



# In What Ways Is Your Workplace a Learning Organization?: A Reflection and Planning Inventory



**NEXT LEVEL**  
LAB



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## Introduction

This Reflection and Planning Inventory is designed to help you consider whether, and in what ways, your organization supports growth and development of individuals and groups as learners. In other words, it asks whether your organization is a learning organization. It is a research-based instrument that draws upon the best of what is known about effective learning contexts. How might you use the inventory? Here are some suggestions based upon input from collaborators who shared their feedback and insights:

- To develop a baseline measure of where your organization currently stands against which to chart future growth.
- To revisit the inventory at given intervals to offer a sense of progress and areas for attention.
- To offer a textured sense of what different aspects of effective learning and leadership in relation to learning look like.
- To suggest areas of learning that are less familiar—ones that you or others at your organization can seek opportunities to learn more about and to share what is learned with others.
- To identify specific areas for your organization to focus on.
- To help you as a learner to consider your own roles in the workplace and how you might approach them proactively.
- To help you as a leader of learning to plan opportunities for how to proactively support the learning of your team.
- To guide conversations about the organization with learners at many levels to help to recruit them as active participants in the growth of the workplace as a learning organization.
- To open conversations about rituals, conventions, and other mechanisms that could be introduced to support learning and growth.
- To help establish an asset-based environment in your workplace and help workers seek ways for bringing their own assets forward and further building their assets.
- To offer a tool for retention by providing a mechanism for workers to express needs, chart learning growth plans, and experience support in visualizing a future with the organization.

At the end of the inventory, there is a place to pause, reflect, and write some take-away thoughts. The last page of the inventory includes a glossary of terms, concepts, and phrases to help explain language that may be less familiar. As learners ourselves, we invite questions, feedback, and suggestions from those who have used the inventory towards developing helpful revisions.

This inventory was developed with support from Accenture Corporate Citizenship. With their support, the Next Level Lab is conducting workshops in support of helping people to meet these learning organization goals. We have existing modules and are continuing to build additional ones that can be taken online in order to learn more about the concepts discussed in the inventory. You can find publications and resources about our work on our website:

<https://nextlevellab.gse.harvard.edu/>

## In What Ways Is Your Workplace a Learning Organization?: A Reflection and Planning Inventory

In considering the statements below: 1. Seek to understand what type of learning/conception/support each item refers to. 2. Then, mentally explore possible examples for each type that may have happened in your workplace. 3. Then, consider the frequency with which each type occurs. Make your best assessment of each and use the inventory to guide you to ways that your organization can continue to learn.

	Not yet	A few times annually	A few times monthly	A few times weekly
<b>Identity as Learners/Views of Knowledge:</b>				
Everyone is viewed as being a learner.				
Those in managerial positions reflect about being a learner themselves with people at all levels.				
Knowing is viewed as distributed across the social community.				
Effort is invested towards everyone's expertise, interests, and knowledge assets being known and shared.				
Developmental relationships are encouraged to support people in learning from more experienced individuals.				
Developmental relationships are encouraged to support more experienced people in understanding novice perspectives, puzzles, questions, and insights.				
People are comfortable and supported in expressing when they do not know something or need to work on areas of weakness as an essential step towards further learning.				
People are encouraged to gain and use information about how "embodied minds" work in general and in their own individual case.				
There are project-based conversations where everyone learns from each other towards impacting action steps forward for the unit/organization.				
<b>Learning Structures:</b>				
There are opportunities for people to engage in formal trainings and professional development.				
There are opportunities for people to engage in informal learning.				
There are opportunities for people to learn asynchronously from distributed resources (courses, written materials, etc.).				
There are opportunities for people to learn with and from peers on project teams.				

People are encouraged to seek out experienced individuals within their social connections from whom they can learn well for support and mentorship.				
There are joint learning opportunities that everyone participates in.				
<b>Agency, Mastery Mindset, and Self-Regulated Learning:</b>				
People are given opportunities to set goals for new skills that they would like to learn.				
People are encouraged to assess their own areas of weakness/what skills they might need to build in order to develop their abilities.				
People have input into deciding at least some of the professional development and learning opportunities that they engage with.				
When something fails to work out the first time, it is used as an opportunity to fail forward by discussing what did and didn't work, making revisions, and trying again.				
<b>Feedback and Feed-Forward:</b>				
When offering feedback, feedback is given that offers information to address the gap between current performance and the performance goals that are being aimed for.				
When requesting feedback, people are encouraged to seek "feed-forward" information that helps them to get the information that they need to improve performance, aim higher, and set new goals for themselves.				
The evaluation process at the organization includes learning goals and efforts towards them.				
<b>Transfer and Adaptive Expertise:</b>				
People are explicitly encouraged to reflect upon existing assets that they bring to new tasks and to use those assets on tasks moving forward.				
People are encouraged to try out new tasks that share some aspects with previous experience but also introduce new features and challenges.				
People are encouraged to show unfinished work and rapidly iterate on novel work products as a mechanism of quickly starting with everything they know.				
Managers readily share "war stories" of times they have leveraged existing knowledge, skills, and abilities in new or novel contexts.				
<b>Contextualized Learning/Modifying Contexts:</b>				
People are given opportunities to learn new skills within their everyday work.				

People are encouraged to bring knowledge of how “embodied minds” work in general to bear on modifying workplace structures (for ex. How meetings are conducted or note-taking is done).				
People are encouraged to bring knowledge of how “embodied minds” work in individual cases to bear on modifying workplace structures.				
People are encouraged to modify their <i>physical</i> work contexts to support their best learning and performance.				
People are encouraged to modify their <i>social</i> work contexts to support their best learning and performance.				
People are encouraged to modify their <i>emotional</i> work contexts to support their best learning and performance.				
People are encouraged to modify their <i>cognitive/mental</i> work contexts to support their best learning and performance.				
People are encouraged to develop social networks for mentorship and to support their developing expertise.				
People are expected to engage in situational awareness upon starting new and novel tasks, projects, or roles, and to deliberate between what is similar vs. different to what they have done before.				

**Reflection Notes:**

## Glossary of Terms, Related Concepts, and Phrases:

**Adaptive Expertise:** Refers to an ability to think flexibly, adapt to varied contexts, and to gain new understandings. It is a flexible type of expertise and is related to knowing how to orient quickly to a new body or information, to learning skills, the ability to access the deep structures of a set of concepts to map it out, and the pursuit of progressive problem-solving at the edge of one's competence. It is typically contrasted to "classical expertise" or mastery in a particular field—a deep level of knowledge (obtained over 10,000 hours) within a subject. Classical experts tend to only be experts in one field; however, deep understanding of a topic based on lived experience with the right stance can invite further knowledge building and the pursuit of progressive problem-solving. Adaptive expertise is characterized by cognitive flexibility and by the tendencies to self-regulate through metacognition, to create progressive learning plans, to seek understanding about how one's mind and learning works, and to navigate contexts and cultures around learning.

**Embodied Minds:** Increasingly, research demonstrates that the separation of mind and body is a fallacy and that minds are part of the body system. The work of neuroscience researchers such as Joseph LeDoux and Antonio Damasio illustrates how bodily reactions interact with brain behaviors to compel choices and decisions. The inseparability of body and mind leads us to consider their integration and to attend to it in learning and work performance.

**Feedback:** Information that fills the gap between expectation/goals and performance; it can be information provided by the task itself, the individual doing the task, or other(s). It has four main foci: task (what the task requires), process (how to best work towards meeting the task goals), self-regulation (how to manage one's behaviors towards progress), and self (information gained about oneself through engagement with the task). Feedback includes information given to someone that helps them to understand where they're going and how to improve. One can consider feedback (focusing on past performance), feed up (thinking about what it means to level up), or feed-forward (focusing on what is needed for the next step in learning). (See next.)

**Feed-forward:** A focus on how to achieve desired future behavior; information that is helpful in charting learning paths forward and in closing the gap between present performance and performance goals.

**Mastery Mindset:** A core belief that one can become smarter and more capable through one's efforts that translates into learning goals and greater persistence in dealing with challenges (often viewed as a chance to learn something new). When people do not hold a mastery mindset, they tend to focus on performance goals, how they look in response to the challenges, and ego-protective behaviors, rather than on gaining actual competence.

**Metacognition:** The process of thinking about one's thinking, and how to make it more expert via awareness and monitoring of how it changes over time or in response to new information. It includes an awareness of thinking and an intentional focus on one's thinking processes; the ability to assess one's thinking; and higher-order thinking skills involved in considering the properties, processes, and characteristics of one's thinking. Metacognition cannot timeshare with thinking. It can be done only in a serial manner in a back-and-forth process of thinking and reflecting. It can include thinking about one's memory, dividing main tasks into smaller ones, managing time for tasks, focusing on specific tasks and suppressing distractions, and allocating mental energy to solve problems strategically.

**Self-Regulated Learning:** Learning that is regulated by learners as they attend to their goals, motivations, cognition, physical state, and feelings. They manage these strategically. Additionally, they manage contexts around them to improve their learning context, including rearranging physical spaces, impacting social and emotional spaces, using their friends' minds well, managing up to get what they need from supervisors to do well, and so forth.

**Transfer:** Refers to taking knowledge learned in one context and applying it to another context/situation. It could be a similar context in terms of the surface level characteristics or it could have deep level similarities that are not obvious at first and require deeper examination of the underlying structures of a task or concept.