

Editor's note: At first thought, the idea that in Ireland and Irish experience one could find a process that stimulates innovation. cooperative learning and change might seem a bit far fetched. The popular view of Ireland seems to be nostalgia for a golden past, a love for its wonderful songs and poets, or fright at the seemingly cruel violence that takes away from the first two views.

Think again. Tom Lyons has constructed and proven a highly rational and pragmatic method for achieving effective large scale change. A special word is needed here so the reader will appreciate that this large scale change does not mean several hundred or several thousand people in one organization. *Shared Learning* Mr. Lyons' approach to change, has facilitated effective simultaneous change processes in one case for ten communities (30,000) people and in another case for ten different private and public organizations. This is large scale change of a quantum scale.

A change process which can successfully facilitate a process wherein ten organizations from the North and South of Ireland simultaneously work together to introduce employee participation in one case and bring together ten economically depressed communities to simultaneously develop plans to improve the economic viability of their communities and to challenge and learn from each other in another case is not just a strong process

Success at facilitating large scale change that stimulates innovation, cooperative learning and change is laudable: achieving it in very difficult and tension filled environments has proven to me that it is perhaps the most robust and adaptable change process yet developed. Ireland and the European Union may be the first beneficiaries of its effectiveness and adaptability but I expect that before we all see the end of the next decade, 2010, it will have revolutionized change and modernization processes throughout the developed and developing world.

A robust process for systemic learning, innovation and change...

Shared Learning

Tom Lyons  The Irish Productivity Centre

After Atlantis...

In an age filled with rapid political, social and technical change, the time-honored, sure and steady approaches to working, managing and leading seem to be as out of place as a steam locomotive and its attendant crafts would be at a 1990s industrial trade show. No apparent amount or speed of change however has relieved us of the need for effectiveness and rigor in the processes and methods we use to facilitate the forming and reforming of our enterprises or our work.

Shared Learnings a structured method for developing and implementing specific system wide change within timeframe and resource limits set by the participants. Its effectiveness and rigor have been proved out under the harshest of conditions and within a variety of difficult settings.

After more than a decade of evolution and success in its application it can now be said that in *Shared Learning* we have a very robust process which can support effective change and transformation in a wide variety of whole systems and settings.

Shared Learning can and has facilitated effective change and transformation in:

- Single organizations (for profit and not-for-profit) which had decided that the union and management needed to find new ways of working together for mutual benefit.
- A network of ten different public and private enterprises in the North and South of Ireland which set out simultaneously to improve their performance through the introduction of critical changes based on a variety of employee participation processes.
- Twelve communities on the island of Ireland, not including Northern Ireland, all of which wanted to substantially advance their local economic development capacity and success in a coherent and integrated manner.
- Organizations which desired to improve performance and decision making within multiple divisions or with multiple unions.

A multi-organizational Shared Learning process — The rigor of *Shared Learning* at this present stage of its evolution is demonstrated by the following project results (achieved within a strict March, 1985/March, 1987 project time frame). Within a nine organizations, ¹ two year program, some 30 change initiatives were introduced or barriers to change removed. The initiatives shown are not in any order of priority, occurrence or importance. Each however was concerned with a sensitive issue within the particular organization in which it was introduced. The initiatives included:

Participating organizations in multi-organizational process...

Telecom Eireann.....	Northern Ireland Electricity Service
(telecommunications)	(electricity generation and distribution)
Irish Gas.....	Northern Ireland Housing Executive
(natural gas sales	(public sector housing; building
& distribution)	& maintenance)
National Physical Planning	Ulster Museum (preservation & display of
Research Institute (research)	antiquities)
Waterford Crystal.....	Rothmans (NI) Ltd.
(crystal glass manufacturers)	(cigarette manufacturers:had to leave
	mid-project)
Virginia Milk Products	Sir Richard Arkwright (textiles – spinning)
(milk processing)	
Ten independent organizations — employing <u>30,000</u> people	

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- The introduction of a training and development policy and job appraisal scheme.
- The establishment of agreed principles for the development of draft joint technology agreement.
- The design, processing and feedback of company-wide attitude survey.
- The development and commencement of a five-year flexibility training program.
- The introduction and establishment of cross-department project team working.
- The introduction of customer service teams on a pilot basis.
- The achievement of 100 percent employee adherence to healthcare regulations on hearing protection.
- The introduction of job preservation/creation — an intrapreneurship initiative.

The *Integrated Rural Development* project (time frame: Oct. 4, 1988–Oct. 5, 1990) — Although many of the *Integrated Rural Development* projects, as of October, 1990, were still in the early stages, those reported on had led to the creation of 225 full-time jobs. These projects further targeted a potential employment of 600 full-time jobs, 687 part-time jobs and 1,500 short-term seasonal jobs. Altogether, this amounted to about 5 percent of the working population of the areas.

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Many of the projects undertaken generated additional or supplementary incomes for people. Within the pilot phase, additional income amounted to \$1,000,000 per annum.

The potential incomes for projects underway amount to \$8,700,000 per annum (this figure leaves out the potential results of quite a large number of projects where the impact was not quantified). In the perspective of individuals, this would mean that \$8.7 million would provide say \$8,750 per capita for 980 people. For people in the pilot areas such as small farmers, fishermen or others with mainly seasonal or part-time employment and relatively low incomes, such sums could be sufficient to make the difference between involuntary emigration and reasonably acceptable living standards for perhaps 2 ½ to 4 percent of the working population.

We are now achieving similar results in a number of private, company stand alone applications and with organizations dealing with multiple union partners within the same multi-site organization.

The *Shared Learning* process is not, of course, the miraculous result of a single planning and design session. The maturity and rigor it now has is based upon more than a decade's work with and input of hundreds of participants, as well as the dedication and insight of colleagues and advisors from Ireland, the UK, the European Union, North America and Scandinavia. [2]

An understanding of our learning path about how to both speed up and enhance the effectiveness of organizational transformation will help you, I believe, understand that with this process you can now approach whole system change with a great deal more confidence. My personal learning path began in my grandmother's kitchen.

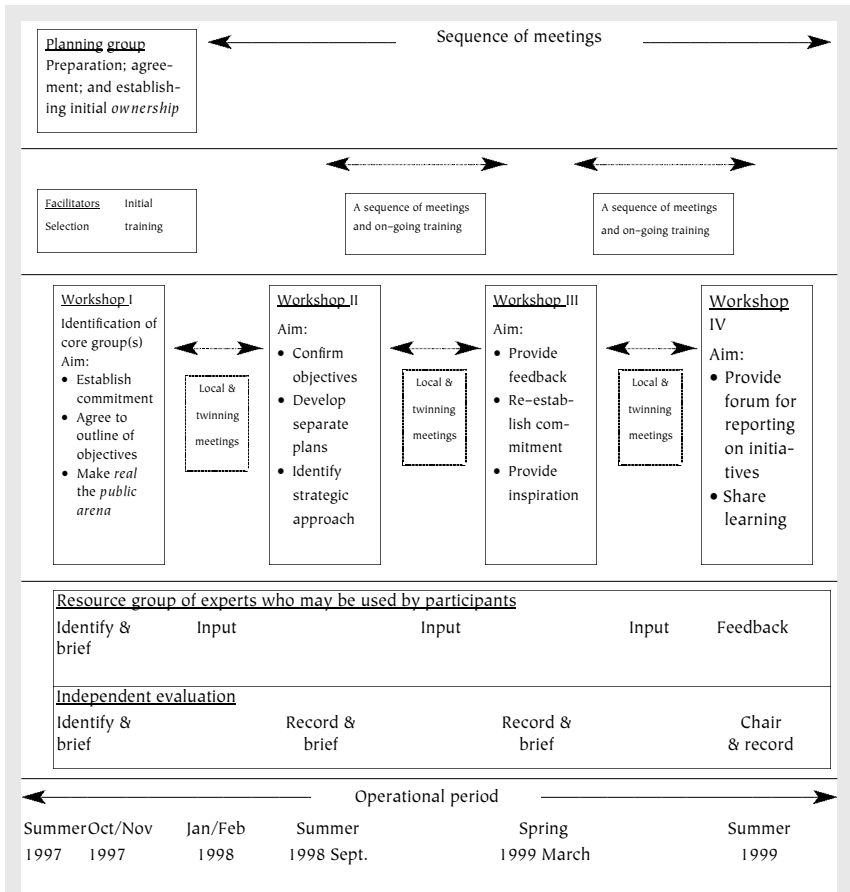
The evolution of *Shared Learning*

As often as not our learning comes from the (sometimes simultaneous) discovery that:

- What seems to be a very complex situation or problem has a relatively simple answer...
- What seemed to very simple and straight forward at the beginning, turns out to need a fairly complex approach.

Let's consider some examples, and on the way you'll see the how, what and why of this approach to change called *Shared Learning* and why it works and sticks.

The design of a typical *Shared Learning* process...



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"I'll learn you..." For more generations than most could remember, when an organization, community or society discovered a problem or lack that needed changing, the approach was to suggest: "Let's try a number of different approaches on a small scale, then select the best one and tell everyone to copy that one!"

Too often, much too often, this type of pilot or model project is not only thought to be a safe and less costly way to solve a problem or to introduce change but we convince ourselves as well that surely it will apply to the whole system.

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The answer, so the pilot idea goes, is then so obvious that all anyone need do is to copy the model and apply it everywhere in the same manner and achieve the same results.

This reminds me of my first steps in my journey to understanding something of learning and effective change. My first lesson was in my Grandmother's kitchen. Although she loved me dearly, I was quite clear on the point that it was still wise to keep the large country kitchen table between the two of us when my actions led her to say, "If I get close to you young man, I'll learn you." Her intentions were kindly, to be sure, but her intended method of *learning me her right way* was one that I resisted. At the very least, I wanted to have some say in learning what was best for me. And even then I knew from sometimes *hand-me-down* trousers and sweaters that clearly: one size doesn't fit all.

Over the years, my Grandmother's unintended lesson reminded me that there is seldom one right way or that having someone "*learn you*" would produce anything other than a great deal of resistance or avoidance.

Much later, in the 1970s, while working with my colleagues, mentors and the late Professor Keith Thurley (London School of Economics) and Dr. Hans Wirdeus of F. A. Radet on *The Future Role and Development of Supervision in the UK, Sweden and Ireland* and kitchen table-based knowledge came into sharp focus.

The future role and development of supervision in the United Kingdom, Sweden and Ireland Initiative This initiative called for sending teams of international experts in supervision into seven different types of factories with parent firms from the US, Germany, France, Sweden, Japan and Ireland) to carry out in one week a diagnosis of existing supervisory practices.

During this brief study, it became clear that:

- Standardized recommendations or prescriptions would just not do the job — recommendations tailor-made for each firm would be required.
- Traditional training solutions for individuals would not do the job — there was a need to make overall organizational changes.
- There was a need to redesign the supervisory role and a general upgrading of the role.

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- Decisions should be decentralized to give supervisory management systems greater control and autonomy.
- A technical improvement role would have to be developed for supervisors.
- A systematic analysis of the supervisory role (in each company) was needed as the basis for radical restructuring of the role and that such a restructuring could only take place within an *overall* change process.

One case within this initiative, in particular, demonstrated to me the value of *shared* learning. A diagnosing group dominated by French experts visited a German owned and managed firm doing business in Ireland. The French *dominated* team gave the German manager what can only be described as a very frank assessment and a radical set of recommendations to overcome *his* above average absenteeism and labor turnover in the face of the then 17% unemployment in the community. Three years later, this German chief executive came back to the organizers of the initiative and told us that the “French intervention” was the most valuable lesson he had ever experienced in his business experience.

Later, after the initiative had been concluded, while we were sharing experiences about the design of training programs for mid-level personnel (including supervisors), my memory of the role of the kitchen table led us to see that:

“It’s not all about trainers training, it’s more about learners learning.”

Who owns the change or learning? My Grandmother’s failure to *learn me* whatever she had in mind from the other side of the table stood out for me as an ownership issue. Her *learn me* intention was to pass to me some understanding of a particular danger into which she was determined I should not fall. The kindly intent was to separate danger and learning. The result, of course, would be that I could only apply her learning as if it were a narrowly designed rule — it would do me little good in situations not covered by her learning.

My additional learning from this line of thought and experience was that even though it might be impossible to include everyone in the system in a single learning event or experience, you should include as many people as is possible who are, either formally or informally, leaders or people with respected influence.

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The *danger of leaving out relevant decision makers* needs to be faced during the design stage. The key is to involve a large enough and complete enough (representative) slice of the total system and to thus avoid the risk of seeing the initiative sidelined or bypassed later as a real means of transforming the system.

The role of experts. If it's about *learners learning* and we know that learners closely watch *how feet move relative to lips*, then the use of experts during learning has to be consistent with the concept of *learners learning*. It is not the need for experts that is at issue (as this need is nearly always clear: the issue is the role and profile of experts within the learning, problem solving, or innovation process. An expert may have a key role, but in many cases should not have high visibility or authority within the process. The focus on the needs of *learners learning* led us pay careful attention to being consistent with that principle throughout any learning or change process, lest we fall back in to the *we'll learn you* mode of training.

In a current case in the computer industry, the profile of the *Shared Learning* facilitator's role is being kept low so as not to lessen the importance/legitimacy of members of the joint steering group for partnership (labor and management). All preparatory work for the partnership has been *off site*, so as to not take away from the profile of the *on site* joint steering group.

Which is more effective: learning with folks just like us, or learning with strangers? During a participative learning event, *The Future Role and Development of Supervision in the UK, Sweden and Ireland*, we observed how the sharing of distinctly different aspirations and experiences, had not only created a synergy between participants: their dissimilarities instead of hindering the learning process had in fact enhanced their ability to focus on processes and the organization of such processes (the governance or political aspects of organization) rather than to talk past each other by focusing on the specifics of their different companies and countries.

While this experience taught us much about how learners can better learn together, it also demonstrated to us that while one event or one week led to some significant learning, it was not enough contact time between groups to lead to significant impact in each workplace.

A change in career focus (from researching and restructuring supervisory roles to designing and supporting employee involvement and participative change processes) gave me the opportunity to examine how these actual experiences might be applied to helping organizations

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design and implement large scale change processes. I wondered if the insight of *it's about learners learning* and the learning which flowed from that could:

- Make the learning about and implementation of partnerships for change processes more effective...
- Hasten both the dissemination of knowledge about participative processes and the diffusion of effective employee involvement processes.

This assignment and bias coupled with the knowledge that the European Economic Community (now the European Union) would be funding pilot application projects on participative change led me to opt for taking on several rigorously designed multi-organization change projects from the mid to late 1980s and onwards with the determination that they would pilot a *shared learning* process which focused on *learners learning* and not just another *one-right-way* to introduce workplace partnership into all organizations or systems.

What have we learned to date?

In a nutshell, both the multi-site projects and single site projects have taught us that effective organizational change had more to do with *POLITICS* than it did with attitudes and that the *HOW* to mobilize a number of people to bring about the desired change is equally important to *WHAT*, or the objective of the change. By *POLITICS* I mean:

- Who participates in the change or learning process...
- What rules are applied to interactions and decision making...
- What relationships are implemented.

Inside a workplace, or within a community of organizations learning together, it's not just a enhanced product *at the right price and at high quality* that determines success. The quality of the change process itself is judged by:

- Who participates in the process...
- What rules are applied to it...
- What relationships are implemented.

Critical design features of *Shared Learning*— Almost 12 years of practical experience with *Shared Learning* have taught me and my colleagues much about what works well and which design features are indispensable to an effective organizational learning process. The points below sum up these design and conceptual features. In the following sections, each will be further explained and illustrated with examples from successful applications of *Shared Learning*

1. Joint ownership of the change process must be acknowledged from the onset. This is demonstrated through the establishment of core groups of people (drawn from the distinct stakeholders/partners in the change process) who are capable of influencing all levels of the organization and will serve as the process leaders of the change process.
2. As early as possible and in every situation a formal joint statement (signed by the principle participants) about why and how the participants will work together toward a jointly chosen future must be developed and communicated widely. This will facilitate mobilizing the necessary numbers of people needed to become active in the development of solutions to problems and/or means to reach jointly held goals.
3. Agree upon a starting and ending date, transition phases and identify and allocate personnel, as well as budget on that basis.
4. Make the discomfort of travelling for crucial knowledge an important part of the learning design. Participants must demonstrate their commitment to the process and goals by physically and mentally travelling some distance to gain and share knowledge. Off-site meetings mean that all parties are working together on neutral turf. Additional statements about the learning process and its goals in conjunction with the formal joint statement demonstrate that participants have moved away (travelled) from traditional positions toward a different future.
5. Consciously create and provide for a number of *public arenas* within each working change process.

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6. Core groups are paired/twinned with unlike core groups (between whole system public arena meetings) to share experiences and learnings so as to enhance overall learning and working toward developing solutions to problems and/or establishing means to achieve goals.
7. *Enough trust* as distinct from absolute trust, must be maintained between the participants — the formal joint statement is the first demonstration of *enough trust*. Trust is earned/accorded as people work together toward agreed upon ends. It can be built/rebuilt as people work within the agreed upon process parameters or *rules of the game*.
8. High profile process leadership and interaction between key individuals of the joint steering group is critical for success.
9. The *HOW* of diffusing results, decisions and implementation should be an integral part of the process of change and should be carried out at the earliest possible time.
10. An estimate of what outcomes or rewards will accrue to the different participants/stakeholders in the overall change program should be made explicit within the identifiable cycles of feedback built into the actual change process.

Joint ownership of the change process must be acknowledged from the onset — A *Shared Learning* change process may begin with the insight, vision or request of a chief executive, a labor union, a group of managers within a single organization, a joint decision by some combination of those just mentioned, a government initiative or from a number organizations interested in implementing significant change to improve their economic sector or community. Regardless of where the impetus for change begins, it is imperative that everyone (all and any groups and individuals with interests in the outcome) impacted by the project feels that they have joint ownership of both the problem and the solution. Since it is not practical for all those who might be impacted by the project to participate in the process, legitimate representatives for the many different interests and interested groups must be selected to work together toward solving the identified problem or finding the means to achieve the common goal.

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The people who represent the key interest groups within the organization, or between organizations, must be seen as being capable of identifying the most sensitive issues, offering workable solutions to the problem or means to achieving the goals of the project and working together to carry out the change process.

Identifying both the key interest groups and who within them is capable of exercising legitimate influence throughout all levels of the organization is an essential first step toward a successful *Shared Learning* process. These groups and the people within them selected as an influential and capable individuals make up the decision making and ownership foundation for the process. Once identified they are grouped into what we refer to as core groups.

Using position titles as starting points for identifying individuals with influence to work on the project is just that, a starting point. In gathering together a vertical slice, you will look for someone from middle management and the shop floor who is seen by others as being both capable, influential and trustworthy. In short, individuals with formal (title) and informal (effective) influence and ability are sought out. as key participants in the joint process. Those who have seen important projects sidelined or derailed because one or two key informal leaders have not bought into the project, will, I am sure, appreciate the importance of including as many of those with effective influence and ability in the improvement or change process planning and design.

*Core groups...*A core group is most often made up of a vertical slice of the organization or system where change has been proposed:

- In a single site business, the core group would typically have in it a top level person, one level down from the chief executive, and a clear faction of people representing different interest groups from senior management, middle level, to shop floor and, as necessary, based upon white collar and blue collar union allegiances.
- If a multi-site organization is undertaking a *Shared Learning* process, the core groups for the whole process would be made up of core groups representing each of the site and possibly a core group from the headquarters operation.

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- In a multi-organizational *Shared Learning* process core groups, whose members would be selected as in the examples above, would take on leadership roles within their own organizations in pursuit of the jointly identified initiatives within their organization. In this type of process, individuals would be nominated by their different interest groups because of their recognized ability to influence their own workplace and their potential to introduce change.
- In a single or multi-community *Shared Learning* process each core group would consist of eight to ten individuals, reflecting a range of backgrounds, experience and competencies.

Core group members (volunteer activists) would also have to have a strong commitment to area improvement and a willingness to make the effort necessary to bring about such development.

A special note about single site, non-unionized firms. Some, at this point, may be thinking that core groups do not make sense in single site organizations without unions — think again. Most people experience their organization as their work group or perhaps their functional department. The people in accounting, assembly, sales, customer services, marketing, etc. all work and live in the world of their department's functional area of expertise and responsibility. To make matters worse, in a sense, the folks in accounts receivable work and live in a world that seems quite different from accounts payable. The value of using core groups drawn, at least, from different functional groups should now be clearer. As I discuss other critical aspects of *Shared Learning* keep the notion that we each work and live in somewhat separate worlds in mind and it should help you to see the value of using the *Shared Learning* process in a non-unionized, single site firm.

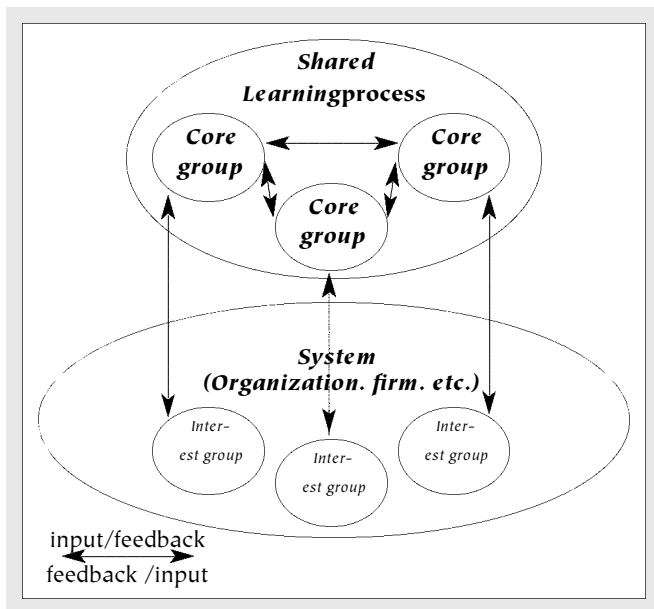
The challenge to organizations is to send out the first team, the competent ones, the ones that are not easily put forward as representatives, but the ones who, in fact, influence decision making. That is critical — absolutely critical — to the success of any Shared Learning initiative. These are the people who become the leading edge and human face of the change process on the ground and take responsibility for the operation of pilot programs or diffusion within their own areas.

Core groups gather up and diffuse information...

Core groups:

- Represent legitimate interests throughout the system...
- Exchange information and create new knowledge across the system...
- Act as a feedback mechanism to and from their interest group...
- Are vital in mobilizing additional people in the system to help shape both solutions and the change implementation process.

3



Members of these core groups should be seen as clearly able people with independent judgement. Individuals seen by others as yes men or perennial naysayers are not good candidates for core groups, regardless of their formal position.

At the heart of the first *Shared Learning* process there was a network of ten separate organizations. The creation of this network of mixed organizations, each of them intent on introducing change simultaneously, was crucial to success of the project. The data from this first application suggested that it was a very robust design and very effective in mobilizing participants toward creating new approaches to solving problems. The participative nature of the design, along with other key elements such as networking between companies, the joint decision to achieve results within set time and budget limits, proved most effective in creating a sense of ownership within an organization for its change process.

Mobilizing for organization-wide or system-wide action During the *Shared Learning* process devoted to rural economic development the depth and breadth of how core groups can mobilize people for action and change was clearly demonstrated. Core groups organized others to work with them. [3]

Collectively, over the twelve areas, core groups directly worked with over 70 sub-groups. Sub-groups were of two basic types: groups with a sectoral (or project focus) and groups with a focus on specific geographical districts. Once internal or local ownership is established, it is hugely valuable establishing both commitment to and momentum for the process and diffusion of its outputs.

A formal joint statement about the future should be developed and communicated widely

Agreement on process legitimacy must come early and is clearly essential to creating a critical mass for change out of the first mobilization of people for that change. An enabling statement or process charter will, as noted earlier, facilitate both a sense of ownership and commitment, as well as mobilizing the numbers of people needed to develop solutions to problems and/or means to reach jointly held goals. In the best examples a formal statement outlining the scope, intent and nature of the change program is developed and distributed widely by the key participants to groups who will be involved in or affected by the change process.

Why are such statements needed and useful? Progress toward a breakthrough to achieving a critical mass of people and action for change is about permanently adjusting the *power paradigm** within the organization or system, or at least adjusting it for the negotiated time period of the change program. Thus where there is a history of distrust or skepticism is high the perception of *process legitimacy* is of paramount importance. Even though workplace change processes may not closely resemble peace talks between nations to understand the importance of process legitimacy one need only recall the weeks and weeks of discussions between the US and the Vietnamese over the shape of the peace conference table, who would enter the room when

* Power paradigm: The who, what, where, when and how of decision making and allocating resources within an organization.

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and where they would sit in relation to each party to the negotiations. The most successful *Shared Learning* initiatives have been those which viewed their joint statements as representing the intensity of participation and extent of foreseen mobilization of resources and people for change.

Well constructed joint statements do not specify how the joint project will proceed on day-to-day issues, nor do they advocate co-management or co-representation as a means to alter established collective bargaining agreements or personnel systems in non-union firms. They should, however, provide for the possibility of working in partnership to cope proactively with ongoing or future change projects or challenges to the organization. From a well constructed enabling statement all parties should be able to discern a set of change program operating principles, the spirit of the joint intent and key practices/behaviors by those participating in the process. Participants should be encouraged to view the enabling statement as being a *permanent draft statement in terms of* specifics (not principles). This will allow participants to update and/or amend it as needs be in the light of actual working experience.

Over the years, these consensus building joint statements have had titles such as:

- *Joint Statement on Participation*
- *Enabling Statement (toward bringing about a radical change in shopfloor relationships)*
- *Compact on Constructive Participation and Requisite Arrangements*
- *Context for Integrated Rural Development*

Agree upon a starting and ending date, transition phases, and identify and allocate personnel, as well as budget on that basis

Setting limits to project work (and project group activity) facilitates rather than hinders the emergence of genuinely collaborative arrangements in the pursuit of substantively important goals. Demonstrating process rigor and discipline in times of scarce resources and mounting pressures for results helps to assure support for the process and adds to the probability of its success.

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Jointly set limits has one additional advantage: it is tons easier to get a chief executive of a firm, a union, a town or a unit of government to commit a set amount of time and funds for a project. In short, people will commit because they are not signing up for life and because the process recognizes where participation *stops* and negotiation *begins*. Executives may well realize that change is permanent, but establishing limits around specific changes assure everyone that something will actually get done — on time and within budget.

Shared Learning supports the creation of an event culture. By this I mean it is a problem-led participation process, based upon an agreement by all parties concerned to adopt the project disciplines, parameters and decision making process for a specific setting and a fixed time frame only. This limit or restriction actually frees participants to enter fully into collaboration or partnership without having to contract to a new way of forever working together in advance of any actual experience. The strength and acceptability of the process once established, however, is perhaps best demonstrated by the fact that new change initiatives are still being introduced today (years after the end of the formal *Shared Learning* change process). Experience, in short, creates *enough trust* to take on new initiatives based upon explicit expectations surrounding time, resources and consistent collaborative decision making processes.

Not a day longer and not a penny more is the largest initiative undertaken to date (the *Integrated Rural Development* pilot project for Europe) we agreed to and adhered to a 2 year time limit and a budget of IR£1.5 million to establish an effective process within twelve sub-regional areas with 125,000 total residents. Our slogan “not a day longer and not a penny more” proved very useful and helped put in place a very business-like set of approaches which delivered most impressive results. Likewise in other situations, resource allocations dedicated to achieving results such as, promulgation, transition and diffusion are totally appropriate — nothing inappropriate is likely to occur simply because participants are under pressure to achieve results.

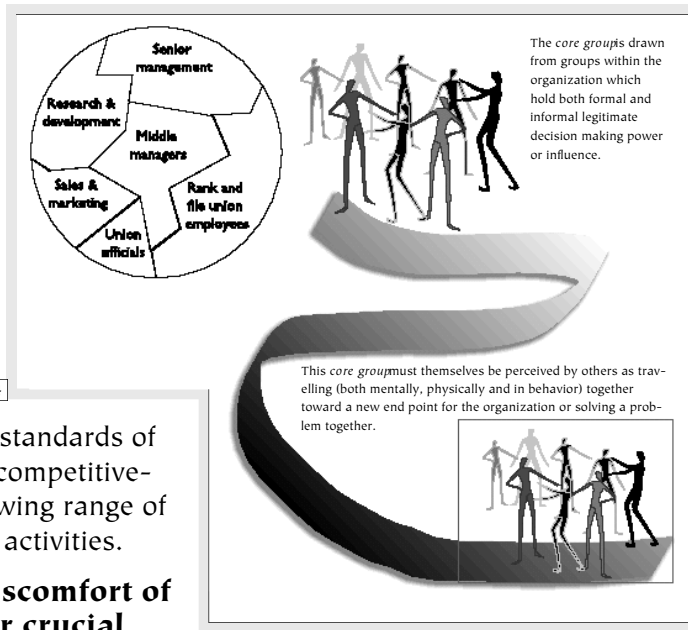
When significant financial resources are needed to support public sector culture change, they will be assembled under the authority of the appropriate governmental body. The government and participants will begin the change proposals designed to help the organization reach

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Mobilizing a critical mass for change and travelling to a *new* place...

Mobilization... Early mobilization around working together to solve a problem or to create change is important in tilting the balance toward taking a *political* approach to underpinning the decision to change rather than trying to achieve widespread individual psychological (attitudinal) shifts.

Travelling... Key groups must be seen to leave behind any complacency about maintaining the status quo and must reach out together for crucial learning about both the what and how of continuous improvement.



and maintain standards of international competitiveness on a growing range of core business activities.

Make the discomfort of travelling for crucial knowledge an important part of the learning design

Mobilizing numbers of people for joint problem solving needs to be seen and treated as *business-like* as any other major initiative of the organization. In a number of organizations, failed change processes have been treated as if they were *like-business*. That is, a senior executive might open up an off-site meeting with a few words of encouragement and then return to his or her office for his or her *real work*.

Travelling... Key groups must be seen to leave behind any complacency about maintaining the status quo and must reach out together for crucial learning about both the what and how of continuous organizational improvement. The facilitators of the process must also be seen as risk takers in creating new learning experiences for those actually in and leading the change process. 4

In multi-site programs. In multi-site programs, this means bringing the best available learning experience to a common (neutral) place where all the key persons from all of the participating companies/sites can hear and discuss the experience together.

In single site/company initiatives In single site/company initiatives it can mean bringing the leaders of the change group from their home base to the location of the best and most relevant experience within or outside the region or country or even further afield as appropriate.

Travelling, as in conceptually accepting discomfort while identifying and absorbing valuable learning, is important for a balanced group from each setting. Determining what is crucial — *good to be pursued and bad to be avoided* — is the challenge to good facilitation. Additionally, the facilitator's challenge is to secure sufficient commitment to get the body of people to do things together and succeed while at the same time provide training as needed and/or requested as an important support mechanism once some changes have been introduced.

Consciously create and provide for a number of public arenas within each working change process

Creating and maintaining public arenas for the use of all participating interest groups builds in a necessary transparency within the process of change. Here are a few arena maintenance principles which will help to maintain the integrity of the joint process:

1. All issues remain public (open to all parties).
2. Resource persons operate only on the public stage.
3. Analysis and decisions are built only on what emerges in public proceedings.
4. In the absence of a public arena: agreement, consultation and negotiation arenas can easily become confused.

Items and topics which should be aired in the public arena include:

- The development and sharing of agreed objectives for change...
- The production of flexible plans to underpin the change...
- The monitoring and sharing of the successes and failures experienced...
- For assessing (evaluating) and reporting on the changes introduced and the process initiatives undertaken...
- Issues remain public, i.e., are shared only between the participating core groups...

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- Resource persons operate only on the public stage, i.e., are not available for private consultancies...
- Analysis and decisions are built only on what emerges in public proceedings, i.e., people can only share and give acknowledgement to change which has actually been introduced. Talking about what might have been achieved doesn't cut much ice...
- Exchange ideas...
- Report on experiences...
- Inspire and motivate those involved through contact with the examples and achievements of others (both from within and outside Ireland).

Public workshops..Crucial to the success of any *Shared Learning* process are workshops, which in the Integrated Rural Development case were held over the two year period. These workshops are used to create the public arena, to share experiences and to acquire training relevant, and requested by the participants, for the specific *Shared Learning* project.

Workshop structure. Each workshop of the Integrated Rural Development program was attended by all core groups, core group coordinators and the planning team. The agenda for each varied as the program proceeded but the general intention was to:

- Exchange ideas
- Report on experiences
- Inspire and motivate those involved through contact with the examples and achievements of others (both from within and outside Ireland).

The timing and agendas for the workshops were designed to:

- Set an ambitious pace for achieving results
- Communicate a work ethic and seriousness of purpose
- Provide a forum for demonstration of results achieved and difficulties or obstacles overcome.

The importance of the workshops Scheduled workshop activity for the whole of the core groups is a most important networking activity. The workshops play a huge role in shifting both individual and group

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thinking and behaviors toward the jointly desired change and future. The end result is that the workshops functionally set standards for groups to compare with their own experiences and accomplishments.

During the first *Shared Learning* project (organizations all introducing participative work processes within their organizations) the design called for all core groups attending four strategically timed workshops during the two year period.

Each workshop went on for 2 ½ days, originally called workshops they were colloquially known as *sweatshop* because people have to work for their change and were sharing their experiences (warts, as well as beauty marks) with all of the other core groups. Three of them took place during the first half of the project. The third falling on the birthday of the first workshop. And the fourth came at the end of the two year period. The workshop timing was tied to this reasoning:

Going into something new or dangerous, you need support at the beginning — as much of it as you can get — and to know that you have a place to go where there are others who are suffering the same kind of loneliness.

Workshops in any type of *Shared Learning* application conform to the principles associated with maintaining a public arena:

- Issues remain public, i.e., are shared only between the participating core groups
- Resource persons operate only on the public stage, i.e., are not available for private consultancies
- Analysis and decisions are built only on what emerges in public proceedings, i.e., people can only share and give acknowledgement to change which has actually been introduced. Talking about what might have been achieved doesn't cut much ice

Core groups are paired/twinned with unlike groups to enhance overall learning

My first notion that *Shared Learning* was a distinct and advantageous manner of learning, came as I noted earlier, when we saw the leap in terms of depth and application of learning that came when outside groups or strangers asked questions of each other.* Asking naive and/or *non-comfort zone* questions not only enabled people to focus on

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how key decision making processes and structures could either advance or retard change, it also meant that individuals and groups would be questioned about things they no longer asked about, but perhaps should have been. In other words, it drove people to look at themselves in a new light and assisted in the search for innovative answers or solutions.

In the first *Shared Learning* program, we established five sets of *twinned* organizations (in both the Republic of Ireland and in Northern Ireland) to facilitate networking across sectors, between public and private sectors and also between various industries. Pairing unlike organizations together was important, because in this way they could support contacts and really focus together on the human dimension of the change process; which was the one thing they really had in common. If we had twinned one electric utility with another electric utility, they would very quickly find a level of comfort together, about the cost of crude oil, or coal, or the price per kilowatt; and this would have prevented them from making progress.

During the second *Shared Learning* program *twinning* visits between pairs of rural area core groups were used to enhance process working and networking on a project to project basis. Meetings between those with specialist interests formed another aspect within the public arena where technical and other details were exchanged openly between the participants.

Enough trust, as distinct from absolute trust, must be maintained between the participants

Trust, we have found, is certainly not something that can come out of any training program or simulation. Trust, it turns out, is always the by-product of honoring agreements about how you are going to work together and how decisions are made.

Consistent process is what counts Trust may be enhanced in many different ways, but nothing beats consistently adhering to joint decisions and declarations made at the outset over the *who, what where* and *how* decisions affecting all of the parties working on change will be made during the program.

All sorts of changes in the plan of work can be made and tolerated in the light of experience or a changed external environment as long as those changes adhere to the agreed upon *rules of the game* as they are embodied in enabling statements or charters.

We can now say, given the numerous successful *Shared Learning* programs, that many genuine surprises were produced from the most unlikely sources within these programs, so much so that if one had been overly judgmental about the specifics at the outset of any program and had been simultaneously a betting-person, the picking of winners in advance, would have been as hazardous as that faced by the tipster in any ten horse race. This confirms for us that it is consistent process that it is the most important aspect of change management.

High profile process leadership and interaction between key individuals of the joint steering group is critical for success

Looking back on a number of *Shared Learning* programs makes it very clear that high profile process leadership and interaction between key individuals of the joint steering group provided purposeful motivation within a change process and toward their eventual success. While in each case local or on the ground ownership was fully achieved, systematic and ongoing involvement by members of the joint steering group was necessary to keep the overall process going.

Joint leadership of the process outlasts (particularly from the continuity of process perspective) the contribution of an individual or charismatic leader within programs dedicated to permanent culture change. Promoting this nuance as a distinction within an overall concept of leadership without losing the decisive contribution and visionary potential of individual leaders, where they existed, was very much more easily understood (accepted) when the methodology was first generated within the multi-site/multi-community situation.

* "The sharing of distinctly different aspirations and experiences, had not only created a synergy between participants: their dissimilarities instead of hindering the learning process had in fact enhanced their ability to focus on processes and the organization of such processes (the governance or political aspects of organization) rather than to talk past each other by focusing on the specifics of their different companies and countries."

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Clearly any individual was incapable of extending personal influence to impact significantly on outcomes within an initiative engaging ten separate organizations in two different Euro-economic regions (North and South of Ireland in pre-peace time).

It provides for alignment between those with clear and legitimate access to power. On a site by site basis, a judgement of the potential of the networking contributors to become aligned with the vision of the future competitiveness of each situation was made at the highest level (CEO for the individual organizations involved). Following this largely intuitive decision (taken by the management figurehead and confirmed by those in leadership roles in other institutionalized groupings) the leading roles adopted by nominees from within the key interest groups in the best examples were forged into a common approach to jointness. In this way a number of committed individuals with clear access to power (either positive or negative — proactive or reactive) agreed to agree with one another and to declare together the results of their joint activities. In these situations overall process leadership to achieve change was enhanced and not diminished.

The *HOW* of diffusing results, decisions and implementation should be an integral part of the process of change

We must always *walk the talk* according to the hypothesis that: *the introduction of successful change depends on the way each proposal is structured:*

Who participates in the problem solving and planning process...

What rules are applied...

What relationships are implemented.

The *Shared Learning* design, as it has evolved over the years, provides for repeated opportunities for *walking the talk* and continuously creating and recreating *enough trust* to successfully continue the process. Accordingly, from the very outset the active *Shared Learning* participants will be the ones (not experts and/or public affairs translators) who will actively participate (*walk the joint talk*) in introducing the changes and report to their peers on the ongoing process, as well as the solutions to be implemented throughout the organization.

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Let's recall that in each *Shared Learning* program there are a number of workshops (public arenas), as well as ongoing individual work by core groups and sharing between those paired/twinned between the schedules whole group public arenas. During the workshops, core group meetings and meetings between *twins*, it is the active participants, not experts or facilitators, who are:

- Deciding directions for change and the initial processes underpinning such change...
- Presenting and re-presenting these to each other within the public arenas of the program...
- Formulating explanatory content about historical relationship difficulties...
- Presenting joint intentions/plans/decisions...
- Sharing the evolving plans, recorded achievement and failure with comparators as peers and within concurrent time frames...
- Letting the leaders lead, participate and share.

At the end of the process the perception should be it was they rather than the facilitator or experts who led the sharing of their experience and promulgated the usefulness of the processes involved.

For diffusion and/or implementation the approach should be:

- Use the experts for their expertise alone, particularly at the design and early stages of the change process...
- Use the direct-participant change agents as the people to communicate and convince other audiences to embrace change in the future.

This acknowledges that blockages to diffusion and implementation from site to site are probably more likely to occur because of workplace politics rather than workplace attitudes.

The emphasis is to create opportunities within which actual learners can share experiences with one another rather than allow training specialists to design communications arenas within which process experts attempt to train others in the knowledge, skills and attitudes of change management.

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The facilitator's role. The role of the process facilitator/change expert is to act as the designer and redesigner of the process for those involved in and leading the process itself. In a number of cases, all design and redesign work is done with the steering group off-site and the redesign presented by the steering group participants to the core groups without the facilitator/expert being present.

Facilitators should not be concerned about the fact that considerable uncertainty and apprehension is widely in evidence at the outset of a shared learning change process. They can with confidence work toward a situation where the rigor of the overall design and the inevitability of the timeframe implications and reporting expectations within the evolving public arenas of the process will produce effective outcomes rather than procedural correctness often considered more important in historical change models.

Facilitators should constantly remind themselves that participative change management is at most an art form in which they have a temporary and indirect mandate and is not a science, nor an ideology. Participative change management should facilitate the promotion of mixed competence and diversity as strength and as such should be regarded as being pluralist in its intent.

The *golden rule* for organizational design specialists/facilitators during a *Shared Learning* process should be something like this: *if anyone in the room looks to you when a significant process or content question is raised or when the air grows thick with tension, your profile is too high and the profile of those who are jointly leading the change process is too low.*

An estimate of what outcomes or rewards will accrue to the different participants/stakeholders should be made explicit

Rewards: what's in it for us/me? In other words some formulation of *what's in it for us/me* as a reward or outcome should be estimated and shared at the most appropriate stages in the evolving process. Where clarification of this matter is called for, it may be faced-up to in an open way within the enabling statement or compact agreed between the parties. Rewards, as understood here, can be divided between process and content rewards.

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Process rewards..The cycles of feedback themselves (the various public arenas of the change program) should confirm that genuinely collaborative arrangements in the pursuit of substantively important goals, can deliver significant results. (When independent evaluation and assessment — which I highly recommend — is built into the process, it can confirm this judgement. Direct acknowledgements of contributions within the building of proposals for change and increased complementary skills that build personal competence and demonstrate enhanced flexibility of individuals and groups and growing self sufficiency in joint problem solving will also contribute to intrinsic satisfaction by participants for their part in the process.

Content rewards..When proposals directly identifiable with the process make up the content of the changes introduced, a number of rewarding outcomes accrue:

- *For the employee*Enhanced and sustained competitiveness and ongoing provisions for continuous improvement etc.
- *For the employee*Specific commitment to develop and negotiate terms of progressive wage systems (pay for knowledge, within future flexible working arrangements). Commitment to make serious provisions for employment security and policies for training and retraining of job holders in situations of unavoidable labor force adjustment etc.

Engaging and rewarding participants at the early stages of the process where outcomes or payoffs are not yet achieved or measurable may be still accomplished by noting the various steps taken, *travelling*done to arrive at the enabling statement.

In our first North–South multi–industry process potential confusion was avoided within one of the companies in the program when agreement was reached on the following statement.

“The company and unions recognize also the separate roles of the negotiating and participatory functions. Participation while it involves a commitment to common good and to the development of effective solutions in a co–operative fashion does not inhibit the collective bargaining process which takes place separately.

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Equally the collective bargaining process does not inhibit the effective development of ideas processed by participatory groups. Participation reflects the shared interests of achieving company effectiveness while collective bargaining reflects the distinct interests when sharing the benefits of company effectiveness”.

When this statement was accepted by both sides they could see that each side had already travelled a good distance toward working together on joint interests.

Some closing thoughts

What is potential of *Shared Learning*? The excitement by the late Prof. Keith Thurley of the London School of Economics, when in commenting on the results of the inaugural multi-site shared learning program (in which he played an important part) was stated in this way:

“Shared learning is exciting and inspirational and it is now clear that it is more effective than discrete or individual company projects.”

Professor Thurley was at that time synthesizing the views of the twenty or so international expert contributors within this first program, into a composite view about the potential of the approach. He stated in response to the question: “What is its potential?”

1. It taps existing resources which are otherwise wasted
2. Given (#1) it is relatively inexpensive
3. It is very relevant for situations calling for strategic change
4. It could be used in groups of companies or within one large organization
5. It can provide mass attack on problems

What has *Shared Learning* demonstrated?

1. After slow take-off— fast change is possible
2. Core groups can produce effective solutions
3. A fuller use of human talent/capacity depends on a critical mass of support
4. Innovation requires pro-active education (to provide new way of seeing old problems)

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5. A prior condition for change is to raise expectations and standards
6. Innovation needs comparators
7. Through its carefully structured networking design it allows participants to create and re-create enough trust to fully engage themselves in cooperative/collaborative work toward jointly supported ends.
8. Shared Learning is robust enough to work well in different organizational cultures, as well as across different national cultures.

Shared Learning and the need to face ongoing change — One of the greatest strengths of *Shared Learning*ies, perhaps, within the power of one of its seemingly paradoxical aspects:

The conscious setting of limits for a process, liberates its participants.

Shared Learning works well to a large extent because it creates boundaries for the change process. Executives, supervisors and frontline workers alike are freed, within the agreed upon *rules of the game* to put forth great focused effort for a set period of time to move the organization in a direction that all agree is beneficial.

We don't have to sign up for life to any change process but we know we will need to change again. Recent *Shared Learning* experience with a high-tech electronics manufacturer has brought forth a somewhat new wrinkle in its application. (I say somewhat new because it relates back to, in some ways, to the first two Euro-pilot projects. More about this in a moment.)

The high-tech firm knew from the start that *Shared Learning* set boundaries and had a definite beginning and ending. They developed and signed off on an enabling statement for a labor-management partnership to accomplish set goals. Then, after the core groups were already working on the change and looking forward to the first workshop six months hence, ongoing feedback between the participants and their stakeholders told them they had *missed* making these relationships clear.

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They then reconvened to revisit the enabling statement (which they viewed as being a permanent draft). An additional to accompany the enabling statement was constructed to include the following language:

“One of the key strengths of a progressive company in the modern world is its ability to be flexible in responding to its business environment and to have a positive outlook on the need for and the nature of change — a partnership approach will be crucial in order to underpin such flexibility.... Partnership in this context where pressure of time is crucial~~be~~ developed so that process delays or disagreement will not prevent progress and sometimes direct management action will be appropriate to maintain the momentum for change. Any difficulties will be addressed in later review sessions and the spirit of cooperation preserved. Leadership will be required to overcome obstacles and the uninhibited access to collective bargaining arrangements will always be available if/where necessary.” (emphasis added)

This added language demonstrates they realize that even though they are signing up for one set of change only, new and unforeseen needs for change are likely to appear. And when that time comes they will use a “new” *Shared Learning* process to address it. In other words, they have selected targeted or boundaried partnership and *Shared Learning* as their permanent way of dealing with change. To accommodate this need this Shared Learning process will now include increasing the firm’s capacity for change by training employees of the firm to act as Shared Learning facilitators in the future. This firm’s decision may be saying to us that in the future, we may see a number of organizations who will decide to adopt the *Shared Learning* process as their focused or ~~boundaried~~ vehicle for change.

How does this firm’s choice to use *Shared Learning* repeatedly relate to the first two *Shared Learning* projects? The first *Shared Learning* project was used to successfully introduce employee involvement processes into a number of different firms simultaneously. It is not much of a stretch to imagine government, business and labor jointly deciding (as some communities in the United States have with community quality councils) that the *Shared Learning* process should be used repeatedly to introduce quality and participation processes into all of the significant organizations within a community to enhance their ability to maintain and attract business.

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Similarly, the *Integrated Rural Development* (IRD) project could not only be repeated in additional rural districts as an economic development planning vehicle and catalyst, we could now envision it being used a second and third or fourth time within the same communities to build upon, or extend the successes of its first application. In fact, the IRD project was seen somewhat in that manner: we trained a number of facilitators in the *Shared Learning* methods and principles to demonstrate that additional rural economic development projects could be launched simultaneously as funding became available.

Ten years may seem to be a long time to test out a process. Yet these ten years have just shown us the potential of the *Shared Learning* process. We know within what types of settings and circumstances it works well and what the most important design principles appear to be. What we have to look forward to, and what I invite the reader to join with me in, is to discover new areas for its use and to demonstrate to a still skeptical world that competent, mature ordinary people can through participative process make effective and valued change for their communities and their organizations.



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