and learn from experience either by strategic choice or by ageing. As organisations develop and solve problems of survival, they create a culture that becomes the repository for lessons learned. They also create core competencies that represent collective learning. Through organisational socialization, a learning process, knowledge and competence are transferred between generations of employees (DiBella & Nevis, 1998, p. 13).

For these reasons, all organisations should be labelled as learning organisations; however, for evaluative purposes, practitioners should distinguish between organisations that use specific learning methodologies and those that do not.

By classifying some organisations as “learning”, practitioners are implying that the remaining organisations are “non-learning”. This is impossible because human beings—the essential elements in organisations—think, and thought provides the capacity for learning.

The critical aspect of the *capability perspective* is how learning takes place and the activities that are learned. Learning processes are embedded in an organisation’s culture, are non-perspective, and take place in a myriad of forms. The tasks for managers are to determine how organisations learn and where learning occurs. For example, is knowledge being generated from developing new products and programs? Is organisational knowledge being generated by having access to industry best practices, in formal environments such as meetings and conferences, or in more relaxed settings such as lunch rooms, “coffee klatches”, or organisational social events such as the company picnic and/or Christmas party?

Each perspective—*normative*, *developmental*, and *capability*—has adherents and skeptics. In the next section, I will discuss four theorists/practitioners who are most closely aligned with organisational learning.

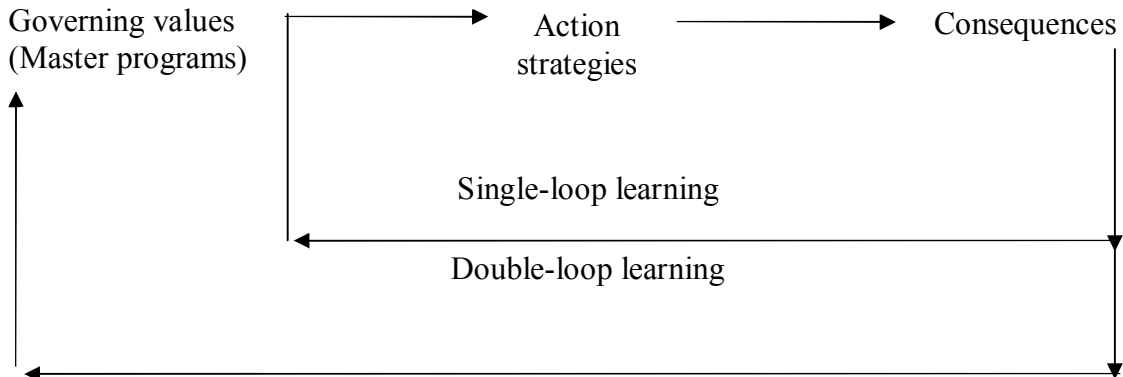
#### **4.1 Normative Perspective**

Chris Argyris' seminal work on "action and learning" was the groundbreaking treatise for understanding processes that corporations undergo to withstand adverse conditions. Argyris theorised that organisations, like human beings, engage in an action learning process. Knowledge and experience are acquired from detecting and correcting inaccuracies; "an error is any mismatch between intentions and actual consequences" (Argyris, 1993, p. 50). Correcting this "mismatch" is the beginning of the learning process. There are two different methods that can be used to correct this mismatch: single-loop and double-loop learning (Figure 1).

When the error detected and corrected permits the organisation to carry on its present policies or achieve its present objectives, then that error-and-correction process is *single-loop learning*. Single-loop learning is like a thermostat that learns when it is too hot or too cold and turns the heat on or off...Double-loop learning occurs when error is detected and corrected in ways that involve the modification of an organisation's underlying norms, policies and objectives (Smith, 2001, p. 3).

Behaviours can be altered without affecting the master program that produced the action; however, without modifying the master program the correction will have little long-term affect (Argyris, 1993; Argyris & Schön, 1974; Smith, 2001). Double-loop learning requires that objective and subjective facts be deconstructed to ascertain motives (Argyris, 2001). For example, a child who has been punished for bullying may cease the behaviour in the short-term because of the punitive response associated with the behaviour. However, if the reason (governing values) for the behaviour is not unearthed and challenged, and an intervention to correct the behaviour is not implemented, the conduct will continue unabated.

**Figure 1: Single-Loop and Double-Loop Learning**



From *Knowledge for Action: A Guide to Overcoming Barriers to Organisational Change*, by C. Argyris, 1993, San Francisco, CA: Jossey-Bass.

Argyris & Schön (1978) developed a framework, *Theories of Action*, to explain single and double-loop learning. The theory is the synthesis of research conducted with over 600 participants on strategies that they employ to make sense of their environments and actions. Individuals’ master programs “can also be viewed as theories of action that inform actors of the strategies they should use to achieve their intended consequences. Theories of action are governed by a set of values that provide the framework for the action strategies chosen” (Argyris, 1993, p. 50). Within the meta-theory are two sub-theories, *Espoused-Theory-of-Action* and *Theory-in-Use*, described as Model I and Model II. Both models have values and behavioural strategies that govern their operation (Table 2).

**Table 2: Model I and Model II**

<b>Model I: Theory-in-Use</b>	
<i>Governing Variables:</i>	<i>Action Strategies:</i>
1. Define goals and try to achieve them.	1. Design and manage the environment unilaterally.
2. Maximize winning and minimize negative feelings.	2. Own and control the task.
3. Minimize generating or expressing negative feelings.	3. Unilaterally protect yourself.
4. Be rational.	4. Unilaterally protect others from being hurt.
<b>Model II: Espoused-Theory-of-Action</b>	
<i>Governing Values:</i>	<i>Action Strategies:</i>
1. Valid information.	1. Design situations or environment where participants can be original and can experience high personal causation.
2. Free and informed choice.	2. Tasks are controlled jointly.
3. Internal commitment to the choice and constant monitoring of its implementation.	3. Protection of self is a joint enterprise and oriented toward growth.

From *On Organisational Learning* (2<sup>nd</sup> Ed.), pp. 181-183, by C. Argyris, 1999, Malden: Blackball Publishing.

Individuals often express espoused-theory-in-action as behaviours that they exhibit. In truth, it is theories-in-use that typically resemble their actual behaviours. These individuals are employing Model I characteristics. For example, a newly hired manager of a child welfare office informs her team that she values collaborative decision-making, open communication, risk-taking, critical thinking, and creative ideas. Within a few months, the team's experiences with the manager are counter to her espoused theory. The team witnesses an individual who micro-manages, triangulates communication, uses punitive and demeaning language to quash debate and inquiry, and blames the unit's lack of productivity on the incompetence of others within the larger organisation. If this manager was authentically engaged in Model II characteristics, the congruency between her words and actions would be witnessed as seeking out new ideas and embracing and demanding a high level of debate and inquiry from her staff. Brainstorming and problem solving would be acceptable forms of discourse. She would solicit dissenting opinions, articulate her concerns without humiliating, and willingly invite members of the larger organisation to participate in forums to discover structural barriers that may be thwarting the success of the entire enterprise. In essence, she would model double-loop learning and require her staff to practice double-loop techniques. Successful organisations operate within the realm of Model II double-loop learning (Argyris, 1993, 1999, 2001).

Unfortunately, moving individuals from Model I to Model II is not a simple task. It requires practitioners trained in human behavioural science, because of the interpersonal dynamics and defensive routines that individuals utilize whenever environmental or behavioural changes are required (Smith, 2001). Additionally, Argyris does not suggest an effective means for transitioning individuals from Model I to Model II. This could be problematic for managers who require prescriptions.

Peter Senge is perhaps the most widely recognized theorist/practitioner associated with organisational learning frameworks. Senge's model provides a cogent treatise for dissecting organisations to ascertain where learning maladies exist. According to Senge (1990), there are five elements that must be present if an organisation is functioning at peak performance: systems thinking, shared vision, mental models, team learning, and personal mastery. Each of these elements will be discussed in the following section.

### ***Systems Thinking***

Systems' thinking is not concerned with detecting, dissecting, and fixing isolated incidents. It concerns the recognition that once a problem has been identified, in all likelihood, it has had or will have impacts throughout the entire company. Systems thinking requires managers to appreciate that every aspect of an organisation is inextricably interlocked, and to engage in collective inquiry before deciding on a course of action (Senge, 1990).

For example, a toy becomes a popular item and the store depletes its supply within three days of receiving the shipment. To ensure that this does not happen again, the manager doubles his order the next week. Within hours of receiving this shipment the product is once again sold-out. To combat this, the manager triples his order the following week. The increased ordering continues for three more weeks. Eventually, the product loses

appeal and sales volumes return to normal levels. Unfortunately, the manager has over-extended his product expenditures and based his profit projections on a product with dwindling sales, so now he has a backlog of more product than he can sell, even at discounted margins.

This happened because the manager failed to analyse the problem using a systems thinking approach. If he had, he would have contacted the product representative and discovered that the item was being used as a promotional gimmick to entice customers from a competitor. Over time the hype would die down and sales would return to normal. The best course of action for the manager once his store sold out would have been to find other retailers in the area with more products and refer customers to those merchants. This would have saved him from terminating staff and eventually declaring bankruptcy.

Systems thinking is only one factor in which individuals committed to developing a learning organisation must engage. Developing an organisational vision is equally as important. Vision statements are the adhesives that hold companies together; without a vision organisations often falter.

### ***Shared Vision***

Members of high performing organisations often have opposing values, mores, beliefs, and experiences; nevertheless, they are bound together by a common organisational vision. According to Senge (1990), shared vision “creates a sense of commonality that permeates the organisation and gives coherence to diverse activities” (p. 206). Without a shared vision organisational learning cannot occur; “shared vision is vital for the learning organisation because it provides the focus and energy for learning” (p. 206). Bennis and Nanus (2003) view vision as moving beyond ‘coherence to diverse activities’; “vision animates, inspires, transforms purpose into action” (p. 29). For example, adoption social workers believe that there is a permanent home for all children in foster care, regardless of their complex medical needs, emotional and behavioural disturbances, and developmental delays.

### ***Mental Models***

In addition to having differing personal and shared visions, individuals also have varying mental models of the function and structure of organisations and social institutions; “images, assumptions, and stories, our “mental models” determine not only how we make sense of the world, but how we take action” (Senge, 1990, p. 175).

For example, three generations of women prepare the main course for Easter dinner in the same manner, by cutting off the ends of the pork when an outsider observed the third generation using this technique, she inquired as to its significance; the response she received was revealing in its absence of critical awareness of the behaviour. The cook did not know why she used this method, except that she had witnessed her mother prepare the dish in this manner and it seemed that the ham had a richer taste. To unearth the rationale for employing this method, the daughter questioned her mother who in turn stated that she had observed her mother prepare the dish and had integrated this approach. When the granddaughter discussed it with her grandmother, she was informed that the

reason that the ends were removed was that the grandmother never had a roasting pan large enough to fit the ham and could not afford to purchase a larger pan. Mental models whether they are based on familial or organizational experiences is the data that we use to guide our activities.

From an organisational perspective, working with organisational mental models requires the development of skills of reflection and skills of inquiry:

Skills of reflection concern slowing down our thinking process so that we can become more aware of how we form our mental models and the ways they influence our actions. Inquiry skills concern how we operate in face-to-face interactions with others, especially in dealing with complex and conflictual issues (Senge, 1990, p. 191).

Developing a learning organisation obliges the executive to explore the mental models that employees (including themselves) have regarding the agency's programs and policies. This exploration can only take place by unearthing the assumptions and beliefs that are embedded in the culture. One method for accomplishing this task is to encourage and foster team learning.

### ***Team Learning***

“Team learning is the process of aligning and developing the capacity of a team to create the results its members truly desire” (Senge, 1990, p. 236). Team learning is a component of shared vision, for without a vision, teams often falter and fail. There are three critical elements to team learning: “the need to think insightfully about complex issues, the need for innovative, coordinated action, [and] the role of team members on other teams” (Senge, 1990, p. 236). Fostering team learning requires building trust; “trust is the lubrication that makes it possible for organisations to work” (Bennis & Nanus, 2003, p. 41). This requires that managers learn to communicate, by practicing the art of dialogue and discussion.

David Bohm describes dialogue as having the capacity “to reveal the incoherence in our thought” (240). Team dialogue assists members to describe complex problems from numerous perspectives through a medium that allows for the suspension of assumptions whilst simultaneously enabling assumptions to be communicated; essentially, dialogue facilitates discussion without team members being penalized for having opposing or contrary views.

### ***Personal Mastery***

Organisations that operate cross-functional teams for the pollination of knowledge, and whose members engage in dialogue and discussion, will be successful. Within any profitable enterprise, developing a shared vision, unearthing mental models, and mastering team learning are meaningless endeavours unless employees feel that their responsibilities have meaning. This means that they feel they are able to take ownership for projects, that their contributions are recognized and affirmed, and that they are allowed personal mastery (growth and learning and practicing of new skills).

Organisations that view their employees as capital assets worthy of investment by providing opportunities for continuous improvement through learning, will be the 21<sup>st</sup> century innovators and employers of choice.

**Summary**

The above discussion focused on the theoretical frameworks of two normative theorists: Chris Argyris and Peter Senge. Their constructs have similarities and differences. Argyris examines organisational learning by analyzing if and how organisations employ *Theories of Action*, and Senge’s exploration begins by noting whether organisations have *Five Disciplines* within their social architecture. Their salient features are that both theories are prescriptive and elementary; they embody the basic processes that should be present if an organisation is on the verge of becoming a learning enterprise.

**4.2 Developmental Perspective**

Ikujiro Nonaka and Hirotaka Takeuchi (1995) assert that Japanese organisations engage in knowledge creation through the interplay between explicit and tacit knowledge. This interplay is not mutually exclusive but is inexplicably interwoven into the culture of these organisations. Nonaka and Takeuchi attribute the success of Japanese corporations such as *Honda*, *Matsushita*, and *Canon* to these organisations having the ability to engage in knowledge conversion through four approaches: socialization, externalization, internalization, and combination (Figure 2). In addition, the authors provide a description of the milieu that would support the four methods of knowledge creation.

**Figure 2: The Four Modes of Knowledge Conversion**

<b>Tacit Knowledge</b>	<b>To</b>	<b>Explicit Knowledge</b>
<p><b>SOCIALIZATION</b> Sympathized Knowledge</p>		<p><b>EXTERNALIZATION</b> Conceptual Knowledge</p>
<p><b>INTERNALIZATION</b> Operational Knowledge</p>		<p><b>COMBINATION</b> Systemic Knowledge</p>

From *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation* (p. 72), by I. Nonaka & H. Takeuchi, 1995, New York: Oxford University Press.

Socialization occurs through interaction; the master craftsperson communicates verbally and non-verbally their mental models, technical skills and behaviours, organisational history, and folklore. The apprentice absorbs the knowledge and practices the skills and behaviours. Integration is evident by the individual's effortless application of the skills. Tacit knowledge is externalized through symbolism, metaphors, and analogies; these are used to articulate experiential knowledge into concepts that can be disseminated (Nonaka & Takeuchi, 1995, p. 64). Concept development through symbolism may capture the essence of an idea, however its meaning may be imbued with varying interpretations. For example, a piece of cloth by itself is a material object, yet when used as a flag, it can denote freedom, democracy, capitalism, fascism, religion, terrorism, and sexual orientation. Knowledge transfer using this process is onerous because of its subjectivity.

Combination involves arranging concepts into 'knowledge systems'. Individuals store and exchange tacit knowledge through a myriad of external mediums such as computer networks, policy and procedure manuals, and telecommunications. By using a cultivating process of extracting, adding, categorizing, and reconfiguring information stored in these repositories, new knowledge is produced.

Vocational and graduate programs are examples of this approach. "The combination mode of knowledge conversion is most often seen when middle managers break down and operationalize corporate visions, business concepts, or product concepts; middle management plays a critical role in creating new concepts through networking of codified information and knowledge" (Nonaka & Takeuchi, 1995, p. 68). The authors also designed an organisational architecture that has the ability to learn, create knowledge, cultivate, and inoculate the four methods.

The ideal organisation that has the capacity to incorporate the four modes of knowledge creation is a hypertext organisation. "A business organisation should have a non-hierarchical, self-organizing structure working in tandem with its hierarchical formal structure. The central requirement for this design is that it provide a knowledge-creating company with the strategic ability to acquire, create, exploit, and accumulate new knowledge continuously and repeatedly in a cyclical process" (Nonaka & Takeuchi, 1995, p. 166).

Most western militaries and police agencies could be described as hypertext organisations. Embedded within their hierarchical structures are independently operating task forces. The Royal Canadian Mounted Police will assemble a task force to apprehend a serial killer or to infiltrate and gather intelligence on sub-culture groups. Metaphorically, a hypertext organisation could be described as a 'melting pot' whereby two differing structures come together to form a symbiotic partnership in the pursuit of knowledge creation:

A hypertext organisation, which is the dynamic synthesis of both the bureaucratic structure and the task force, reaps benefits from both. The bureaucratic structure efficiently implements, exploits, and accumulates new knowledge through internalization and combination, while the task

force is indispensable for generating new knowledge through socialization and externalization. The efficiency and stability of the bureaucracy is combined with the effectiveness and dynamism of the task force in a hypertext organisation (Nonaka & Takeuchi, 1995, p. 170).

The Child and Family Counselling Association appears to be a hypertext organization; embedded in its infrastructure is IntegralSolutions, an independent enterprise that supports the development and testing of new business ideas.

### ***Summary***

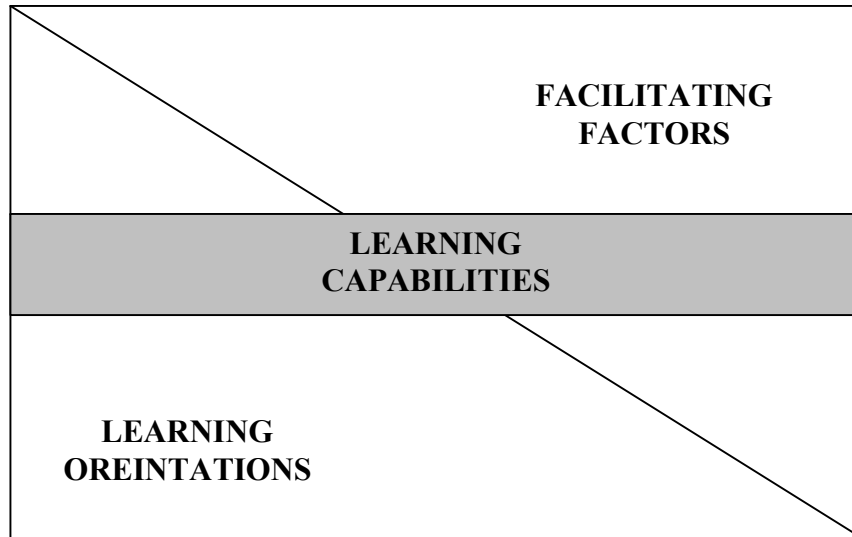
Ikujiro Nonaka and Hirotaka Takeuchi argue organisational learning is far more complex than normative theorists espouse. They contend that learning is an interplay between explicit (procedures, formulas, and policies) and tacit (experience, insights, and ideas) knowledge creation. Nonaka and Takeuchi perceive organisational learning as a developmental process that begins with building knowledge repositories and ends with the construction of a hypertext organisation. Hypertext organisations are two enterprises operating within one; the second is mainly dormant until the need arises.

## **4.3 Capability Perspective**

DiBella and Nevis (1998) have endeavoured to amalgamate western and Asian concepts into their organisational learning framework. “Our research indicated that developing learning capability requires an ability to describe how learning occurs and what gets learned and to evaluate characteristics that promote organisational learning” (p. 23). The authors’ view organisational learning as having three fundamental criteria: First, “...new skills, attitudes, values, and behaviours are created or acquired over time. Second, what is learned becomes the property of some collective unit. Third, what is learned remains within the organisation or group even if individuals leave” (pp. 25-26).

Learning organisations have fluid environments that can respond to customer preference and/or develop that preference before the consumer is aware of its existence. They have the capability to share information and experience across organisational units, thus eliminating territorial rivalry and the stovepipe effect. Finally, these organisations have developed databanks whereby tacit knowledge and experience can be codified, reducing redundancy and providing an organisational history. “Learning is about gaining experience, building competence, and avoiding the repetition of mistakes, problems, and error that waste resources” (p. 27). These assumptions are the pillars upon which their organisational framework is constructed. What is appealing about this framework is the theorists’ blending of the normative and developmental perspectives into their model. The framework comprises two parts: *Learning Orientations* and *Facilitating Factors* (Figure 3).

**Figure 3: Learning Orientations and Facilitating Factors**



- |                              |  |
|------------------------------|--|
| <b>Learning Orientations</b> | Describe how learning occurs and what is learned.<br>Based on culture and core competence. |
| <b>Facilitating Factors</b>  | Specify elements that promote learning.<br>Based on best practices and common processes.   |

In order to diagnose whether an enterprise is a “learning system”, both learning orientations and facilitating factors must be present, because without both an accurate diagnosis cannot occur (DiBella, Nevis, & Gould, 1996, p. 42). Within learning orientations there are seven modes that are representative of how knowledge is acquired and disseminated in an organisation (see Appendix 1).

These orientations are situated along a continuum; learning occurs at any position and there are no right or wrong locations (DiBella & Nevis, 1998, pp. 39-40). For example, when developing new programs some public sector agencies use knowledge acquired from their external environments, others may look internally to generate knowledge, and still others may use a combination of both methods.

Coupled with learning orientations are facilitating factors. However, unlike learning orientations, facilitating factors are normative; “... the more each is prevalent in an organisational unit the more opportunity exists for learning” (DiBella & Nevis, 1998, p. 61). Facilitating factors are best practices; they are conditions that promote learning.

DiBella and Nevis (1998) describe facilitating factors as “establishing an organisation’s learning potential. They do not guarantee that useful learning will occur, but if they are lacking, it is almost certain that the ability of the organisation to adapt to its environment or to engage in generative learning will be severely hampered” (pp. 61-62). They are the circuits that ensure the motherboard functions at its optimum. Strong leadership is the adhesive that maintains the organisation as it traverses this framework, for without the

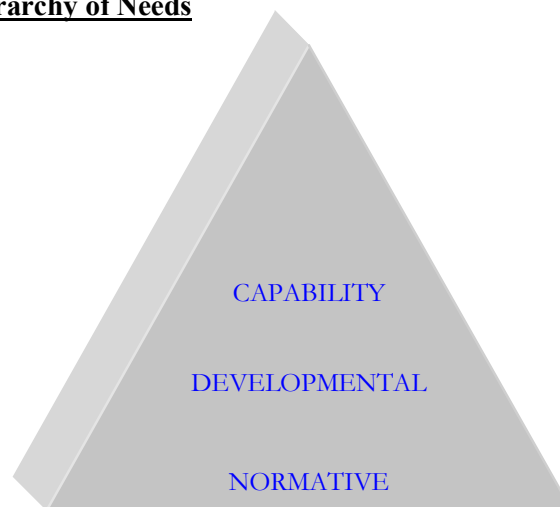
commitment of leaders, learning may fail to permeate throughout the entire organisational system.

### ***Summary***

The *capability perspective* offers a unique vista to viewing and probing organisational learning. These theorists, unlike their normative and developmental counterparts, conceive organisational learning as a never-ending process that begins at birth and ceases when the organisation dies. Dibella and Nevis assert that learning organisations have learning orientations and facilitating factors embedded in their structures. Learning orientations describe how learning occurs and what is learned, while facilitating factors specify elements that promote learning. Essentially, this perspective is a blending of normative and developmental perspectives.

Arguably, the literature review contains material that is dense, contradictory, esoteric, and convoluted; having said that, much can be gleaned from these perspectives. Perhaps the simplest method of describing and defining these frameworks is to consider them in terms of Abraham Maslow's Hierarchy of Needs (Norwood, 1997) (Figure 4):

**Figure 4: Revised Hierarchy of Needs**



The *normative perspective* could be viewed similar to Maslow's physiological and safety stage; this would be the first phase of organisational development. Once these tasks are incorporated the organisation can move forward on its developmental ladder.

In the 'Hierarchy of Needs' the next segment encompasses love and esteem needs; metaphorically these stages describe organisations operating with the *developmental perspective*. They have accomplished their primary developmental tasks and are now searching externally and internally to develop competence and acceptance. They are striving to be the best in their class and demonstrate their expertise.

Finally, the organisation reaches the pinnacle of its developmental life, the *capability* stage, or in Maslow's terms, the state of self-actualisation. At this stage, the organisation is no longer concerned with its external image for the sake of the image but is concerned

with the moral responsibility of being a good citizen and respecting the sustainability of all environments in which it interacts. Essentially organisations that reach this stage are acting in the interest of community and have reached the apex of organisational learning.

#### **4.4 Conclusion**

It is evident that leading and transforming an organisation can be an exhilarating experience. It requires leaders who can galvanise supporters to believe that their work has purpose while engaging in behavioural changes in hopes that a new organisational culture evolves (Bennis & Nanus, 2003). This process requires the patience of Job and the wisdom of Solomon. Metaphorically, this is similar to walking a tightrope without a net; it is a high-risk venture, which may reap untold rewards or be a devastating learning experience. Often, executives championing change leave before the process is complete.

Leaders implementing organisational learning modalities must recognise that change takes more than time; it involves communicating a vision, building trust, and demonstrating care and commitment to employees by modelling behaviours such as respect, authenticity, reciprocity, and listening. In other words, managers and staff require models to develop “new routines and practices that build frameworks for learning” (Argyris, 1993, p. xii).

Aside from requiring a vision, finding the ‘right’ methodology on which to build a learning enterprise is equally as difficult as leading the enterprise. Three differing frameworks were discussed in the literature review: normative, developmental, and capability. Each model has aspects that would enhance any organisation, depending on the organisation’s characteristics, leadership, budgetary allocation, and the purpose for implementation.

Building a learning enterprise is an expensive endeavour. For profit-generating businesses whose existence is reliant on consumer-driven products and services, allocating resources for organisational development is analogous to existing on life support. For organisations in the non-profit sector that are operating on diminishing resources, engaging in an expensive organisational learning transformation with no guarantee of success might appear foolhardy and seemingly out of reach.

Yet, non-profit organisations can implement learning modalities without having to engage in restructuring, depleting fragile resources, or hiring consultants, by simply borrowing best practices from enterprises in the private and public sector that have learning initiatives as part of their organisational cultures.

The Child and Family Counselling Association (CAFCA) and similar non-profit agencies are operating in a climate of public sector turbulence. In this era of continuous change, numerous organisations have lost their most valuable asset—people—, are operating on shrinking budgets, and are experiencing low staff morale.

If CAFCA and other non-profits are to transcend this furore, agency executives need to examine their agency's infrastructure in terms of its fluidity in adapting to change, its proficiency in using change as a learning activity, and its aptitude for resiliency.

The latter and former tasks can be accomplished by the executive by building upon the organisation's strengths, dissecting and exposing its limitations and weaknesses, and developing learning models premised on improving both. The organisational infrastructure needs to be juxtaposed against a learning framework in order to ascertain if and how learning is being incorporated and to determine the type of improvements, if any, that would enhance the organisation's ability to learn.

## **5.0 CONCEPTUAL FRAMEWORK**

### **5.1 Child and Family Counselling Association's Environment**

Both public and non-profit sector organisations are operating in environments that are ever-changing and competing; today's partners are tomorrow's competitors. Western governments are grappling with an economic and social landscape that is transitioning from the industrial age to the knowledge age. Coupled with globalization, shifting demographics, and the public demand for debt reduction, increases in social service programming whilst simultaneously trying to eliminate child poverty, homelessness, family violence and protecting the most vulnerable members of society (children and the elderly)—all without increasing taxation—are placing enormous challenges and stressors on agencies delivering social programming.

In British Columbia the provincial government has mandated that all social services that were once the domain of government ministries be decentralized to community governance boards. While this may allow for more citizen involvement in the delivery of social programs, the impact of decentralization will arguably be a dearth in social programming and the closure and/or amalgamation of agencies providing redundant services.

In this highly charged and stressed environment, CAFCA is grappling with budgetary reductions, downsizing, low staff morale, and personnel medical leaves resulting from increased work demands. For this agency, engaging in an organisational review may appear similar to strategic planning suicide.

Yet, this is the precise environment in which to conduct this activity because often during times of uncertainty and reform, organisational fractures are exposed that provide opportunities to establish “new routines and [develop] practices that lead to new frameworks for learning” (Argyris, 1993, p. xii). Developing new routines and practices for learning requires examining if and how learning is currently occurring within the agency.

After an initial review of the agency's operational and reporting structures and a review of the literature, I decided that the most effective methodology for examining this agency would be a normative perspective, specifically from modalities advanced by Peter Senge. I chose Senge because his hypothesis has primary modes that can be universally applied to any organisation, and his framework encapsulates the foundational key concepts of all three perspectives. The following is a listing of the concepts that will be used to examine CAFCA:

- Shared Vision
- Mental Models
- Team Learning
- Personal Mastery

In the following section, I will define each of these concepts.

## **5.2 Shared Vision**

Organisations cannot function or exist without members having an understanding of where they originated and where they are going. A shared vision is a common bond or belief system that binds organisational members together.

## **5.3 Mental Models**

Mental models are the images, assumptions, and stories that we devise to create function and structure in organisations and social institutions; “our “mental models” determine not only how we make sense of the world, but how we take action” (Senge, 1990, p. 175).

## **5.4 Team Learning**

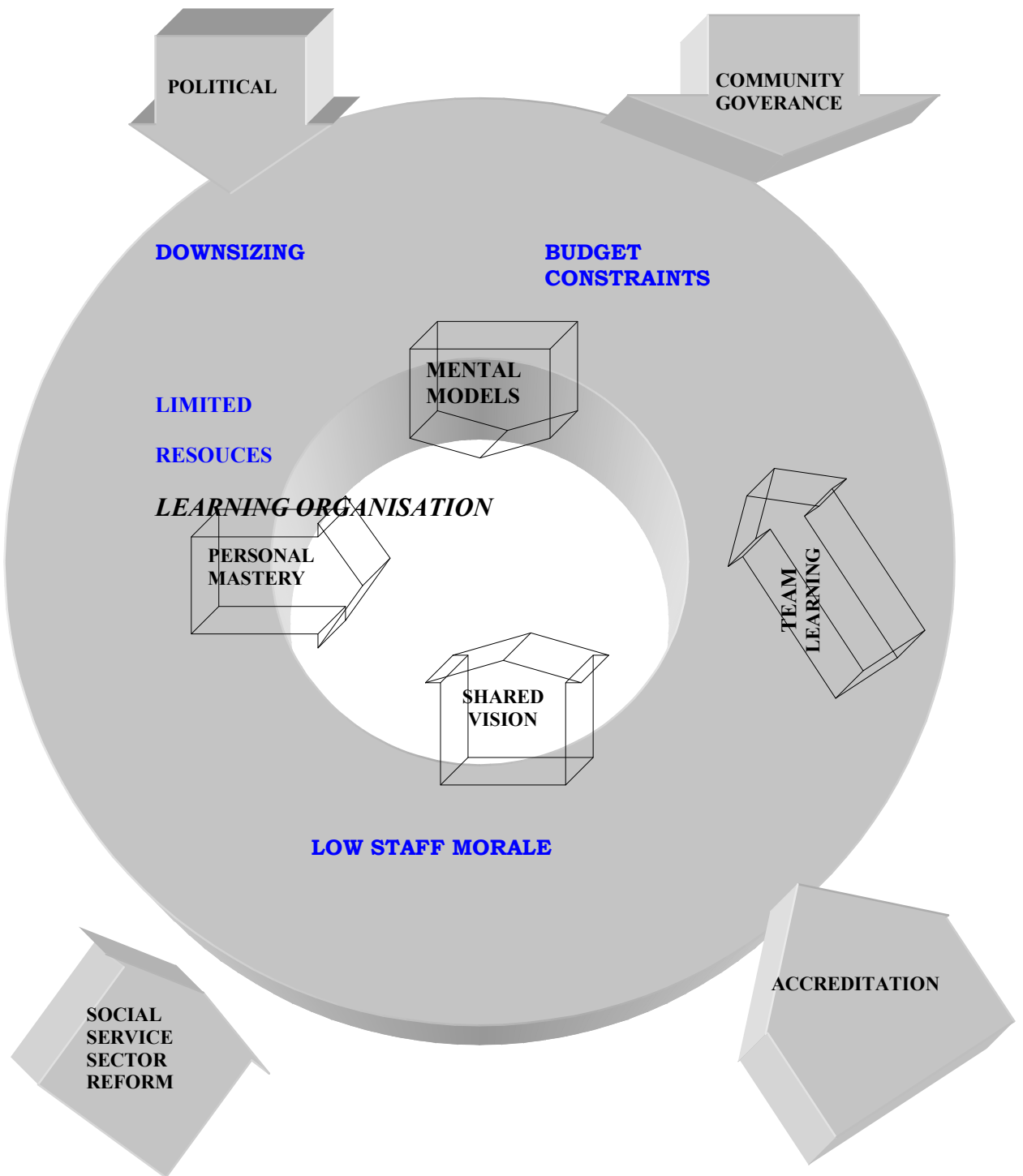
Team learning involves furthering individual learning by exposing personnel from different departments or program areas to differing ideas, concepts, and methodologies. Team learning enables the cross-pollination of knowledge and often enhances creativity and innovation.

## **5.5 Personal Mastery**

Personal mastery involves developing skills of inquiry and reflection and engaging in lifelong generative learning. Individuals who have high levels of personal mastery “take more initiative, ... have a broader and deeper sense of responsibility in their work ... and are more committed” (Senge, 1990, p. 143).

The conceptual framework provides a synthesis for determining if CAFCA has become a learning organisation and whether the agency has the capacity to integrate learning modalities into its infrastructure. Figure 5 is a visual representation of this framework.

**Figure 5: The Child and Family Counselling Association's Conceptual Framework**



## **6.0 METHODOLOGY**

### **6.1 Research Design**

The research project was designed to determine three factors: to determine if the Child and Family Counselling Association is a learning organisation; to identify programs within the organisation that have adopted learning strategies; and to determine competencies that will enhance the agency's ability to continuously learn.

The researcher decided that the best method to achieve the report's objectives was to conduct in-person interviews. This was done for three reasons. First, learning organisation theory is not widely recognized within the human service field. In-person interviews allow the researcher to provide clarification to participants if they had questions. Second, it is in the researcher's opinion that interviews are preferable to self-reporting questions because additional information can be deduced, thus adding depth and richness to the participants' responses. Third, conducting interviews ensures a high response rate.

The study consisted of personal interviews conducted with administrative, professional, and managerial employees of the Child and Family Counselling Association (CAFCA). CAFCA has 28 full-time equivalent staff positions and employs 50 people. Of the 50 employees, 19 were selected using an Internet random number table to participate in this project. In-person recorded interviews were conducted at the CAFCA boardroom.

Prior to beginning the research, a presentation was made to the Agency's Board of Directors and an informational article was published in the Association's newsletter regarding the project (Appendix 2).

### **6.2 Data Collection**

Prospective interviewees were initially contacted by electronic mail, and a general description of the research, including a proposed interview time and the survey instrument (Appendix 3), were provided. This was done to establish transparency and provide the respondents with a preview of the questions that would be discussed. Subsequent telephone contact was made with the selected participants, to confirm their involvement.

Of the 19 selected, 8 declined to participate for reasons ranging from familial crisis to change of employment. In total, 11 interviews were conducted over a six-week period. A joint follow-up interview was also conducted with two senior management personnel. Interviews were scheduled for one to two hours. The majority were completed within the prearranged time; however, one interview extended beyond this time to three hours in duration. Before commencing the interviews, the researcher provided a historical background on the rationale for the project and an overview of organisational learning perspectives, and described how the data would be used and stored. It was explained to

the participants that they could decline to answer any question and withdraw at any time. Respondents were informed that if they opted to withdraw during the interview, their responses would not be used in the report. Finally, the participant's consent form was reviewed and each interviewee was requested to sign the form, signifying their agreement to participate in the research (Appendix 4).

### **6.3 Survey Instrument Design**

The survey questionnaire used a combination of quantitative and qualitative questions. The quantitative section collected data regarding respondents' demographic profile such as gender, age, education, employment, and years of service. The qualitative section consisted of 18 questions. The questions were open-ended and divided into four sections: organisational structure/shared vision, personal mastery and learning, team learning, and mental models.

The first section, organisational structure, focused on the respondents' understanding of external and internal challenges facing the future longevity of the organisation; the participants' awareness of the organisation's direction; and how its vision statement emerged. The second section, personal mastery and learning, addressed specific mechanisms that allowed participants to practice critical thinking and decision-making and identified the consequences, both positive and negative, that were derived from those decisions. It also examined how errors were responded to, and investigated practices that could improve the organisation's decision-making processes. The third section, team learning, was designed to elicit views on the efficacy of teamwork; whether knowledge generated within groups filters into other sectors of the organisation; and if respondents had gained value from participating on teams. The final section, mental models, was structured to unearth organisational behaviours and practices that were taboo to discuss.

At the end of the interview, a question was added that was not on the questionnaire; this was done to allow respondents to explain how they would improve the organisation. Participants were encouraged to disclose as much information as they felt comfortable doing, because the interviews were being tape-recorded.

### **6.4 Method of Analysis**

Once the interviews were concluded the tape recordings were transcribed using an electronic transcription device. A content analysis method was used to analyze the transcribed text. First, responses to each question were coded and recorded verbatim in a summary table (Appendix 5). The summaries were then further analyzed to detect thematic patterns. Patterns were subsequently categorized into primary and secondary themes, by extracting commonalties between participants' statements and tabulating those commonalties using Microsoft Excel to develop a frequency distribution.

## **6.5 Sample**

The research group consisted of four males and seven females. The average age for the group was 41 years; their academic achievements are clustered around post-secondary attainment: 64 percent have post secondary degrees, 27 percent have graduate degrees, and less than 1 percent have secondary education only. Eighty-two percent of the respondents were full-time employees, 18 percent were part-time personnel, 90 percent were professional staff, and less than 1 percent were administrative support staff. The respondents' years of service span the history of the organisation: 55 percent of the participants have worked for the agency between 6 months to 5 years; 27 percent between 6 to 10 years; and 18 percent between 11 to 15 years.

## **6.6 Research Limitations**

Within any research project there are often strengths and weaknesses and this study is no exception. First, in all likelihood other researchers may characterize the questions as redundant, ambiguous, and inconsistent, and the methodology as insubstantial. In addition, they may feel that omitting the survey instrument pre-test phase was a dereliction of methodology; nevertheless, the rationale for omitting the pre-test phase was time. This research was being conducted during the summer, and in order to have sufficient participants, piloting the instrument was forsaken in favour of having a larger selection pool.

Another possible criticism could be that the respondents might be presenting an overly positive view of the agency because of the economic and political uncertainty that currently exist in the social service sector; they may want, as one participant expressed "to ensure that I got the right impression of CAFCA." To diminish this potential bias, I encouraged respondents to speak with candour, articulating the importance of utilizing this opportunity as a vehicle to effect organisational change, and stating that no comments would be attributed to a specific individual.

A final potential criticism is that the researcher may have misinterpreted respondents' comments based on her associated background and experience of being a former board member. To neutralize these impediments, the researcher strove to continuously use probing questions to clarify information and to assist the participants to add richness and depth to their answers. Finally, any mistakes, omissions, or misinterpretations are the fault of the researcher and are not reflective of the data or the participants.

## 7.0 FINDINGS

The research findings are presented in a format that allows the participants to speak for themselves, without significant editorializing for two reasons: First, learning theorists and practitioners would argue that the first step in building a learning organisation commences when you listen to and dialogue with employees, clients, and stakeholders. Second, the research question itself, has the Child and Family Counselling Association become a learning enterprise, is attempting to conclude how employees perceive their organisation. I believe that the only accurate method to portray their views is a narrative format.

### 7.1 Organizational Structure

The interviews began with the participants engaging in an environmental scan of the organisation's locality. The purpose for this was to determine the perceived impact the larger social service sector is having on the organisation. Five external and internal challenges were identified as having influence on the agency's current and future direction: organisational leadership, accreditation, economic viability, employee stress, and communication.

Interviewees unequivocally refer to the leadership as the driving force behind the organisation's success and they acknowledge that many struggles have arisen along the organisation's developmental path. Some respondents metaphorically referred to this path as moving from "old school style to new school."

- David is not ego based in how he runs CAFCA. He has an open mind about most of the things that go on here and he very staff oriented but he's also client centred. CAFCA is an organisation that respects individual working styles and is generous to those working styles.
- Okay in some ways he's pushed, pulled, prodded and dragged the agency into where it is now and it's been a good process. For some people it's been difficult but I think it's been overall, the best thing that could have happened.

Organisations are successful because those leading the enterprise have the capacity to 'read' the external and internal landscape, chart a course and stay that course, and inspire others to participate in the organisation's vision. In addition, these leaders recognise that being in control is an illusion and the most effective method of having power is to share it with others. These leadership attributes often form the underpinning of successful enterprises.

#### ***Summary: Organisational Leadership***

It appears that CAFCA's executive director has these attributes and it is his willingness to share power, to be authentic, and demonstrate respect for staff, stakeholders, and clients that makes him a successful and appreciated leader. Although the leadership has been successful in moving this agency "from bamboo to steel scaffolding" it would appear that

its transitory phase is still in progress and in all probability will not subside until the larger social service sector has stabilized.

All respondents voiced concerns regarding the impact that accreditation has had; it introduced efficiencies and added credibility whilst simultaneously increasing documentation.

- Accreditation came along and made us much more focused and efficient in different areas of the agency; it added some backbone to our organisation. We have structures and timelines and much clearer policies and procedures.
- The paperwork however, seems a bit excessive, intake forms are eight pages when we started they were a page and a half, now they are eight. If you do ten supervised visits in a week, you need to produce ten reports per week per client.

Often with the introduction of new systems, staff embark upon a learning curve. For those who can integrate new knowledge with minimal disruption to their established routines, learning new tasks appears effortless. However, for those staff who are already experiencing stress associated with working within this transient social service environment, increasing their responsibilities (although necessary to maintain the organisation's accreditation) could enhance anxiety.

#### ***Summary: Accreditation***

It might be advisable for the agency to consider establishing a grandfathering system where staff are given a six-month grace period to learn and develop efficiencies to manage the documentation process and/or have staff build paper-days into the scheduled hours of work.

The economic viability of this agency is an ongoing concern; respondents expressed it as being in a powerless relationship with the funder. Additionally, one respondent recognised the importance of their contractual obligations to provide services.

- Funding is one challenge that's ever present we have pretty much only one funding source. If we're not happy with the ministry being our funder, if you don't do the work then we [ministry] will find someone else who will.
- The other part of me recognises that we are here to do a certain job and the ministry has contracted us to do specific types of jobs and we should be responsive to their needs as our primary funder.

In the main, respondents identified the need to seek out new opportunities in an effort to move away from being financially indentured to one source.

- We need to break down some of the barriers that we have and think like a business and look for viable opportunities.

### ***Summary: Economic Viability***

Finding new economic opportunities to reduce reliance on the organisation's funding body should be the primary task of senior management. One mechanism for accomplishing this objective without exhausting resources is to establish a practicum or cooperative education placement. The purpose of this placement would be to conduct an environmental scan in the areas of health care, gerontology, and private sector employment assistance counselling.

Staff stress was a concern echoed by the majority of participants; many believe that the external political environment, coupled with the seemingly endless state of transition, is causing individuals to feel overwhelmed and has culminated in people displaying less tolerance for each other.

- A lot of staff are quite stressed and stretched to their limits and mentally probably burned out at this point. Low morale is also having an impact on personnel. It appears to be a residual effect from the constant state of change that is permeating the organisation and the social service sector. People are under more pressure having increased caseloads, coupled with the reduction in community services. The environment in the social service sector is not a healthy one. We are becoming a meatball industry; get them in get them out. I don't think things are client centred as they were before.

### ***Summary: Employee Stress***

In this era of social and economic reform, increased workloads coupled with diminishing social and human capital is taking its toll on personnel within the human service sector. Reducing stressors that may exacerbate feelings of powerlessness and low morale is vital to the well-being of agency personnel and the agency itself.

This could be done in a myriad of ways, such as having discussions on self-care or allowing staff to utilize their 'sick days' as 'wellness days' whereby they are required to engage in activities that will enhance their physical and emotional health. This method, although unorthodox, could also reduce the dollar cost of medical leaves that are a result of staff burn out.

## **7.2 Shared Vision**

Vision statements are analogous to roadmaps; they pinpoint your location and assist in navigating you to your designation. The majority of respondents, save one, did not attend the voluntary vision development process; regardless, they were adamant that the agency encouraged collaboration and their lack of involvement was not reflective of managerial exclusion but of scheduling conflicts, and for some, indifference. One respondent summed up the vision statement as:

- We had a vision statement but I can't remember what it was but think that it was kind of heart felt and very CAFCAish in that way.

Having a vision statement that only a few people are aware of serves little purpose. Disseminating the vision statement to staff and stakeholders would enable others to understand the intent and direction of the agency.

***Summary: Shared Vision***

There are several key points that respondents identified during this section of the interview. First, the organisation's leadership model is effective and requires little enhancement. Second, while accreditation has increased the organisation's community profile it has also added to the counsellors' workloads. Finally, the future economic viability of the agency is worrisome. Finding new opportunities for expansion should be a focal point of strategic planning.

**7.3 Personal Mastery and Learning**

Learning occurs in a myriad of forms, through the acquisition of codified and experiential knowledge. For learning to be effective individuals must be afforded opportunities to practice new skills and behaviours and to learn from decisions that are a result of this integration process.

On the whole, decision-making is a collective process and trust is the underlying principle that makes this a successful exercise for this agency.

- They really want to include us in the decision-making process and they trust us within the community to do our work and to do it well. To represent us as a professional organisation, I don't feel second-guessed. If I run into difficulty that I can't deal with and that may affect the organisation I can talk to David and I feel supported immediately.

Some respondents expressed that having opportunities to take on different roles within the organisation, has enhanced their understanding of the complexity of decision-making.

- I always try to remember as angry as I might get or put off by what is going on in the agency, I now know what's going on his [David's] side of the fence.

Regardless of whether outcomes were successful or not, being transparent and honest ensured a favourable response from management.

- I screwed up two months ago and I had to write a letter of apology to a client for some dumb ass thing I said in front of her. David was really good, he just said, you know what to do about it. So I did it [wrote a letter of apology] and it was done.

Individuals are given autonomy and responsibility for making decisions. It appears that the foundation for this authority is a reciprocal trust relationship that exists between the managerial staff and counsellors.

The majority of respondents expressed satisfaction with the organisation's decision-making processes. They also acknowledged that some individuals would be dissatisfied with decisions regardless of the process. One respondent, having spent a significant portion of their career in other agencies, expressed the following sentiment:

- For me this a breath of fresh air and I know people are bitching and moaning, there are certain types of people that will find things to complain about, no matter what, they don't realise what it is to work outside of this organisation.

Within most organisations, there are often a small number of individuals who express disdain as to how the enterprise is managed. It is far better to allow for their expression, because quashing it could be hazardous to the overall health of the organisation. However, the sentiment may spill over to the larger community and pale the agency's reputation.

### ***Summary: Personal Mastery and Learning***

How decisions are made and who is responsible for decision-making is an organisational cornerstone and provides instructive information as to the organisation's typology. Collaborative and participatory decision-making are key features of this agency; and melds with its flat organisational structure.

## **7.4 Team Learning**

Exposure to differing ideas, concepts, and methodologies often enhances creativity and learning. The most effective way for learning to pollinate throughout an organisation is to develop cross-functional teams. In this organisation, only one cross-functional team exists, the Continuous Quality Improvement Committee. When describing high and low-functioning aspects of teams, respondents referenced their program teams and the Peer Support Facilitators group.

The Continuous Quality Improvement Committee is the closest thing to a cross-functional team. Committee membership encompasses a representative from each program area, a member of the board of directors, and a representative from management. The committee's *raison d'être*:

is to contribute to CAFCA's positive organisational growth through a co-ordinated review of programs and practices, which incorporates the expertise of staff, management, board of directors, clients and other stakeholders in the community (CAFCA Policy Group: Organisational Governance: Organisational Structure, 2003, p. 5).

This group is deemed by the participants to have authority to make policy and organisational decisions and to review those in order to further the organisation's aspiration to:

[Create] a work environment that is supportive and encourages professional development and responsibility...[provide] simple, accessible administrative processes that allow us to document our work, demonstrate our success and make informed decisions about organisational change” (CAFCA Policy Group: Organisational Governance: Organisational Structure, 2003, p. 8).

As an organisation-wide group the Continuous Quality Improvement Committee is an excellent resource for issues relating to the agency as a whole. However, in terms of staff sharing best practices and improving clinical skills and knowledge, it would be advisable to establish a cross-functional team with representatives from each program area. This would reduce staff isolation and the stovepipe effect that is often inherent in organisations that do not integrate program areas.

The Peer Support Facilitators meetings are essentially supervisory meetings and in the main, the majority of participants lack clarity as to the function of this group.

- All the case facilitators from all the teams get together and to tell you the truth what they discuss and do, I'm not sure. You will need to ask a case facilitator.

Disseminating information regarding this group's activities would enable a broader understanding of its scope and purpose.

Establishing personal relationships is the factor that has allowed team members to work collaboratively and to trust each other's expertise and judgements.

- We go for lunch occasionally and once a month we have a barbecue. It's really good because the more we get to know each other on a personal level, the more we understand each other we have a [better] sense of the kind of baggage somebody is carrying and we can cut them more slack if you know what kind of shit they're worrying about. We need to cover for each other and we need to work as a unit. I want to know that I can count on you, if you're on my team.

### ***Summary: Cross-Functional Teams***

Trust is a fundamental principle to establishing any relationship. Within this organisation, trust is the overarching value that enables individuals to carry out their responsibilities without concern for being micromanaged.

On the other hand, when describing aspects of teams that do not work well, the majority of female respondents observed that in this current climate of uncertainty, individuals appear to be hypervigilant and sensitive and some interpersonal relationships are fractured.

- Everyone is taking things really super personally and there's discontent within our team. Personality wise, there have been clashes because tensions are so high; things that would normally just roll off your back are not now.

One respondent echoed the sentiments of many when they stated that team meetings are lacking depth.

- In our meetings they are now much more boring; I don't feel as though we get a kind of clinical sense of the work. We present cases, however, I would prefer if people were presenting cases that they were feeling unsure about or they were feeling emotional about, you know real stuff.

Another aspect of team learning that is problematic is isolation. Although individuals are members of teams, the vast majority of their work is conducted in solitude. Isolation thwarts team learning.

- One thing about CAFCA, you don't get a sense of the big picture, we work in an organisation of thirty-odd people and I would not know them on the street.
- We work very much in isolation; in fact, the only time we come together as a team is at staff meetings once a month if people choose to come.

### ***Summary: Isolation***

Team building is essential to maintaining a high-functioning enterprise. Within this agency there is much work that needs to be done before participants feel that program areas are operating teams. The first step this agency could take is to make staff meetings mandatory.

Interestingly all interviewees acknowledged the connectedness that could be derived from attending team meetings yet there appears to be conflicting value as to their worth.

- The highest priority I've been told is to deal with clients and team meetings are not mandatory.

The majority of respondents, save one, had not actively engaged with other teams nor sought their clinical expertise when working with similar client populations. One respondent found the experience invaluable, although finding the time to meet with the team was difficult.

- I've gone to the Esquimalt team to have them share their knowledge with me in regards to a type of client they see all the time. It does my client and me good when I can go and do this.

Overwhelmingly, all respondents stated that one way to improve isolation and have people get to know each is to have a mandatory off-site organisational day.

- A day during the week where we show up here at 8:30 and everybody puts their cell phones and car keys in a box and they load us on a bus and drive us somewhere everything is there, food, bocce ball and each group could make a presentation on what they're doing.

A significant feature of team learning is the sharing and advancing of knowledge. All participants recited poignant learning experiences that they have observed and integrated from working with teams. One respondent paid tribute to a former founding member.

- I think it was probably when Bruce was alive. Bruce brought to the team a very special perspective and I trusted his ethical and socialist stance on things. He's pretty wacky and all of those things but highly respectful and kind and had a very interesting take on the world. Certainly his perspective I valued probably the most in terms of the team.

The majority of examples provided by interviewees were less personal; one respondent shared an experience of knowledge transference and the impact that learning from others has had on him.

- I've had people close to me at CAFCA say a phrase and I'll go that sounds familiar, and he or she will say, I know you taught me that. And I have learnt stuff from them; I have learned more of this human stuff, touchy feely stuff from the people here.

### ***Summary: Team Functionality***

There are four key points that participants identified as important to improving the functionality of their teams: having empathy and compassion for team members, especially in this climate of uncertainty; developing a clinical supervision model; mandatory team meetings; and organising an agency team-building day.

## **7.5 Mental Models**

Individuals have varying mental models of the function and structure of organisations and social institutions; "images, assumptions, and stories, our "mental models" determine not only how we make sense of the world, but how we take action" (Senge, 1990, p. 175).

A gender difference was evident in respondents' belief that mental models are open to criticism. The majority of male respondents did not/do not have apprehension in expressing censure of agency practices and beliefs. In fact, they view this behaviour as being encouraged.

- It's a fairly vocal place, if I have an opinion and I voice it in a respectful way I don't feel suppressed from expressing my opinion.

Some female respondents expressed the opposite perspective; in fact, they identified four practices that they perceive as off limits from public discourse: leadership, communication being triangulated, decision-making, and mandatory training.

- David's partial management style where he may support you and then it changes and it's hard to trust that he truly supports you.
- Communication is indirect and sometimes gossipy, senior management will describe a situation involving a staff member without actually speaking to that person.
- Decisions are made with a limited number of people and then presented as a done deal. Training sessions are mandatory and if you don't attend you could have a letter placed on your file without anyone discussing it with you.

Two concepts were presented as to how management could improve the organisational environment in order that dissension could be expressed.

- A survey to give feedback about the work and how CAFCA is operating and allow teams to write letters so management can get a real flavour of how staff are feeling.

### ***Summary: Mental Models***

While decision-making and mandatory training are organisational practices that a few female interviewees perceive as closed topics, the majority of respondents believe that the organisation is highly transparent and are satisfied with how the agency operates. In fact, they believe that the structure and function of the organisation reflects its core values of dignity, open communication, honesty, and gentleness.

## **7.6 Conclusion**

Participants were forthright and candid in expressing thoughts and impressions of CAFCA. The majority of respondents believe that the agency is transparent and displays a high degree of accountability to the people it serves, and that the management team demonstrates respect for staff, clients, and stakeholders and is a strong supporter of community projects. On the whole, interviewees were content with the organisation's management and leadership.

However, there were gender differences, in terms of understanding the complexity of decision-making, how those decisions are communicated, and practices and policies within the agency that can be censured. These differences added a balance to the discussion because it brought to light the fact that although this agency is seemingly transparent and high-functioning, there are some issues that warrant further discussion and inquiry.

Additionally, the interviewees discussed several key factors that could enhance the agency's efficiency and effectiveness: organizing an agency team day, providing office

space for counsellors, developing a clinical supervision model, discovering new economic opportunities, improving communication, and demonstrating empathy and compassion for one another while the social service sector undergoes transformation and renewal.

In the following section, I will provide a discussion of the findings, propose recommendations, and develop strategies that will enable this organisation to implement those ideas without further taxing its limited resources.

## 8.0 DISCUSSION

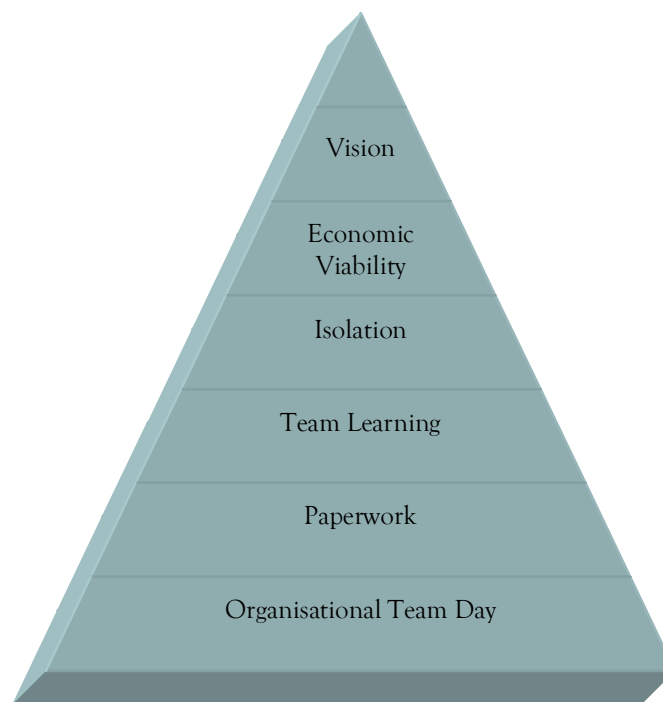
This project began by inquiring if CAFCA has become a learning enterprise and if the agency has the capacity to adopt learning modes into its infrastructure.

It is unmistakable that this agency is endeavouring to chart a new future. It is doing this by seeking out innovative economic opportunities, becoming an accredited body, developing a strategic plan, reviewing and reaffirming its vision and mission statements, determining if it is operating at peak performance, and identifying strategic methods for continuous learning.

The research findings indicate that organisational learning modalities do exist in this agency. In fact, I would argue that it is a relatively high-functioning enterprise, and from an organisational learning perspective, would fall within the developmental organisational learning framework as described by Dibella and Nevis.

The findings clearly point out that employees are satisfied with the agency's leadership and direction. Nevertheless, recurring themes began to emerge that exposed domains within the agency in need of enhancement. I have configured these themes into a secondary conceptual framework that could be used to guide the agency's future strategic planning and as an instrument for evaluating the future progress of the organisation. Figure 6 is a depiction of the framework.

**Figure 6: Secondary Conceptual Framework**



No organisation can exist without a vision and leaders cannot lead without it. Bennis and Nanus (2003) articulate vision as “shared meanings and interpretations of reality, which facilitate coordinated action” (p. 37). Creating a vision is the first step and espousing that vision is the leader’s fundamental organisational role. The vision statement should permeate every facet of the organisation; it is the beacon of light that guides the organisation through calm and turbulent seas.

Although the Child and Family Counselling Association (CAFCA) has a vision statement, it is evident that no one is cognizant of its meaning. This is problematic and can be rectified by embossing the statement on all organisation stationery; developing a vision forum in the agency’s newsletter; and having the executive director articulate its meaning to staff at every available opportunity.

***Economic viability:*** A distinguishing feature that separates public and private organisations is the business environment. Public agencies often operate as monopolies and are budget driven whilst the survival of private organisations is contingent upon the marketplace. Of late, this equation has begun to shift and economic sustainability is becoming a paramount consideration for most non-profit agencies; CAFCA is no exception. Developing entrepreneurial opportunities should be the primary goal of this organisation for the next five years; this could be done through its ancillary agency IntagralSolutions. Nonaka and Takeuchi (1995) would describe IntagralSolutions as a hypertext organisation. This would be an excellent site to test out new ideas without impinging upon the reputation and domain of the larger agency.

***Staff isolation:*** Counsellors, although attached to teams, are predominately independent; their vehicles and domiciles are their workstations. This duality of attachment and detachment is analogous to working in a networked or virtual agency. Lipnack and Stamps describe a network organisation as “...independent people and groups act as independent nodes, link across boundaries, to work together for a common purpose; it has multiple leaders, lots of voluntary links and interacting levels” (as cited in Skyrme, 1999, p. 1). Reducing isolation by endeavouring to change the nature of the work that staff perform is not an alternative; however, isolation could be lessened if the agency would designate an office, equipped with telephones and computers, for staff use.

***Team learning:*** is an area that could be vastly improved by this agency. Staff meetings should be built into scheduled work time and made mandatory. In addition, cross-functional teams, with the exception of the Continuous Quality Improvement Committee, have not been initiated. Research participants recognise that there is a wealth of knowledge buried within the organisation; they all referred to the listing of staff specialities that is accessible through the administrative office. This directory is an important tool that should be an active feature in the organisation’s toolbox. The directory would be best utilized if it were prominently displayed on the agency’s website, with a picture and short biography of each person, including contact information such as electronic mail address; this may also assist in diminishing employees’ sense of isolation.

The organisation's newsletter, the CAFCA Colander, is another source that could be used to facilitate learning. This would require revamping the newsletter to make it similar to an academic/professional periodical that focuses on research, literature reviews, clinical methodologies, social service sector best practices, and general information.

Additionally, Peer Support Facilitators play a vital role in communicating information between the managerial sector and counsellors. Unfortunately, the group's activities are seemingly unknown. Developing a column in the agency's newsletter entitled the 'Facilitator's Corner' may assist in disseminating the team's activities.

***Managing workloads:*** As a result of the voluminous increase in reports that has occurred since the advent of accreditation, workload management is causing stress for some personnel. It would be advisable to have the Continuous Quality Improvement Committee determine the feasibility of reducing the number of reports and/or adapting to an electronic delivery system. Until this comes to fruition, there are commercial software products that can be customised to electronically input recurring data after an initial data entry and paper reports could be adapted by developing electronic report templates.

***Organising a team day:*** This organisation has grown extensively since its beginnings and with growth often comes remoteness; for many employees there is a sense of being an island unto themselves. The organization as a whole might benefit from a team day; activities could include team presentations, guest speakers, and staff appreciation awards.

## 9.0 RECOMMENDATIONS

The conceptual framework identified several foundational learning factors that organisations have integrated, if learning is occurring in the organisation. The research findings clearly establish that these learning modalities are rooted in CAFCA. In addition, a secondary framework evolved out of the primary framework, and that is the underpinning of the recommendations. From this point, developing the recommendations was more or less straightforward, considering the work had already been achieved based on the findings and discussion sections.

The difficulty that lies ahead for this agency is shaping how it can engage in a change management process without placing further strain on its limited resources. This will be a daunting task for the executive and will require the participation of board members, and collaboration with post-secondary institutions, in terms of developing practicum and cooperative education placements and building community partnerships.

More importantly, these initiatives must be implemented in a way that minimizes the overall impact on staff. More often than not, recommendations are hastily executed without first engaging in systems thinking and/or developing a work-plan to understand the ramifications of the proposed changes. I would suggest developing an eighteen-month to two-year work plan that incorporates a organisational systems analysis and an evaluation component. This will ensure a higher rate of success and can identify organisational weaknesses that could be corrected prior to operationalizing the recommendations.

The following recommendations have the potential to enhance the steel scaffolding of this agency and enable it to become the premiere non-profit employer of choice:

### 9.1 Organisational Structure

- Economic viability is a serious concern for this agency. To ascertain potential opportunities, an environmental scan needs to be performed of the private and public health, business, and social service sectors to ascertain current and future entrepreneurial prospects.
- The increase in the number of required reports since accreditation is staggering. It is recommended that the agency acquire the services of a software developer to build an electronic report delivery system.
- Staff isolation is a serious matter for this agency. Non-profit resources are limited; however, it would be worthwhile for the agency to consider locating a benefactor who may have the resources to underwrite the cost of a new office location, in order to accommodate staff having office space and/or renovate its existing premises to accommodate office space for staff.

- The agency newsletter, the *CAFCA Colander*, could better serve its readership if it was radically revamped and modeled after an academic/professional journal. The new focus could cover a variety of subject areas such as: research, clinical methodologies, best practices, economic innovation, and general information.
- Most successful enterprises are the direct result of strong leadership, and most organisations fail because of the lack of leadership. Developing a succession plan would ensure that CAFCA does not succumb to a leadership vacuum.

## **9.2 Shared Vision**

- Staff recognition and understanding of the organisation's vision statement is limited; this is problematic. The vision statement needs to be embedded in the fabric of the organisation. This can be accomplished by embossing the statement on stationery, having the executive director articulate its meaning in the agency newsletter and espouse it at every available opportunity, and displaying an engraved plaque in a prominent place in the central office.

## **9.3 Team Learning**

- Team learning is critical for the transmission of knowledge; therefore it would be prudent to consider having mandatory staff meetings. Developing cross-functional teams could enhance the transmission of knowledge within the agency. The structure of these teams could be open-operating on a six-week rotational basis; this would allow for the majority of staff to participate. Their terms of reference could be issue-specific or activity-based.
- An organisational team day is advisable. This recommendation serves three purposes: it thwarts isolation, gives staff an opportunity to network and build relationships, and affords the agency an opportunity to articulate its vision. The day should be mandatory and offsite. It should be the sole responsibility of the executive to organize and should include a staff recognition ceremony.

## **9.4 Summary**

There is no disputing that CAFCA is a successful organisation that has weathered numerous developmental milestones to reach maturity. More importantly, along the way CAFCA has integrated learning modalities into its social architecture. Yet, there are still hurdles that this agency needs to overcome, if the desire of the executive is to continue erecting an organisation that has the capacity to learn.

The findings section uncovered five areas that warrant future consideration. The discussion section provided an analysis of how this planning could potentially occur. This begs the question, how does an organisation struggling with budgetary cuts, downsizing, and low morale, find the resources to fulfil their objectives?

To begin, I would caution the executive to refrain from implementing any immediate changes with the exception of organising an agency-wide team day. There are three reasons for this: first, this agency desperately requires a team day. Staff are not familiar with each other and a team day will give people an opportunity to experience the growth of the organisation. For some individuals this will be the first time they are formally introduced. Second, some people are still digesting the upheaval that they have experienced in the human service sector over the past year and a half, and more changes could potentially add to their stress level. Finally, the team day could be used as the catalyst to introduce the findings from this project, and as a platform to muse on how the agency could utilize its limited resources to implement the report recommendations.

## **10.0 EPILOGUE**

Since its inception, the Child and Family Counselling Association (CAFCA) has undergone numerous internal and external transformations and each phase has strengthened its social architecture and aided the agency in mastering its developmental milestones. The agency executive has been a staunch supporter and champion of this project since its beginning, and is committed to implementing changes that will improve the organisation's competitive advantage, capacity to learn, and make it an employer of choice in the new millennium.

It is my sincere hope that the information contained in this report will be of utility to the agency, and that it will be used as a catalyst by other agencies to conduct similar research.

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## APPENDIX 1: Learning Orientations and Facilitating Factors

<b>Learning Orientation</b>	
Knowledge source	Preference for developing knowledge internally versus seeking inspiration in ideas developed externally.
Product-process focus	Emphasize accumulation of product knowledge versus expanding competencies in basic processes.
Documentation mode	Knowledge seen in personal, tacit terms, as something possessed by individuals versus being seen as explicit statements of publicly available know-how.
Dissemination mode	Emphasize informal methods of sharing learning, such as role modeling and communities of practice, versus formal prescribed organisation-wide programs.
Learning focus	Emphasize incremental, single-loop learning versus transformational, double-loop learning.
Value-chain focus	Center learning investments on ‘design and make’ side of the value chain versus the ‘deliver side.
Skill development	Stress development of individuals versus development of teams or groups. Emphasize individual skills versus skills in learning and working collectively.

<b>Facilitating Factors</b>	
Scanning imperative	Interest in external happenings and in the nature of one’s environment. Valuing the processes of awareness and data generation. Curious about what is ‘out there’ as opposed to ‘in here’
Performance gap	Shared perception of a gap between actual and desired state of performance. Disconfirming feedback interrupts a string of successes. Performance shortfalls are seen as opportunities for learning
Concern for measurement	Spend considerable effort in defining and measuring key factors when venturing into new areas; strive for specific, quantifiable measures; discourse over metrics is seen as a learning activity.
Experimental mindset	Support for trying new things; curiosity about how things work; ability to ‘play’ with things. Small failures are encouraged, not punished. See changes in work processes, policies, and structures as a continuous series of graded tryouts.
Climate of openness	Accessibility of information; relatively open boundaries. Opportunities to observe others’ problems/errors are shared, not hidden; debate and conflict are acceptable.

<b>Facilitating Factors</b>	
Continuous education	Ongoing commitment to education at all levels; support for growth and development of members.
Operational variety	Variety exists in response modes, procedures, systems; significant diversity in personnel. Pluralistic rather than monolithic definition of valued internal capabilities.
Multiple advocates	Top-down and bottom-up initiatives are possible; multiple advocates and gatekeepers exist.
Involved leadership	Leadership at significant levels articulates vision and is very actively engaged in its actualization; takes ongoing steps to implement vision; 'hands-on' involvement in educational and other implementation steps.
Systems perspective	Strong focus on how parts of the organisation are interdependent; seek optimization of organisational goals at the highest levels; see problems and solutions in terms of systemic relationships.

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## **APPENDIX 2: Article for Colander**

### *Research Project*

#### *Has the Child and Family Counselling Association become a Learning Organisation?*

Commencing April 15<sup>th</sup>, 2004, Renaa Bacy a graduate student in the Public Administration Department of the University of Victoria will begin conducting a research project to discover if CAFCA is a learning organisation. The purpose of this project is two fold first, to provide a foundational analysis for the agency to use in developing a strategic plan premised on methodologies associated with learning organisations and second, to ascertain if CAFCA is utilizing its human and knowledge capital to capacity in enhancing its service delivery systems?

The research involves interviewing 4 to 6 CAFCA employees. The participants will be asked a series of quantitative and qualitative questions regarding the organisational structure and the connectedness between employees the agency. The interviews should take approximately 1 to 2 hours. Participants will be randomly selected both auxiliary and full-time staff will have an opportunity to participate in the research study. Once the selection process has occurred, Renaa will contact the selected participants to arrange an interview time. If anyone would like to discuss this project with Renaa feel free to contact her at 519-1007.

## APPENDIX 3: The Survey Questionnaire

Questionnaire for Child and Family Counselling Association
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*Participation in this study is strictly voluntary. Participants are under no obligation to participate and at anytime during the process they can withdraw.*

### **Part 1: Demographic Information**

*Gender:*             Male             Female

*Age:*                 19-24             25- 29             30-34             35-39  
 40-45             46-50             51-55             56-60  
 61-65

*Education:*             Secondary             Post Secondary             Graduate

*Employment:*             Full-time             Part-time (auxiliary)  
 Professional             Administrative Support

*Years of Service:*  
 0-5                 6-10                 11-15                 16-20  
 21-25                 26-30

**Part 2: Organisational Structure**

1. What are some of the future key challenges your organisation faces?\_\_\_\_\_

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2. Can you describe how your organisation's vision statement was developed? \_\_\_\_\_

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3. Employees participated in the development process, could you describe what worked well and what did not work as effectively? \_\_\_\_\_

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4. Are there aspects of the development process that could have be improved and how would you have improved the process?\_\_\_\_\_

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**Part 3: Personal Mastery and Learning**

*I would like to shift the focus of our dialogue and spend time examining how opportunities for personal mastery and learning are created within your organisation.*

1. Can you describe how organisational and program decisions are made in your agency?\_\_\_\_\_

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2. Can you give examples of individuals being empowered to make decisions without having to consult with senior management?\_\_\_\_\_

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3. Can you describe the outcomes that were derived from those decisions were the outcomes positive or negative for the organisation?\_\_\_\_\_

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4. Given an opportunity, how would you improve your organisation's decision-making process?\_\_\_\_\_

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5. Learning often occurs from trial and error. Generally when individuals engage in a new task or activity their level of proficiency is minor and they have a high frequency of mistakes. Often it is by making mistakes, that individuals increase their competency and gain experience. Can you describe how mistakes are responded to in your organisation?\_\_\_\_\_

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6. How would you improve the agency's response? ?\_\_\_\_\_

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**Part 4: Team Learning**

*Having exposure to differing ideas, concepts and methodologies often enhances creativity and learning.*

1. Can you provide examples of cross-organizational team(s) being developed to work on an organisational issue\_\_\_\_\_

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2. Can you describe aspects of the team(s) that worked well?\_\_\_\_\_

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3. Can you describe aspects of the team(s) that did not work well? \_\_\_\_\_

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4. If cross-organisational teams are created in the future how you would improve the team's effectiveness? \_\_\_\_\_

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5. Could you describe the most invaluable experience that you have witnessed and/or shared from working on a team? \_\_\_\_\_

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**Part 5: Mental Models**

*Individuals have varying mental models of the function and structure of organisations and social institutions “images, assumptions, and stories our “mental models” determine not only how we make sense of the world, but how we take action” (Senge, 1990, p.175).*

1. Can you describe practices and beliefs in your organization that are never criticized or questioned? \_\_\_\_\_

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2. Why do you think individuals are reluctant to question or criticize those practices and beliefs? \_\_\_\_\_
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- \_\_\_\_\_
- \_\_\_\_\_
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- \_\_\_\_\_
3. How would you improve the environment to enable individuals to voice opinions that might be viewed as dissenting from the norm? \_\_\_\_\_
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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Thank you for participating in the research project.

## APPENDIX 4: Participant Consent Form

### *Participant Consent Form*

UNIVERSITY OF VICTORIA  
**OFFICE OF THE VICE-PRESIDENT, RESEARCH**  
*HUMAN RESEARCH ETHICS COMMITTEE*

Date:

Dear:

You are being invited to participate in a study entitled ***Has the Child and Family Counselling Association transformed into a Public Service Learning Organisation?*** that is being conducted by Renaa Bacy a graduate student in the School of Public Administration at the University of Victoria. You may contact her by telephone at 519-1007 (home) or 387-3495 (work) if, after having read this correspondence you have further questions and/or require additional information.

As a graduate student, I am required to conduct research as part of the requirements for a degree in Public Administration. It is being conducted under the supervision of Bart Cunningham You may contact Professor Cunningham 250 721-8059.

The purpose of the research is to identify and recommend strategies to assist senior management in developing competencies to enhance the agency's ability to continuously learn. The objectives of the project are to determine if the Child and Family Counselling Association is a learning organisation, to identify programs within the organisation that have adapted learning organisation disciplines and to recommend strategies for integrating learning organisation disciplines throughout the agency.

The research is important because the majority of British Columbia's public service agencies are experiencing significant budgetary and staff reductions, embedded in these reductions is the depletion of organisation's human and knowledge capital. If an organisation is to survive and remain competitive it is imperative that senior management focus attention on, improving the organisation's ability to continuously learn by building its capacity for creativity, critical thinking, risk- taking and decision-making.

You are being asked to participate in this study because you are an employee of the Child and Family Counselling Association and were randomly selected out of a population of twenty-eight potential participants.

If you agree to voluntarily participate in this research, your participation will include being involved in a face to face interview with the principal investigator or if you would prefer, completing an electronic self-report questionnaire. Participation in this study may cause some inconvenience to you, primary a time commitment of one to two hours.

There are no known or anticipated risks to you by participating in this research. The potential benefits of your participation in this research is having an opportunity to become familiar with a new organisational construct and potentially having an impact on the future direction of the Child and Family Counselling Association. In addition, this research will provide senior management with an opportunity to understand the perceptions that employees have of the organisation and its leadership.

**Your participation in this research must be completely voluntary.** If you do decide to participate, you may withdraw at any time without receiving consequences or providing an explanation. If you do withdraw from the study you will be asked in writing to authorize that the information that you provided may be used in the study.

In terms of protecting your anonymity only the principal investigator and her academic supervisor will have access to the raw identifying research materials. All information will be summarized and presented in aggregate so as not to associate identifying information.

Your confidentiality and the confidentiality of the data will be protected because all data collected will remain in the possession of the principal investigator for six months following the dissemination of the approved report. After six months the raw data collected and any earlier draft reports will be shredded.

It is anticipated that the results of this study will be shared with others in the following ways: a report on the project will be presented during the principal investigator's graduate academic defense. Following the graduate academic defense, a presentation will be made to the Child and Family Counselling Association Board of Directors.

In addition to being able to contact the researcher and, the supervisor at the above phone numbers, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Associate Vice-President, Research at the University of Victoria (250-472-4362).

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers.

*Name of Participant*

*Signature*

*Date*

***A copy of this consent will be left with you, and the researcher will take a copy.***

## APPENDIX 5: Summary of Questionnaire

### Organisational Structure

Interview Question	Participants' Responses	Commonalities Across Participants
Future key challenges your organisation faces	<ul style="list-style-type: none"> <li>• Providing services with limited staff and maintaining staff – their mental well being</li> <li>• Funding</li> <li>• Bureaucratic shifting of system</li> <li>• Political change</li> <li>• Accreditation-paperwork</li> <li>• Communication</li> <li>• Increasing diversity-mix up our gene pool here at CAFCA</li> <li>• Leadership</li> <li>• Low morale</li> <li>• Legislative mechanisms</li> <li>• Fear of change</li> <li>• Identify the opportunities and satisfy them in the market place</li> </ul>	<ul style="list-style-type: none"> <li>• Accreditation</li> <li>• Paper work</li> <li>• Funding</li> <li>• Communication</li> <li>• Leadership</li> <li>• Change</li> </ul>
Describe how the vision statement was developed	<ul style="list-style-type: none"> <li>• Initially it was imposed</li> <li>• Collaborative approach</li> <li>• Everybody brainstormed and listened to everybody else</li> <li>• Was not involved</li> <li>• Bottom up-staff developed</li> <li>• The innovators came</li> <li>• Everybody was invited to participate</li> <li>• I'm not sure I've seen the final one but it was put out to the staff to come up with, mine was far too long, but it has to do with, you know, it has to do with connecting</li> </ul>	<ul style="list-style-type: none"> <li>• Participatory approach</li> </ul>
Employees involved in development process, what worked well and what did not work as effectively	<ul style="list-style-type: none"> <li>• Was not there to witness it</li> <li>• Did not participate</li> <li>• The agency really promotes people that are able to be creative</li> </ul>	<ul style="list-style-type: none"> <li>• The majority of respondents did not participate in process as it was not mandatory</li> </ul>
Aspects of the process that could be improved and how to improve	<ul style="list-style-type: none"> <li>• Get the quiet people involved</li> </ul>	<ul style="list-style-type: none"> <li>• The majority of respondents did not participate in the strategic planning session and were unable to provide a response</li> </ul>

## Personal Mastery and Learning

Interview Question	Participants' Responses	Commonalities Across Participants
Describe how decisions are made	<ul style="list-style-type: none"> <li>• Through consultation with David</li> <li>• Decisions are made at peer support</li> <li>• The core group of movers and shakers make decisions</li> <li>• Continuous Quality Improvement Committee</li> <li>• Collaborative approach</li> <li>• Participative approach</li> <li>• Trust us within the community to do our work and to do it well</li> <li>• We're trusted to do our job</li> <li>• I'm left alone to make my decisions on a day-to-day basis</li> <li>• CAFCA and that organisation give the staff the pretty much full reign you know to do what they need to do</li> <li>• He just gives me a lot of freedom to work the way I need to work so long as I check with him</li> <li>• Decisions are made from the bottom up</li> <li>• I think David is very concerned about CAFCA's image and so I think he really wants to know what you say, who you are saying it to</li> <li>• When situations are critical I always call David and let him know what I am about to do.</li> </ul>	
Examples of individuals making decisions without consulting with management	<ul style="list-style-type: none"> <li>• Discussing operational issue with supervisor funding body without first discussing with executive director</li> <li>• Organising a team day and finding replacement staff coverage</li> <li>• I have situations that are fairly critical and I need to bypass to a certain extent social workers or individuals on my way to get an answer somewhere</li> <li>• Team developed its own policy</li> </ul>	
Describe outcomes that were derived from those decisions positive and negative.	<ul style="list-style-type: none"> <li>• A meeting was arranged to discuss the problems</li> <li>• Positive team day, felt disappointed in initial response from executive director</li> <li>• Had to write a letter of apology</li> </ul>	

Interview Question	Participants' Responses	Commonalities Across Participants
Improving organisational decision-making.	<ul style="list-style-type: none"> <li>• Getting the quiet people involved</li> <li>• Better communication</li> <li>• I don't know how you'd improve it or change it but I think people have different comfort levels in which to sort of participate in making organisational change</li> </ul>	
Describe how mistakes are responded to.	<ul style="list-style-type: none"> <li>• Don't have to worry about being fired</li> <li>• David communicates directly with the person</li> <li>• If you make a mistake that's okay your all learning</li> <li>• They're not going to jump down your throat</li> <li>• A lot of us are covering the supervised visits right now if you miss a team like a CAFCA meeting once a month there's this some of them are mandatory. If you miss one rather than getting a call from, David or from Elaine or somebody just saying oh we didn't see you at the meeting, you get a letter and it gets cc'd to your file and it's got that</li> <li>• The more that you can let him know and be up front with things the better he is going to react to the situation</li> <li>• Environment is supportive of mistakes</li> </ul>	

<b>Interview Question</b>	<b>Participants' Responses</b>	<b>Commonalities Across Participants</b>
Describe how mistakes are responded to.	<ul style="list-style-type: none"> <li>• David he makes his mistakes sometimes he can be an absolutely idiot but he's it's not very often that he screws up you he's big enough to take, you know, to take ownership of this stuff</li> <li>• I've done a few things and David had handled them pretty decently with me</li> <li>• I think David is quite diligent about the transparency issues. Like sometimes I'll tell him I've made a mistake and I'm hoping it's going to be confidential and he's like it has to be transparent</li> <li>• If something really serious has happened he will tell people to bring their steward with them</li> <li>• Sometimes people are feeling troubled because of things they have done out in the field or said things or whatever have denied it and that's when things get a little touchy around here</li> </ul>	<ul style="list-style-type: none"> <li>• Mistakes are used as learning experiences</li> <li>• Must be honest</li> <li>• Individuals are not punished for making mistakes</li> <li>• Executive Director displays humanistic approach to mistakes-they are used as learning</li> </ul>

## **Team Learning**

<b>Interview Question</b>	<b>Participants Responses</b>
Provide examples of cross-organisational teams working on an issue?	<ul style="list-style-type: none"> <li>• Strategic planning committee- working on the mission and vision statement</li> <li>• Does not occur</li> <li>• Teams are isolated</li> <li>• Development of the Autism Program</li> <li>• Cross-organisational teams do not exist</li> <li>• Staff meeting- are not mandatory</li> <li>• Facilitators meetings, not sure what they do</li> <li>• We used to be more issue driven more clinical driven before accreditation</li> </ul>
Aspects of the team(s) that worked well.	<ul style="list-style-type: none"> <li>• Did not participate in strategic planning</li> <li>• The long-term standing, the relationship</li> <li>• Trust</li> </ul>
Aspects of the team that did not work well.	<ul style="list-style-type: none"> <li>• Constant state of change</li> <li>• Discontent within the team</li> <li>• Low morale</li> <li>• Lack of trust</li> <li>• Personality conflicts</li> <li>• Tensions are so high things that would have normally just rolled off your back are not now</li> <li>• We came up with solutions but never acted on our solutions because each one of our solutions we thought had a consequence that weren't too sure.</li> <li>• Didn't have somebody with leadership quality around it</li> <li>• I'm not so sure I'm going to be supported by management</li> <li>• Not really a team player a bit of a lone wolf</li> <li>• There's a general feeling of discontent from the team</li> </ul>

Interview Question	Participants Responses
<p>If teams were created in the future how would you improve effectiveness?</p>	<ul style="list-style-type: none"> <li>• It would be neat to get to know the other people in the organisation</li> <li>• Have an organisational day</li> <li>• Specialty within the fields</li> <li>• Have members from each program area</li> <li>• We need to build more friendliness or more like, more connection on a personal level</li> <li>• I would have like one that each of us rotate a new concept or a new, a new um like you know we do presentations of our clients</li> <li>• You know um like a new piece of helpful information for our work with our clients. Here is a great book; I read this great book I' m going to present it to you. To educate each other about something</li> <li>• So that rep from that team that month could go to that larger meeting and then it rotates, it's not always the same person. And everyone shares that and you bring it all back to the team from six other concepts</li> <li>• I think to do things in small groups is really the way to go here</li> <li>• Because it's terrible, I know hardly anybody. Like I kind of know them and sometimes I meet them and I don't even know their names.</li> </ul>
<p>The most invaluable experience from working on a team.</p>	<ul style="list-style-type: none"> <li>• I want to know that I can count on you if you're on my team.</li> <li>• David involved in supporting Aboriginal organisations and with their competitors.</li> <li>• Knowing it's a very supportive environment to work in.</li> <li>• Feeling respected, valued and heard.</li> <li>• Filling in for David.</li> <li>• I really value my I guess time, therapeutic time spent on team.</li> <li>• I think that was the most helpful because it really showed I think us to go through our fear – we had to walk to talk.</li> <li>• I've learned stuff, I've learned more of this human stuff.</li> <li>• Touchy, feely stuff from the people here.</li> <li>• B. brought to the team a very special perspective certainly his perspective I valued probably the most in terms of the team.</li> </ul>

## Mental Models

<b>Interview Question</b>	<b>Participants Responses</b>
Describe practices that are never criticized or questioned.	<ul style="list-style-type: none"> <li>• Everything can be questioned</li> <li>• Transparency</li> <li>• From my experience I don't have that stuff</li> <li>• David's partial management style where he supports you and then it gets kind of switched around</li> <li>• Mandatory training sessions</li> <li>• Decisions are made collaboratively with a limited number of people again and then are presented as a done deal</li> </ul>
Why are individuals reluctant to question or criticize.	<ul style="list-style-type: none"> <li>• It's the own individual choice</li> <li>• Sometimes it's okay and sometimes it's not</li> <li>• A lack of trust</li> </ul>
How would you improve the environment so opinions dissenting from the norm are expressed.	<ul style="list-style-type: none"> <li>• I've never felt that, like suppressed from expressing my opinion</li> <li>• Everything that happens around here is open</li> <li>• A survey to give feedback about how they think their work and how they think CAFCA as an organisation is operating</li> <li>• Allow all the teams to come together either as whole or within their own teams write up letters, so that management just gets the real flavour of how staff is feeling</li> <li>• By doing activities that release the mind in a different direction</li> </ul>