



The University as a learning organization : developing a conceptual model
by Becky Hampton Smith

A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Education
in Education

Montana State University

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Abstract:

In recent years, new theories that define a learning organization (Senge, 1990) have been proposed (Senge, 1990 & 2000; Martin, 2001; Tierney, 1999; Aubrey & Scott, 2000) as an organizational model for evolutionary change and in response to crisis in universities. However, no models of the university as a learning organization were found.. The purpose of this study was two-fold: 1) to develop a conceptual model of the university as a learning organization and 2) to conduct a case study of a university to refine and validate the relevancy of the conceptual model.

A conceptual model was developed using Senge's (1990) five disciplines of a learning organization: Personal Mastery, Shared Vision, Team Learning, Mental Models, and Systems Thinking. Each of the disciplines was defined by four levels of institutional involvement: 1) essence or value (state of being or mastery of a discipline) as the core; 2) principles or policies (guiding ideas or insights); 3) practices ("what is done"); and, 4) outcomes (expected results if a university was a learning organization).

Twenty-five University and State leaders were purposively chosen to represent various levels of the University's governance structure. Interviews were conducted using an interview protocol developed to explore the existence and relevance of the components of the conceptual model. An audit of the study's data collection processes and interpretations confirmed the "reasonableness" of the findings.

Findings of the study included: 1), Components of the conceptual model were present in the University and valued by the interviewees; 2) Reflection was added as a sixth discipline to the model; 3) Lack of clarity about the connection between organizational health and organizational/individual outcomes; and, 4) Perception of faculty isolation and lack of involvement with the organization. The last two issues should be validated through future research as their existence would have implications for further refinement of the model.

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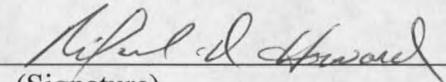
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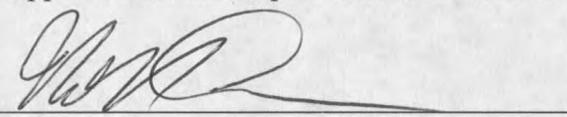
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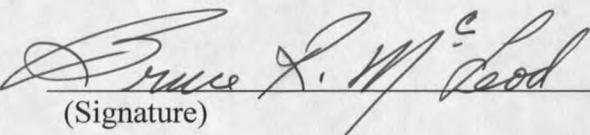
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ABSTRACT

In recent years, new theories that define a learning organization (Senge, 1990) have been proposed (Senge, 1990 & 2000; Martin, 2001; Tierney, 1999; Aubrey & Scott, 2000) as an organizational model for evolutionary change and in response to crisis in universities. However, no models of the university as a learning organization were found. The purpose of this study was two-fold: 1) to develop a conceptual model of the university as a learning organization and 2) to conduct a case study of a university to refine and validate the relevancy of the conceptual model.

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Findings of the study included: 1), Components of the conceptual model were present in the University and valued by the interviewees; 2) Reflection was added as a sixth discipline to the model; 3) Lack of clarity about the connection between organizational health and organizational/individual outcomes; and, 4) Perception of faculty isolation and lack of involvement with the organization. The last two issues should be validated through future research as their existence would have implications for further refinement of the model.

CHAPTER 1

INTRODUCTION

Background

While many leading organizations are using these integrative approaches to becoming learning organizations, our “organizations of learning,” academic institutions, seem to be more resistant to becoming learning organizations themselves (Scott, 2000, p. 17).

As we let go of the machine models of work, we begin to step back and see ourselves in new ways, to appreciate our wholeness and to design organizations that honor and make use of the totality of who we are (Wheatley, quoted by Scott, Spring 2000, p. 8).

How are organizations designed that honor and make use of the totality of its members? Applying Senge’s (1990) learning organization principles to an organization offers individuals the opportunity to create work environments that maximize individual and organizational potential and performance. The focus, however, has been on building individual capacity, not organizational design, a stumbling block for many organizations. Universities, or “organizations of learning” (Scott, 2000, p.17), would seem to be the organization mostly likely to epitomize what it means to be a learning organization—a place where its members maximize their own learning, creativity, potential, and organizational performance. Yet, as noted, universities, while creating learning opportunities for students, have not been able to create an environment for its own

members that embraces or maximizes the potential within its own organizational system (Senge, 1994).

Senge (1990) presented a model of a learning organization in which he articulated a set of processes that create the capacity for maximizing individual potential within organizations. He outlined a set of disciplines that organizations could put into place to build individual and organizational capacity for becoming a learning organization.

Definitions of the five disciplines from Senge's most recent book, Schools that Learn (2000), include:

1. Personal Mastery - Discipline that requires an awareness of one's personal vision and current reality and practices that support movement towards creating and enacting results based on that vision (p. 59).
2. Shared Vision - Commitment by members of the organization to a vision of what the group wants to create for the future incorporating individual aspirations (p. 72).
3. Mental Models - The images, assumptions, and stories carried around in one's head about the way the world or environment is viewed. They are usually tacit and invisible unless brought to the surface (p. 67).
4. Team Learning - The ability of the members of an organization to see and respect other members, their purpose, and current reality, and "establish some common mental models about reality" (p. 74).
5. Systems Thinking - The capacity to recognize the connections, linkages, structures, and behaviors inherent in a particular system (p. 78). For a more

detailed description of a continuum of system thinking practices and “views of the nature of a ‘system’” (p. 73), see the literature review in Chapter 2.

Senge acknowledges that building the capacity of individuals, rather than organizational design, has been a major focus of the learning organization movement (phone message, 2002 via Jean McDonald). Tierney’s (1999) contention is that the learning organization framework is a good fit for the postsecondary organizations that need a “change-oriented structure that focuses on responsiveness” (p. 3). Building an individual’s capacity can enhance the capability of individuals and organizations to respond more effectively to internal and external changes and achieve the results desired by the individual and organization, which is at the heart of becoming a learning organization (Senge, 1990, pp. 139, 141).

In Tierney’s description of the university as a learning organization, there is an assumption that, “when leaders pay attention to process and create the conditions under which people are able to perform better, a twofold payoff occurs; the organization is more likely to reach its goals and people are more likely to feel good about themselves and the organization” (1999, p. 56). The learning organization theory challenges the 17th century Newtonian view (studying the parts leads to understanding the whole) of the organization and offers a new set of metaphors for our public and private organizations. During a lecture at Yale (1998), Senge described the educational system as a living organization defined by relationship and connection rather than by parts and things as in the Newtonian 17th century machine model (p. 54). For too long, educators have allowed this 17th century machine model (Wheatley, 1999) to drive the processes of educating and

being educated. This has manifested itself into a focus on parts separate from the whole, fragmentation, boundaries, control, and dehumanization of the individual within educational organizations. The use of new metaphors can serve as the foundation for developing new organizational models (Senge, 1998). Wheatley underscores the concept of relationship by stating:

When we view systems from this perspective (attention given to relationships within those networks), we enter an entirely new landscape of connections, of phenomena that cannot be reduced to simple cause and effect, or explained by studying the parts as isolated contributors. We move into a land where it becomes critical to sense the constant workings of dynamic processes, and then to notice how these processes materialize as visible behaviors and forms (1999, pp. 10-11).

This supports what Senge has emphasized in the collaborative development of the learning organization. He says it is important to ask tough questions such as, "Why is this system like this, and why do people behave the way they do? What are the underlying assumptions that drive human behavior? What is most telling in watching how the system works and noticing what people do?" (p. 54).

How would a university begin to address Senge's (1998) questions? Wheatley suggests a roving conversation with members of entire campuses about who they are, who they serve, what is possible with the present resources, and who they can be.

Organizational structures emphasizing relationship, connection, and creativity are emerging as self-organized systems that better support individuals and the collective learning community (Katz, 1997). Wheatley says that making sure the organization knows itself is one of the most critical roles for leaders in higher education (p. 1).

Scholars such as Duke (1999), Martin (1999), and Senge (2000) are calling for change in universities using the learning organization principles and, while it may resonate emotionally, it has been difficult to conceptualize how a leader might actually “design” such an organization capitalizing on what is and what can be for both the individual and the organization. There does not appear to be a conceptual model for universities as learning organizations in the literature. Howard says it well when he states, “having a conceptual model allows us to look at the ‘completeness’ of our professional knowledge and to reflect on what we know and what we do not know” (McLaughlin & Others, 1998, p. vi).

Problem Statement

The problem addressed in this study was that there did not appear to be a conceptual model of a university as a learning organization. A conceptual model was needed to create a visual representation of the university as a learning organization for further study.

Purpose Statement

The purpose of this study was twofold. First, a conceptual model of a university as a learning organization was developed and described by the researcher according to the literature. Part two was to conduct a case study of Montana State University’s leaders’ perceptions of MSU-Bozeman using the learning organization theory and to compare the findings to the conceptual model. The conceptual model was then refined based on those

findings of the study.

Significance of the Research

Four themes emerged in literature supporting the need to create this conceptual model and conduct a case study. Briefly, they are: 1) the proponents of learning organization theory are suggesting that universities become learning organizations; 2) the traditional university is being challenged from critics inside and outside the organization; 3) trends such as technology, globalization, etc., are putting demands on universities to change; and 4) since our mental models are usually tacit but shape our behavior and performance, making those mental models explicit may provide insight about the university system and how it impacts its members.

First, Awbrey (1998) defends the need for universities to consider becoming learning organizations for the following reasons:

the need to engage in consideration of fundamental questions of organizational change, the times demand it, for our students and our employers, for an energized, committed faculty, staff, and administration, to manage change, for improvement, for the long range (p. 8).

While those proposing that universities become a learning organization, a conceptual model of a university as a learning organization does not exist in the literature:

Other scholars supporting the notion that universities need to become learning organizations with new metaphors and meanings include Duke (1999), an Australian scholar, and Martin (1999). Martin wrote a book about the "learning university" and uses the learning organization literature as a guide for improvement, and as a lens for weighing

the competing demands. While he discusses processes and ways of implementation, a conceptual model was not developed or used for testing the actual process of "becoming a learning organization" or contrasted to the existing structure of a university.

Proponents of universities becoming learning organizations have come from within academia as well. For example, at Wheaton College the attempt to become a learning organization began by discussing personal mastery as it related to one's work.

Questions that a core group were asked to address included:

1. In what ways have you grown/changed/developed over the last several years (e.g., new perspectives, more openness, greater self awareness, etc.)?
2. How has that shift affected the way you approach your work at X? In positive ways? In negative ways?
3. Apply the same questions but change the frame of reference from you to your department.
4. What growth opportunities are available in the foreseeable future for you, your department?
5. How might these affect your work, our work together? (Braun, e-mail message, 1/15/99).

While the implementation of part of this process had value, it did not provide a conceptual model of the university as a learning organization incorporating all five disciplines and a true systems perspective (Senge, 1990).

Second, scholars called for new ways of thinking about the traditional university. For example, in the section "On the Path to a Different University," Scharmer and Kaufer

(2000) present seven theses that challenge the traditional university by asking 12 universities world-wide, "what does society need universities for?" (pp. 1-3). Duke (1999) saw the emergence of lifelong learning and learning societies as major challenges and opportunities for traditional universities. While the learning organization framework offers the opportunity for universities to develop the members' capacity to create the organization of their choice to maximize their potential, there have been no models or studies conducted to test whether this approach is desirable or feasible for universities. The findings of this study will be utilized to refine the conceptual model of a university as a learning organization for further testing. This is a model representing the diverse and multifaceted views of what the university is compared to the conceptual model of the university as a learning organization. This could lead to further studies and dialogue about how universities embrace or resist change as a system and how the system might better serve its own members.

Third, universities are challenged to meet a changing society and student population often driven by trends in technology, globalization, the diversity of students, expectations of the students, and expectations/needs of employers (Martin, 1999). A conceptual model of the university as a learning organization provides an opportunity to look at the learning organization framework compared to leaders' current mental models of a university and may offer insight about how the university as a whole responds to trends and demands.

As an example, employers want people who know how to learn, have self-awareness, communicate effectively, and can adapt to change (Brew, 1995). This is a

challenge not only for universities as the producers of employees but for members of the institution itself. Information technology, the diversity of the student population, international influences, new ideas about knowledge, decreasing salaries and worsening work conditions all contribute to the urgency of developing organizational members equipped to deal with these challenges (Brew, 1995). It is also felt that individuals need to take more responsibility for their own development and that the process itself needs to balance the needs of the individual and the organization (Brew, 1995). The learning organization framework addresses the individual and organization, but without a conceptual model or comparison to a university's current view of itself by its leaders, it is difficult to assess the efficacy or approach to creating or designing a desired future for the organization and its members.

Fourth, conducting a study that compares a conceptual model of the university as a learning organization to leaders' current mental models of that university system may provide valuable information for all stakeholders of that system. In Schools that Learn, Senge notes that uncovering the diverse mental models represented throughout a system by its members can be a first step to understanding a system and the human behavior expressed in response to that system. A compelling argument for identifying university leaders' mental models as they compare to a learning organization model states that, "because mental models are usually tacit, existing below the level of awareness, they are often untested and unexamined. They are generally invisible to us—until we look for them" (Senge, 2000, p. 67).

This can become one of the learning organization tools that Scott (2000) talks about in combating fragmentation, compartmentalization, and “isolation in life, learning, and in the workplace” (pp. 2-3). Making mental models explicit as compared to the conceptual model can aid in understanding complex issues that impact the university, like diverse and demanding stakeholders, critics inside and outside the academy, crises that cause painful disconnections throughout the system, and the need to communicate the agenda and values across disciplines and to society (Scott, 2000).

This case study and subsequent development of a refined conceptual model of the university as a learning organization can become a guide for university system members desiring more knowledge and understanding about the system in which they function. A university's lack of clarity about itself has been criticized as a barrier to communicating effectively with its stakeholders and members. Oakley (1997) says it best with the following quote, “...among the obligations we do have to the larger public ‘beyond the boundaries of the academy’ is that of explaining ourselves, of conveying on this matter an accurate picture of the way in which we ourselves allocate our time, energies, and resources, as well as the reasons underlying the particular balance struck in the allocation between teaching and research. But in order to do that, we ourselves have to be clear about the issue. And I am not sure that we are” (p. 56). In The Kept University, Press and Washburn (2000) concur with Oakley by suggesting that universities could do a better job of preserving public support for higher education without succumbing to privately funded research agendas by private funding sources.

In summary, conducting this study first added to the body of literature on learning organizations by looking at the university as a learning organization and provided information toward the creation of a conceptual model for further testing by proponents and critics. Second, the findings of this study suggested how the conceptual model compares to the current reality of a university system, and create further opportunities for dialogue and study in response to demands for change. Third, this study provided an opportunity to look at a conceptual model of the university as a learning organization compared to leaders' current mental models of the university system and may offer insight about how different levels of a university respond to trends and demands. Fourth, a system-wide study can provide valuable feedback about leaders' invisible, or tacit, mental models of the university system as compared to a conceptual model of the university as a learning organization. This can be informative for the stakeholders of that system as well as for the members of the university system itself, which could lead to further study or new directions in research. The conceptual model of the university as a learning organization for the purposes of this study is outlined below.

Conceptual Model of the University as a Learning Organization

The conceptual model for this study was developed from the literature on learning organizations. It is specifically based on Senge's five disciplines in The Fifth Discipline (1990), the visual representation in Appendix A, and The Fifth Discipline Fieldbook (1994). Lucas, in "Mapping Mental Models," states that by mapping mental models, the graphic representation accomplishes the following: it unleashes the possibilities, the

knowledge one has and didn't know it; and it provides a basis for analyzing the similarities and differences between varying mental models (Senge, 2000).

In Beer's Brain of the Firm (1994), the autonomic nervous system is outlined in detail to describe the natural way that a living system communicates. Building on that metaphor, Beer builds a simulated model of the organization based on the same biological principles. In describing the behavior of a viable system, Beer states that he had a revelation that would not have occurred "until I had the model" (p. 233).

Roberts, Ross, and Kleiner (Senge, 1994) describe behaviors that the researcher has evolved into a model, which was modified as the participants in this study measured themselves against this standard. as the foundation for designing a workable model in higher education. Quoting directly, "In a learning organization...

- a. People feel they're doing something that matters—to them personally and to the larger world.
- b. Every individual in the organization is somehow stretching, growing, or enhancing his capacity to create.
- c. People are more intelligent together than they are apart. If you want something really creative done, you ask a team to do it—instead of sending one person off to do it on his or her own.
- d. The organization continually becomes more aware of its underlying knowledge base—particularly the store of tacit, unarticulated knowledge in the hearts and minds of employees.
- e. Visions of the direction of the enterprise emerge from all levels. The responsibility of top management is to manage the process whereby new emerging visions become shared visions.
- f. Employees are invited to learn what is going on at every level of the organization, so they can understand how their actions influence others.
- g. People feel free to inquire about each others' (and their own) assumptions and biases. There are few (if any) sacred cows or undiscussable subjects.
- h. People treat each other as colleagues. There's a mutual respect and trust in the way they talk to each other, and work together, no matter what their positions may be.

- i. People feel free to try experiments, take risks, and openly assess the results. No one is killed for making a mistake (Senge, 1994, p 51).

The conceptual model is the ideal model of a learning organization or representation of what could be if an organizational member could create a great or quality organization of choice (Senge, 1994). The model served as the focal point for the interviews with the participants from the different levels of MSU-Bozeman. The schematic representation of the "Conceptual Model of the University as a Learning Organization" follows (Figure 1). (The detailed model presented can be found in Chapter 3).

Research Question

How does a conceptual model of a university as a learning organization compare to Montana State University-Bozeman? How do the core values, policies, practices, and outcomes manifested in MSU-Bozeman compare to those that one would expect to find in a learning organization as outlined in the conceptual model of the university as a learning organization? What do the case study findings suggest for refinement of the conceptual model?

Definition of Terms

The definitions for the purposes of this study are listed below. Other terms and concepts are further defined in the literature review.

Learning Organization: "Where people create the capacity to achieve the results they truly desire, where new ways of thinking are nurtured, where collective aspirations are set free, and where people are continually learning how to learn" (Senge, 1990, p.3).

Fifth Discipline Learning Organization Model: Senge's definition of a learning organization was used, which is a place or environment that creates the opportunity for learning by individuals who have potential to create learning for the organization by practicing the five disciplines: 1) Personal Mastery, 2) Mental Models, 3) Building Shared Vision, 4) Team Learning, and 5) Systems Thinking. Senge recommends that organizations commit to the integration of all five disciplines to realize the full impact and potential (Senge, 1990, pp. 5-13).

Organizational Learning: Organizational learning is about the processes involved for the individual, the group, and the organization in creating, acquiring, and transferring knowledge for the improvement of the organization (Argyris, 1999).

System: A system is a set of processes that are made visible in structures that are temporary. Systems influence individuals and vice versa, "individuals call forth systems" (Wheatley, 1999).

Leader: DePree's (1989) definition of the art of leading is "liberating people to do what is required of them in the most effective and humane way possible and is the 'servant' of his followers in that he removes the obstacles that prevent them from doing their jobs...the true leader enables his or her followers to realize their full potential" (p. xx).

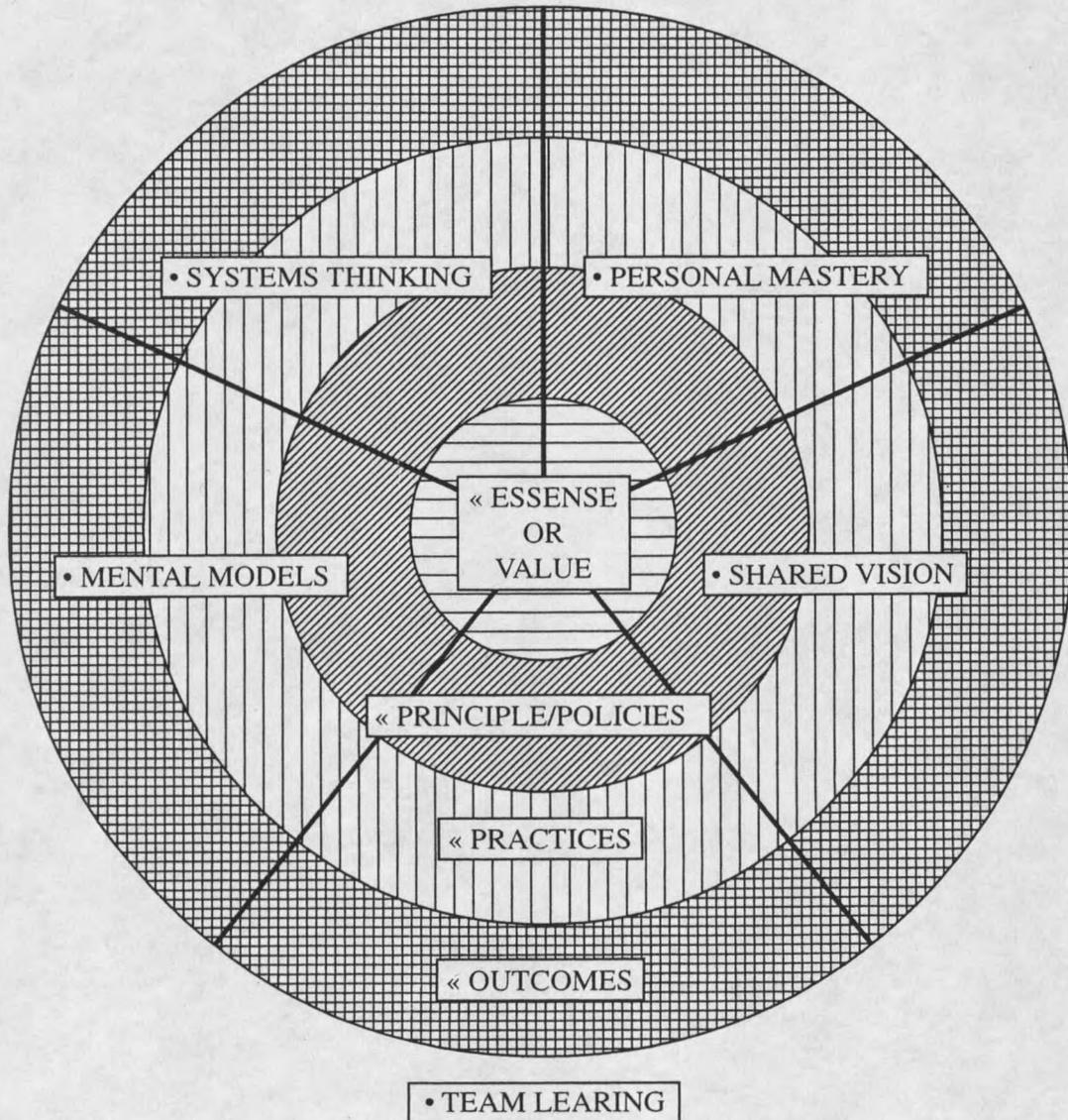
Figure 1

A CONCEPTUAL MODEL OF THE UNIVERSITY AS A LEARNING ORGANIZATION

The Five Disciplines of a Learning Organization

- 1. Systems Thinking
- 2. Personal Mastery
- 3. Shared Vision
- 4. Team Learning
- 5. Mental Models

- ☐ ESSENCE OR VALUE
- ▨ PRINCIPLE OR POLICIES
- ▤ PRACTICE
- ▧ OUTCOMES



Model: A visual representation, usually simplified or miniature, of a complex concept or theory that operates as a standard for comparison (Vinton, 2002, paraphrase).

Metaphor: Wheatley (1999) says it is, "a hypothetical description of how to think of a reality we can never know" (p. 15).

The Researcher

The researcher graduated from Baylor University in 1976 with a B.S. degree. In 1993, a Master's in Public Administration with a Minor in Business Management was completed at Montana State University. Professional experience and graduate studies have focused on organizational change and design since 1986. As a participant of Dr. Fraser's (1996, Austin, Texas) year-long strategic planning course, The Fifth Discipline (Senge, 1990) was on the required reading list. The researcher conducted an independent study with Dr. Karen Vinton contrasting Senge's work with classic organization development literature. In that process, the researcher met Dr. Senge and was invited to join his international organization, "Society of Organizational Learning (SoL)" by submitting written work and filling out an application. Acceptance into the organization has led to annual and biannual meetings and courses with researchers, corporations, and consultants world-wide in the field of organizational learning and learning organizations since 1997.

