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SWORD workbook:

KFP 3 Learning Organisation

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Introduction

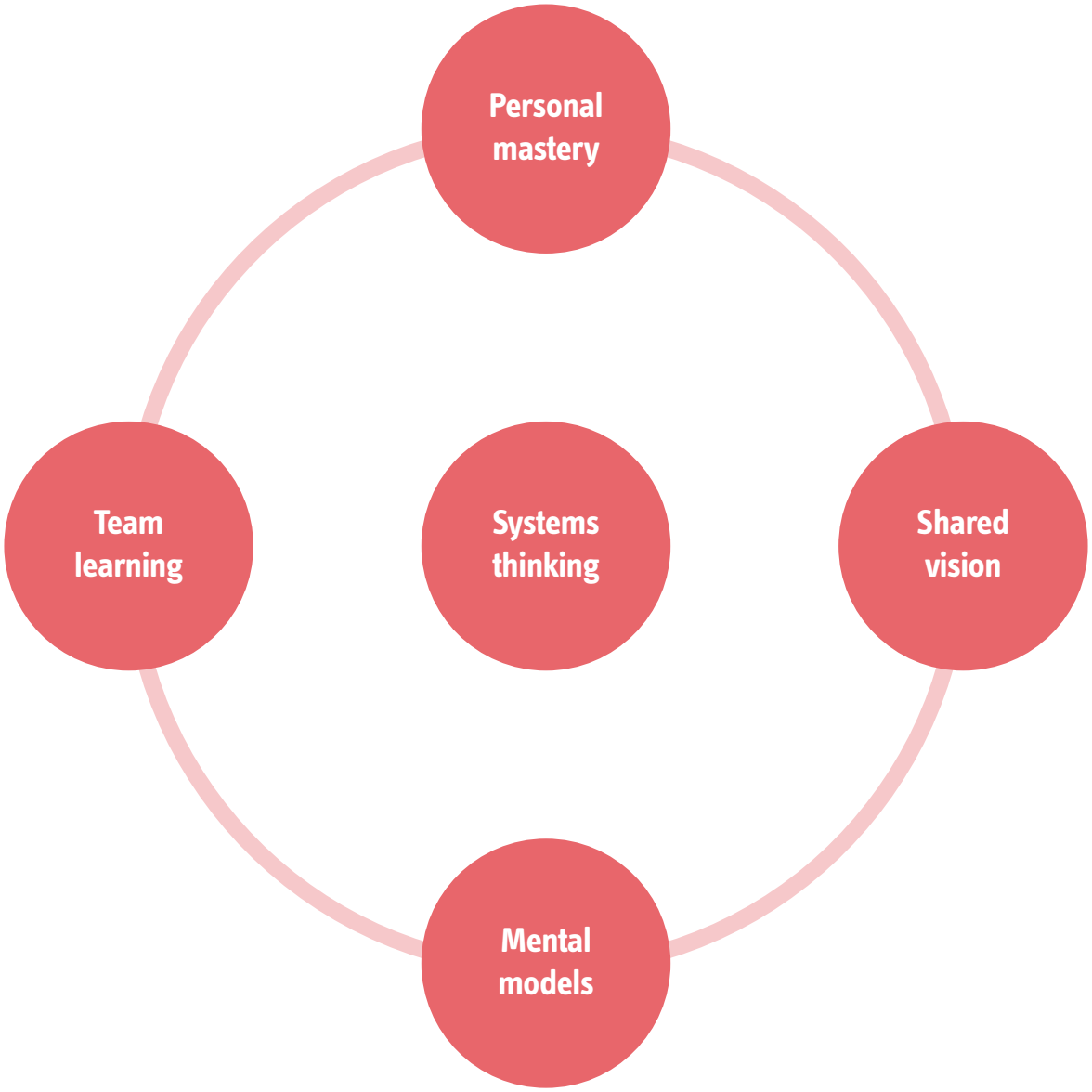
To be resilient, an organisation needs to ensure that learning and development is at the heart of all that they do. Developing a learning organisation is the third Key Foundational Principle. A learning organisation is one in which:

- Beliefs, goals and objectives are shared and underpinned by social work values.
- Individuals, teams and the organisation itself reflect and learn from experience.
- An evidence-informed approach to improving practice and managing change, with input from practitioners, is actively encouraged.
- Problems provide learning opportunities rather than individual blame or scapegoating.

Learning from experience and adapting to new challenges and opportunities underpin healthy and successful organisations. A learning organisation has been defined as:

> ... a place where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole (reality) together. (Senge, 1992)

Figure 3.1: Dimensions of a learning organisation



According to Senge, learning organisations have five inter-related dimensions (see Figure 3.1).

1. Systems thinking: seeing the forest as well as the trees

People see the 'big picture' rather than focus on individual components. Awareness of the complexity of the organisation allows them to identify patterns of cause and effect. People are then able to work towards long-term solutions to problems by addressing the underlying causes, rather than implementing superficial quick fixes.

2. Personal mastery: an orientation towards personal growth and learning

People have a strong sense of purpose that underpins their personal goals. They work with change not against it. They feel connected to others rather than alienated from them and are engaged in a continual cycle of reflection and learning.

3. Mental models: revealing our hidden assumptions and beliefs

People are reflective, and their thinking and mental models are not fixed or embedded in entrenched beliefs and assumptions. Rather, people are sufficiently flexible to adapt their mental model through current experience, learning and reflection.

4. Building a shared vision: being bound together by a common aspiration

People have a common vision that underpins the organisation's focus and energy for learning. Building a shared vision and ensuring that their own vision is aligned with that of others, is a key aspect of leaders' work.

5. Team learning: working in synchrony

Although team learning stems from personal mastery, people use their individual talents, knowledge and experiences to work collaboratively towards a common goal. Knowledge is shared, communication is open and honest, and there is a free flow of ideas, even when some of those may be in conflict.

Although the five dimensions offer guidance on the features of a learning organisation, it is important to remember that one size doesn't fit all. The optimum environment for reflection and learning is one that is precisely aligned to the organisation's goals, but sufficiently flexible to accommodate change. The Social Care Institute for Excellence has produced a self-assessment resource pack for organisations to assess the extent to which they are a learning organisation (SCIE, 2008); this can be accessed **here**.

Reflective leadership: making time to talk and space to listen

Reflective learning is a fundamental to how any learning organisation operates but is particularly important in social work. Although managers may believe they provide reflective opportunities for practitioners, all too often supervision is driven by task management and an agenda focused on compliance. There is evidence that the supervision social workers receive is of variable quality and does not consistently or adequately meet their emotional needs (Wilkins et al., 2017). Truly reflective organisations recognise the importance of critical thinking, learning and growth, and provide opportunities for practitioners to unpack the complex emotional demands of social work practice and learning.

Social workers often attempt to cope with anxiety engendered by complex practice by focusing on tasks and targets, rather than exploring also their emotional reactions. So it is vital to create 'reflective spaces' where practitioners are able to critically explore their practice. Failing to acknowledge the emotional demands placed upon them can have a profound impact on social workers: it can impair decision-making abilities, inhibit motivation and job satisfaction, increase the risk of compassion fatigue and emotional exhaustion, and contribute to negative outcomes for children, families and adults (Grant & Kinman, 2014). A lack of opportunity for reflection can also encourage a false sense of security. For example, without an opportunity to reflect, a worker may be tempted to send a flurry of emails highlighting the tasks they have accomplished, rather than offer a more balanced and comprehensive assessment of achievement that also addresses any underlying concerns that may require further attention.

Reflective learning must be deeply embedded in social work organisations. And managers should ensure it is happening in practice, not just in theory. Opportunities for reflective learning will be maximised in a culture where the value of learning is emphasised, blaming and scapegoating are avoided, and there is an appreciation that mistakes, near misses and poor or limited outcomes are opportunities for learning.

Modelling reflective leadership is crucial for successful organisations. Leaders and managers need to model reflective practice personally, as well as encourage it through supervision. Only reflective leaders can foster a learning organisation, as they will draw upon the collective expertise of the teams around them to make decisions. Reflective leaders:

- Are flexible
- Regularly step out of their routine and familiar environment to think, explore and learn
- Question others for alternative points of view, and make sure they consider a wide range of options before taking action (see the section on 'walking the floor' in KFP2 Sense of Appreciation).

You may be thinking: 'This describes me very well; I am just like that.' But we can easily become defensive or reluctant to consider different perspectives. This can lead us to become stuck or fixated on a decision or pattern of behaviour. The iceberg model (Box 3.1) is a useful analogy to help you think through why you have come to a particular decision, and to check out what might 'lie beneath'.

Box 3.1: 'Using the iceberg model to support reflective leadership and practice'

Do you ever wonder why you (or others) have reached a standpoint on a key issue and become stuck? When colleagues are intransigent, do you see them as stubborn? Or do you seek to understand the reasons that might underpin their behaviour? The iceberg model can help an individual or group detect the 'mental models' and patterns of behaviour that underlie a particular interpretation of an event.

Drawing on Freud's theory of the human mind, the model recognises that the larger part of what we believe is hidden under the surface, yet that is what helps us understand ourselves and those we work with more effectively. Just like an iceberg, what we see on the surface is only an event or behaviour. But identifying what lies beneath can only be accomplished when practitioners feel safe, and leaders have the emotional literacy to engage in honest, reflective conversations.

Research in Practice has an excellent range of resources, and a summary of research evidence, to support critical thinking and reflective analysis in both group and one-to-one supervision sessions. These will help practitioners explore beneath the surface and help develop organisational, team and individual resilience. The tools are available here.

Reflection is often seen as an individual activity, but Intervision (Staempfli & Fairtlough, 2019) is a peer-led method of reflection in which participants follow a specified process to discuss professional practice issues. This technique, which encourages a learning organisational culture, is rarely found in the UK but widely used by social workers in other European countries. There is some evidence that Intervision is supportive, can enhance professional development and can also offer opportunities for emotional containment (Staempfli & Fairtlough, 2019). For more information on Intervision see **here**.

As a leader, you must also ensure that you have reflective space for yourself. Leadership can be isolating, so it is crucial to create opportunities for support. Quick Win 3.1 describes how creating a Personal Board of Directors can enable you, as a leader, to get the support you need to create an environment for personal reflection and learning.

Quick Win 3.1: Creating your own Personal Board of Directors (PBOD)

A successful organisation will have an effective Board of Directors, usually comprising people from different walks of life with diverse backgrounds and a range of skills and talents. They offer committed and ongoing support for the organisation, but also a critique and different perspectives on problems.

Being a leader in a social work organisation can be lonely. Leaders may have few people around who can provide support. So, creating your own *Personal* Board of Directors (PBOD) can help – a group of individuals (from in and outside the workplace) who can act as a sounding board and help you when you face a dilemma, work issue, when you need affirmation, or to challenge you if you are stuck.

Your PBOD will probably need to include people with one or more of the following qualities:

Someone who is a major support for you personally and professionally	Someone who can help you be creative	Someone who's good at coming up with practical solutions	Someone who has years of experience and accumulated wisdom
Someone you find it easy to accept criticism from	Someone who knows you better than you know yourself	Someone with directly relevant skills and expertise – i.e. they've done a job very similar to yours	Someone who is a role model for you.

Remember this is an honorary, unpaid role! So, you may need to find ways of reciprocating or showing thanks to the members of your PBOD.

Serious Success Reviews: learning from what goes well, not only from mistakes

It is widely acknowledged that learning from any errors in practice is crucial to enhancing practice and implementing change. While it is natural to wish to hide any embarrassment or anxiety associated with failure, mistakes can be a stepping-stone to better things. Serious Case Reviews, Safeguarding Adults Reviews, independent investigations into homicides (mental health homicide reviews) and inquests following suicide are key mechanisms for learning how to improve health and social work practice, both individually and collectively. Reflective leadership is crucial to this process. Leaders and managers must recognise that mistakes are both inevitable and learning opportunities, and so not react defensively or by attributing blame.

Social work can become overly focused on what has gone wrong rather than things that go right, however, developing a learning culture is not just about learning from errors. Learning from what went well also enables better outcomes for children, families and adults. Organisations are more effective when they can recognise, learn from and build on good practice – see Box 3.2. As a profession, we need to identify what 'good looks like' so it can guide us when things go awry.

Box 3.2: Serious Case Reviews: Using positive outcomes to reflect on practice

Recent research by Forrester and colleagues (2019) explored the relationship between key social work skills and outcomes in child and family work. They asked social workers how they recognise what 'good' looks like. Responses highlighted the importance of the use of good authority and relationship-building skills, as well as having the space to reflect on how they might be enhanced.

Similarly, social work with adults is increasingly moving toward a strengths-based approach, which has a focus on relationship-building. Practitioners work in a person-centred way to engage people with care and support needs in identifying their personal skills and assets, which can inform the way in which care is accessed. Good practice is collaborative and facilitates maximum independence for people receiving care and support (Department of Health, 2017).

Bexley Council have introduced the idea of Serious Success Reviews to identify the features of good social work practice (as well as what works less well) – see Stevenson (2017) available here. This approach is likely to be more effective in ensuring fitness for purpose than simply 'tweaking' an existing process or procedure. Social work leaders and managers could use Appreciative Inquiry (see KFP2 Sense of Appreciation) and other consultative approaches to explore what constitutes good practice in their organisation.

Schwartz Rounds

Schwartz Rounds are named after Kenneth Schwartz, an American attorney who recognised the importance of compassionate care and acts of kindness while undergoing treatment for cancer. His experiences inspired the introduction of Schwartz Rounds, which provide an opportunity for healthcare practitioners to share their experiences, thoughts and feelings on issues arising from patients' individual cases. This not only helps practitioners to improve the quality of their personal connections, with both patients and colleagues, but also to gain more insight into their own responses and feelings.

Schwartz Rounds now run in many acute and community-based healthcare organisations and in several countries. For practitioners, identified benefits include improved personal relationships, wellbeing and job performance (Robert et al., 2017). Participation has also been found to aid reflection, compassion and collaboration, and to increase trust, reduce isolation and enhance a sense of shared purpose (Reed et al., 2015).

Cullen (2016) suggests Schwartz Rounds may be effective for social workers, as social workers also provide care and protection, and are themselves at risk of distress and burnout. Schwartz Rounds can help build a learning organisation by providing a structured forum for multi-disciplinary groups to discuss the emotional and social aspects of their work. At the time of writing (November, 2019) a project is underway to evaluate the effects of Schwartz Rounds on the mental health of practitioners working in six local authority children's social care services in England; for more information, see **here**. More information on Schwartz Rounds, including resources, can be found on The Point of Care Foundation's website **here**.

Learning from critical incidents and managing organisational shock

Critical incidents are not uncommon in social work organisations, and they can have serious implications for social workers' wellbeing and practice. However good we are at managing and learning from critical incidents, a crisis (such as criticism or blame after a child's death or the exposure of abuse of an adult with a learning disability) can sometimes send shock waves through an organisation. This can lead to a 'perfect storm': a combination of events or circumstances that has the potential to bring adversity to an organisation.

If not managed effectively, such situations can cause widespread damage – to individuals, the organisation and the profession. An organisation's initial response to shock may be paralysis or panic, neither of which will help people on the ground continue to work effectively. According to Mellor:

> Staff at all levels can feel bewildered and overwhelmed by a genuine sense of loss, fear of change and potential loss of job security. When a shock event happens, leaders need to be able to access emergency support that provides calm and expert advice on dealing with the practicalities and emotional impact of the immediate situation and those most closely affected by it. (Mellor, undated)

Moreover, statutory and legal processes and investigations may continue for some time, possibly years. So organisational shocks may continue and it is important to acknowledge that the impact will vary. For some, the stress may be long lasting. Leaders should be aware that, like any personally upsetting event, an organisation's reaction to a critical incident may be one, or all, of the following:

- Shock
- Fear
- Anger
- Shame and guilt
- A sense of injustice.

Initially, communicating the news clearly, internally and externally, and making space for managing the crisis are crucial. Mellor identifies three stages for managing a major event (more information can be found **here**):

- Response
- Resolution, and
- Recovery.

Organisations that ignore the impact of a difficult or traumatic event, and try to carry on as normal, are often working on an adrenaline-fuelled stress response, instead of considering the need for an alternative approach or re-grouping. Under the *Health and Social Care Act 2008*, organisations have a duty of candour to provide specific information when things go wrong. There should be mechanisms in place to help them recognise what has happened, how to respond, how to resolve the issue, and how to ensure there is space for recovery. Treisman (2018) provides useful guidance and practical tips on helping organisations become more 'culturally, adversity and trauma-informed', and warns against the risks of simplistic and tokenistic initiatives to promote trauma-informed and responsive practice; for more information see **here**.

Emotionally literate leadership is crucial for a considered and effective response to a shock or crisis, which means leaders must be able to recognise and manage their own emotions. There are frameworks that can help them process and articulate their feelings. For example, the following questions (derived from Linsley & Horner, 2012) are a useful way to scaffold thoughts and feelings.

Here is what we are facing (assessment)

Here is what I think we should do (option appraisal)

Here is why (evidence base).

Box 3.3 provides a framework that can be used when analysing critical incidents in general in order to enable learning and reflection.

Box 3.3: Critical incident technique

Critical incident analysis is a structured form of learning and reflection. It involves:

Describing a difficult or serious incident that was particularly challenging Suggesting an explanation, given the immediate context

Asking questions to find different explanations for the dilemma, exploring theories, values, assumptions and defensive mechanisms and biases

Considering the implication for future practice.

(adapted from Tripp, 2011)

Peer coaching

Setting up a peer coaching system is an effective and low-cost way to help organisations move from a problem-focused culture to a strengths-based and solution-focused orientation. Peer coaching is a relationship between two people of equal status that facilitates the achievement of specific goals. It can also be a source of professional development more generally and used to share ideas, develop skills and improve support.

Peer coaching aims to:

- Provide a structured approach to helping
- Enable someone to generate specific, measurable goals that are realistic but stretching
- Help them identify how they are going to achieve those goals
- Provide objective, non-evaluative feedback about how they are progressing
- Offer support and encouragement when they need it.

Box 3.4: How does peer coaching work?

Peer coaching is a relationship in which colleagues pair up as coach and 'coachee' (i.e. the person being coached). This is often, not always, reciprocal.

It draws on intrinsic values and beliefs.

It uses the GROW model as a framework:

- The coachee identifies the GOAL they wish to achieve
- The coach helps them reflect on how REALISTIC the goal is, based on their commitments and the time and resources available
- Both parties work together to help the coachee generate a range of creative OPTIONS for meeting the goal
- The coachee develops the WILL to meet the goal by making an action plan and a commitment to making changes or taking action.

It utilises SMART goals (Specific, Measurable, Achievable, Relevant and Timely).

It provides non-evaluative, specific feedback based on an objective observation, or reflecting back what is heard. This gives the coachee the encouragement to move forward.

Box 3.4: How does peer coaching work? (continued)

There are some practical considerations that must be considered when setting up a peer coaching relationship:

Trust between partners is essential, because the process requires self-disclosure.

Partners should be well matched in their working styles and expectations.

Peer coaching can be done face-to-face, via Skype or on the phone. But regular and formal contact (by any of these methods) is essential to ensure the coachee maintains focus on their goals.

Venting is important, but the coach should help the coachee move beyond this to enable them to provide solutions.

The coach needs to keep the conversation on track. It is easy to drift.

Active listening and open/probing questions are required.

The benefits of solution-focused coaching include enhanced goal-setting and stress management skills, as well as improved wellbeing and job satisfaction (Gyllensten & Palmer, 2006). There is also evidence that peer coaching protects mental health during times of high stress (Short et al., 2010). And being a peer coach can help develop key interpersonal skills such as active listening, building rapport, trust, empathy, reflection and awareness raising, which can be used to enhance social workers' relationships with children and families. Peer coaching techniques can also be used effectively in supervision.

Guidance on how to move from focusing only on problems to focusing on solutions is set out in Box 3.5. This technique can also be used as an exercise, working in pairs.

Box 3.5: Moving from a problem-focus to a solution-focus in a peer coaching session

Being problem-focused	Being solution-focused
Use the questions below to talk, for about five minutes, about a recent situation that has caused you difficulty. Person A describes the situation. Person B directs the conversation with the following questions.	Use the questions below and talk, for about five minutes, about a problem that you have. When using a solution-focused approach, it is essential to help the coachee 'reframe' their 'intractable' problem into a more manageable one. Use the following questions:
'So, what is the problem?'	'So, how would you like the situation to be?'
'What happened?'	'What will it take to get what you want?'
'What do you think is the cause of the problem?	'What resources do you need?'
'Who is to blame?'	'What resources do you already have?'
'What have you tried in order to fix it?'	'What two small steps could you take to help fix the situation?'
'Why is this still a problem?'	
'How can you stop this happening again?'	'How far have you come already? Are there times when the solution is present, at least partly?'

Sparkling Moments (see KFP2 Sense of Appreciation) can also be used in a peer coaching situation. They can help people move to a generally more positive mindset and identify external and personal resources (such as support and skills) that can help reach a solution.

It is important to remember, however, that while peer coaching can be effective, it is not counselling. Coaches must remain within their competencies. If a coachee has deep-seated personal problems, professional help will be required. For more information on setting up a peer coaching initiative in social work organisations, see Baker and Jones (2014).

Working with strengths

When trying to resolve problems, we often focus on our weaknesses and think of ways to address them. This can be stressful and draining. A learning organisation will be aware of its practitioners' strengths and how they can best be used. As social workers, we know that working with strengths identifies the things people do well, that energise them and that they find enjoyable. However, we don't always apply these ideas to ourselves, focusing instead on areas for improvement rather than the assets we have at our disposal.

Strengths are often confused with skills that people can perform well, but skills are learned behaviours that may become ingrained and automatic over time. It's easy to mistake skills for strengths because people are good at them, but skills do not energise or engage people in the same way. Strengths are not static; a person can build, grow, adapt and develop their strengths to help themselves in different situations. People who use their strengths are more likely to achieve their goals, experience less stress, and have more self-esteem and confidence; they also tend to be happier and more resilient.

Being aware of strengths

When developing organisational resilience, it is crucial to work with strengths. As role models, leaders should be aware of their own strengths and those of other people. Three Quick Wins (3.2, 3.3 and 3.4) provide some techniques to raise awareness of personal strengths in the self and in others. As well as role-modelling 'strengths-spotting', share these exercises widely in your organisation. They can be used in various settings such as meetings and supervision.

Quick Win 3.2: Strengths-spotting

Spotting your personal strengths Ask yourself the following questions:	Spotting the strengths of others
Deep roots: What do you still do now that you did as a child?	**Build a language of character strengths:** Develop an understanding of the different personal strengths to improve your ability to spot them in others; see the list of character strengths here.
Motivation: What activities do you do just because you love doing them?	Develop your observation and listening skills: Enhance your awareness of what strengths look like in action, based on: a) verbal cues (listen for a more assertive voice, improved vocabulary and clarity of speech, and use of specific strengths words); and b) nonverbal cues (look for improved posture and eye contact, smiling and laughing, greater use of gestures signifying excitement and passion).
Voice: When does the tone of your voice indicate enjoyment and energy?	
Energy: What activities do you do that give you energy?	
Rapid learning: What things do you pick up effortlessly and quickly?	Label and explain character-strength behaviours: Show people that you notice when they show their strengths by: a) identifying the specific strength demonstrated; b) explaining how you spotted it; c) showing that this strength is appreciated.
Authenticity: When do you feel like 'the real me'?	
Attention: Where do you naturally pay attention?	Make strengths-spotting a habit: Build your skills by practicing observing character strengths in people in different situations.
Ease: What activities come easily to you?	

Quick win 3.3: Spotting character strengths in meetings

Go into meetings wearing your 'strengths goggles': i.e. a mindset that identifies strengths as they happen. After you spot strengths in people, point out the strength that you observed, tell them the reason for your observation and express your appreciation.

Quick win 3.4: Using character strengths to improve relationships

Spotting character strengths can help us improve relationships with people who we find challenging. Focusing on things that irritate us about others can often blind us to noticing their strong points. Looking for the strengths in other people enhances feelings of empathy where we can respect diversity and value and appreciate their talents.

Increasing flexibility: doing things differently

Flexibility is an important characteristic of learning organisations and those who lead them. Psychological flexibility means adapting successfully to changing situational demands; it can help people adapt their mental resources and behaviours in response to change. People who are flexible are better able to balance competing needs and life domains, while remaining committed to their goals and values. Grant and Kinman have found that social workers who are more flexible tend to be more resilient; this in turn protects them from work-related stress and burnout. Flexibility also enables people to think about problems and tasks in more creative ways. Our habits can undermine our ability to meet new challenges; changing unproductive behaviours can help us feel less stressed, happier and more in control (Fletcher & Pine, 2012).

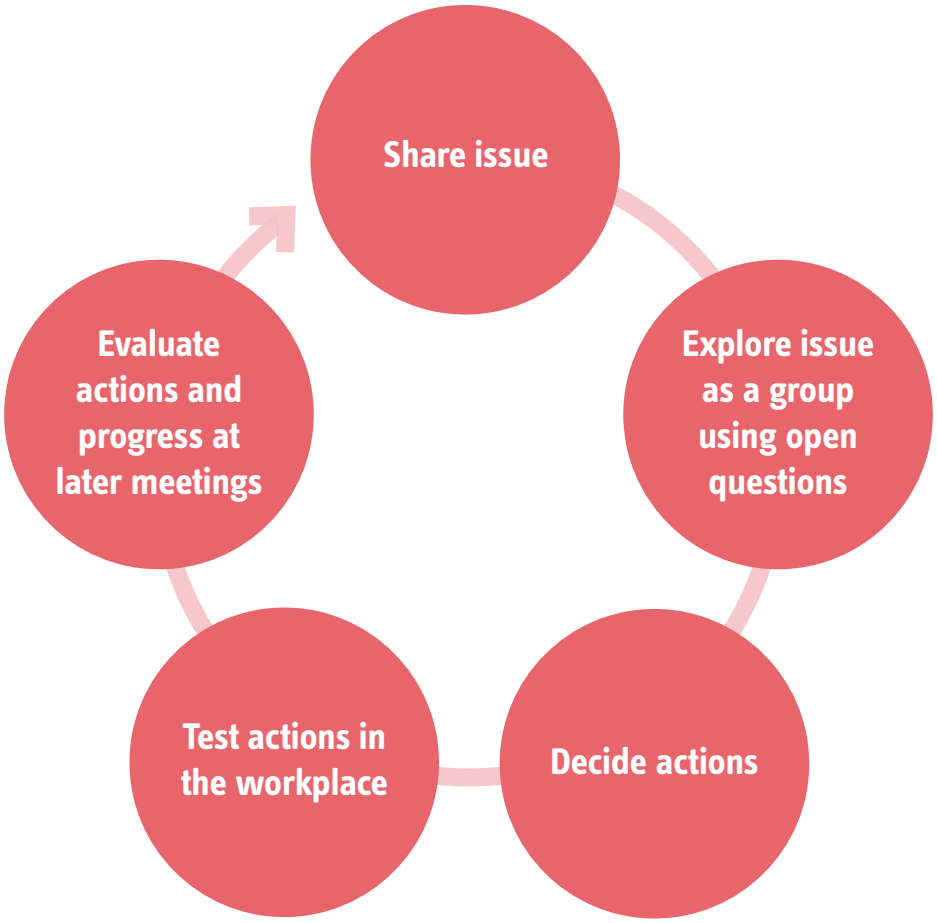
Although we each have a toolkit of useful behaviours, people tend to over-use the same tools, regardless of whether they are appropriate for the situation. Small actions can break habits and lead to changes in behaviour; maintaining these changes can give you the confidence to take on new challenges. Changing something about your work routine and reflecting on the outcomes can be effective. For example, eat your lunch somewhere different and see if your mind is clearer. Keeping a list of things that you have accomplished throughout the day (and encouraging those you manage to do so also) can be particularly helpful in making lasting change. KFP4 Mission and Vision offers some guidance on making 'I did' lists and how these (and other techniques) can be used to improve your productivity.

Using Action Learning Sets for group learning

> Action learning is an approach to the development of people in organisations which takes the task as the vehicle for learning. It is based on the premise that there is no learning without action and no sober and deliberate action without learning. (Pedler, 1991)

Action Learning Sets are opportunities for workers, managers and leaders to meet regularly to explore solutions to problems and decide on the action they wish to take. They are particularly useful for helping participants consider complex problems where there is no simple answer. If structured properly (see Boxes 3.6 and 3.7), an Action Learning Set will promote curiosity, inquiry, reflection and – ultimately – learning, which can be applied to action planning (as outlined in Figure 3.2; this will be familiar as it draws on the reflective learning cycle).

Figure 3.2: The action learning cycle



Box 3.6: An Action Learning Set in action

An Action Learning Set usually comprises between six and eight participants who are committed to meeting on a regular basis to learn from each other in a safe reflective space. The more diverse the participants are, in terms of their background and experience, the better.

Participants take it in turns to be the presenter. This involves describing a situation or problem they face (around 5 minutes).

A period of open reflective questioning follows (around 5-10 minutes) in which the presenter answers openly, honestly and reflectively; no advice is given at this stage.

The group can then spend some time discussing the problem, as they see it, with the presenter merely listening – as if they were a 'fly on the wall' (around 5-10 minutes).

The penultimate stage is where the presenter reflects on the insights gained and the ideas for implementation that have been generated (around 10 minutes).

For the final stage, the whole group discusses the learning gained and helps the presenter to action plan, if that is requested (around 5-10 minutes). Actions are then tried out in the workplace and the group discusses the learning gained next time they meet, with the process repeated.

Box 3.7: Effective questions for action learning

Using reflective open questions is crucial to running a successful Action Learning Set. Here are some examples of questions that can encourage learning.

Questions to identify the issue and the desired outcome

- What are you hoping to achieve?
- What is the difference between how you see things now, and how you would like them to be in future?
- Who might help you accomplish change?
- What obstacles do you anticipate?

Questions to explore below the surface

- What happened? Can you provide an example?
- How did you feel about that?
- What assumptions might you be making?
- What do you think might happen in future?
- How might this decision affect others?

Questions to encourage learning

- What opportunities are there in the situation?
- What would success look like?
- What metaphor could you use to describe the situation?
- What have you tried in the past? Why did/didn't it work?
- Who could you approach for advice and support?

Questions to explore options

- What if ...?
- What do you think about ...?
- How do you feel about ...?
- What would happen if you did nothing?

Questions to identify next steps

- How do you plan to move this forward?
- Where could you get more information?
- What actions are you going to take before the next meeting?
- How can we help you make progress?

Further questions can be found here.