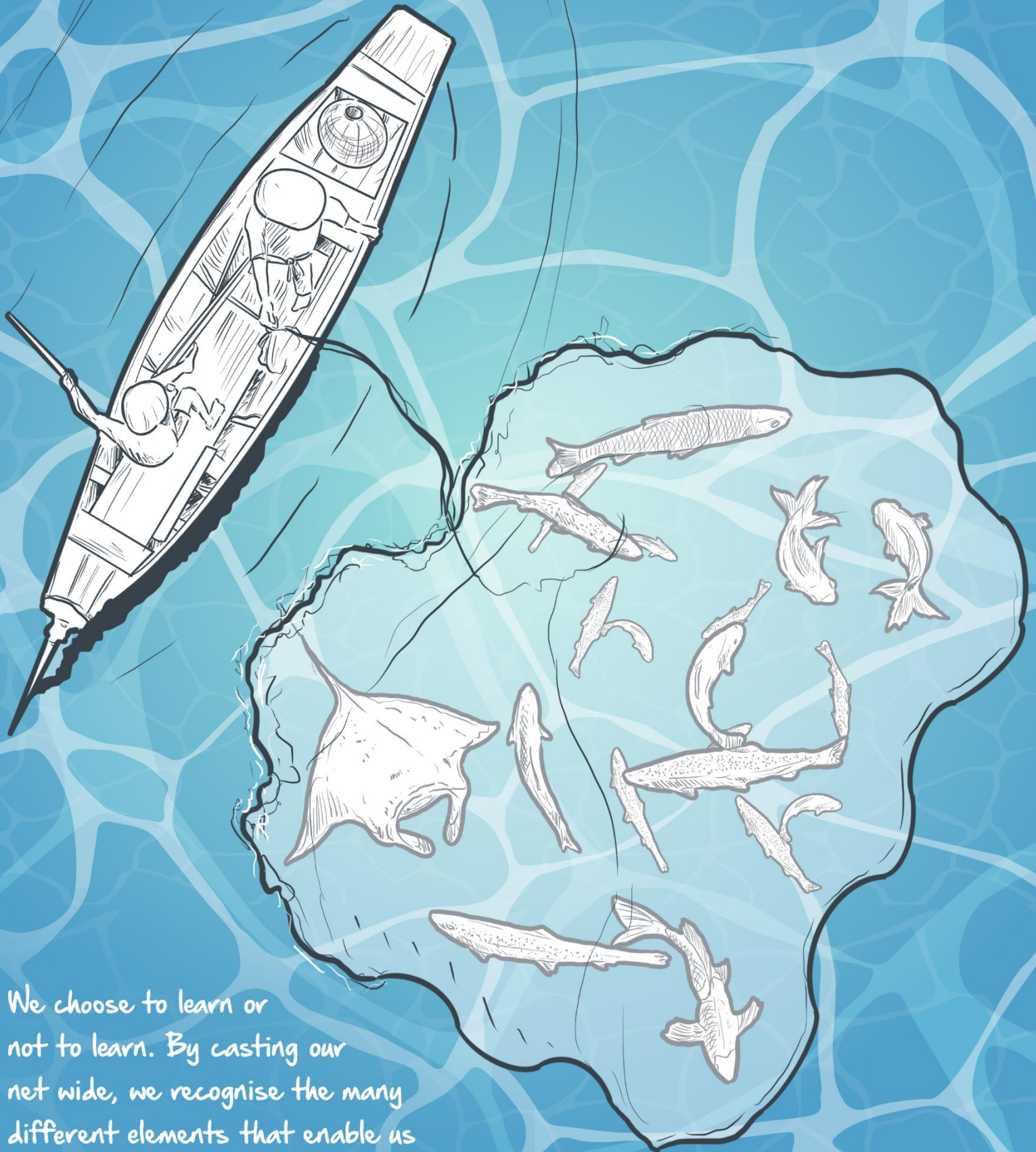


Chapter 4: The Learning Organisation



We choose to learn or not to learn. By casting our net wide, we recognise the many different elements that enable us to learn more and help us develop our learning capability.

4

THE LEARNING ORGANISATION

“Live as if you were to die tomorrow. Learn as if you were to live forever.” Mahatma Gandhi

Learning organisations are places where people are consciously encouraged to continually expand their capability; where critical curiosity, creativity and collaboration are nurtured; and where everyone involved is committed to doing things better. This chapter provides insights about how to bring about effective life-long learning at individual, team and organisational levels. Overviews are given about globally recognised models of learning, including links to relevant neuroscientific breakthroughs. We explain the basis of our distinctive approach at Caplor Horizons; this stems from research into life-long learning and it is linked to our “Caplor House” model.

The External Environment

“Do the best you can until you know better. When you know better, do better.” Maya Angelou

Effective lifelong learning is very important to individuals, teams and organisations; moreover, to communities and to humanity as a whole. So many of us are doing the best we can. Yet how can we respond to Maya Angelou’s challenge to “do better”?

Education and learning can be defined separately though are, of course, linked. One of the Sustainable Development Goals (SDGs) is “Quality Education”. The United Nations explain that the Goal is about “ensuring inclusive and quality education for all and promoting life-long learning”.

Education and learning are vital if we are to achieve a sustainable future. They are fundamentally important in terms of greater inclusivity, reducing inequality and reaching gender equality.

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An enlightened approach is required. One that is available to everyone and starts at a young age. As Malala Yousafzai contests: *“I truly believe that the only way we can create global peace is through not only educating our minds, but our hearts and our souls”*. Furthermore, considering the dire consequences of patriarchal societies around the world and the grave implications for gender equality that arise from this, she contests: *“how can we succeed, when half of us are held back”*.

We live in remarkable times. The backdrop of the environmental crisis, that requires transformational action on climate change and biodiversity loss, creates an imperative for learning, thinking and acting differently.

The health emergency is having profound consequences too. In 2020, as the Covid-19 pandemic spread, many countries announced the temporary closure of schools, impacting more than 90 percent of students worldwide. By April 2020, approximately 1.6 billion children and young people were out of school according to Unicef.

The accelerated shift towards fewer people being based in offices is having major consequences. A great focus now exists on virtual working and learning along with the implications of this. For instance, in a London Business School webinar series in 2020 (related to the pandemic), Lynda Gratton (2020) spoke about the revolution in virtual working and learning, and how this brings about significant opportunities, whilst Herminia Ibarra (2020) relayed the often challenging implications for diversity and inclusion.

We live in times where ingrained attitudes and behaviours are being challenged. For instance, the Black Lives Matter movement. These and other current and compelling contextual considerations need to be kept in mind as we consider effective life-long learning and how things might be done differently and better.

The not-for-profit sector plays a critical role in bringing about change and effective life-long learning is at the heart of sustaining movements and organisations. Many of our clients and partners have cutting edge approaches to this. That is why at Caplor Horizons we always prioritise attention to learning and reflection.

The Observatory

“Any change starts from unlearning what you already know.” Srishti Gupta

The notion of the learning organisation has long been something of a cliché. Many have attempted to describe the learning organisation, but relatively few have made it work in a sustainable way. Real learning organisations are learning cultures. It is in their DNA. Individuals and teams participate in continuous learning. This in turn leads to the organisation continuously learning and changing for the better.

The concept of the “learning organisation” came to prominence in the late 1980s and early 1990s as rapid technological advances, changing demographics, early globalisation and increasing competition within established industries required businesses and organisations to reflect on, and challenge, established practices.

Original thinking by Mike Pedler, Tom Boydell and John Burgoyne in the late 1980s recognised the need for organisations to facilitate the learning of all their members and continuously transform themselves. In the 1990s, Peter Senge developed the notion of a learning organisation in his book *The Fifth Discipline* (1990), which conceptualised organisations as dynamic systems, in states of continuous adaptation and improvement. His definition of a “learning organisation” is still used today. Learning organisations are:

“...organisations 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 together.”

For Senge, there are five interrelated disciplines that leaders should develop in order to create a learning organisation. These are:

- **Creating a shared vision** – A shared vision needs to be authentic, shared, and clear so that people can feel engaged in the actions needed to achieve it. It is much better if the vision is developed through a shared collaborative process, and not dictated from the top.

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- **Changing people's mental models** – Leaders should encourage openness and awareness of organisational culture and norms by turning the mirror inward and “bending the beam of observation” back on the self. Seeing how we see the world enables us to scrutinise our assumptions and norms. This then, in turn, enables change and openness to new ideas and ways of working to emerge through dialogue.
- **Personal mastery** – Organisations are built on the strengths of their people. Everyone in the organisation is responsible for continuous learning and achieving “mastery” in their area.
- **Team learning** – In addition to the importance of individual learning skills is the need for effective teamwork to achieve organisational learning. Effective teamwork needs team members to be willing to learn from their colleagues, to be open to others' ideas, to communicate effectively, and to build trust. Teams need to encourage the free flow of ideas, suspending individual assumptions in order to genuinely think together.
- **Systems Thinking** – Senge encourages a systems view of organisations in order to understand and recognise patterns. This can be achieved by viewing the organisation holistically as though it were a living organism, rather than a series of small, unrelated manageable parts. Too often we concentrate on the silos of the organisation that divide us into functions and departments, or the “slabs” of the organisation which Henry Mintzberg (2015) has argued divide us by hierarchical levels.

Senge believes that systems thinking is vital for long-term organisational sustainability, lamenting that many leaders are driven too much by short-term narrowly focused action:

“The systems viewpoint is generally oriented toward the long-term view. That's why delays and feedback loops are so important. In the short term, you can often ignore them; they're inconsequential. They only come back to haunt you in the long term.”

Like many others, Otto Scharmer (2018) argues that leaders are facing emerging complexity in today's world. This, he says, can usually be recognised by the following three characteristics:

1. The solution to the problem is unknown
2. The problem itself is still unfolding
3. Who the key stakeholders are is not clear

This is very similar to the VUCA (Volatile, Uncertain, Complex and Ambiguous) concept. Scharmer argues that most approaches to organisational learning are based on the view that the source of learning is the past. This, according to Scharmer, may no longer be helpful:

“But what if the future is different from the past? What if one’s past experiences aren’t relevant to the emerging challenges? Is it possible, instead, to learn from the emerging future?”

This viewpoint is supported by Liz Wiseman (2014) who says:

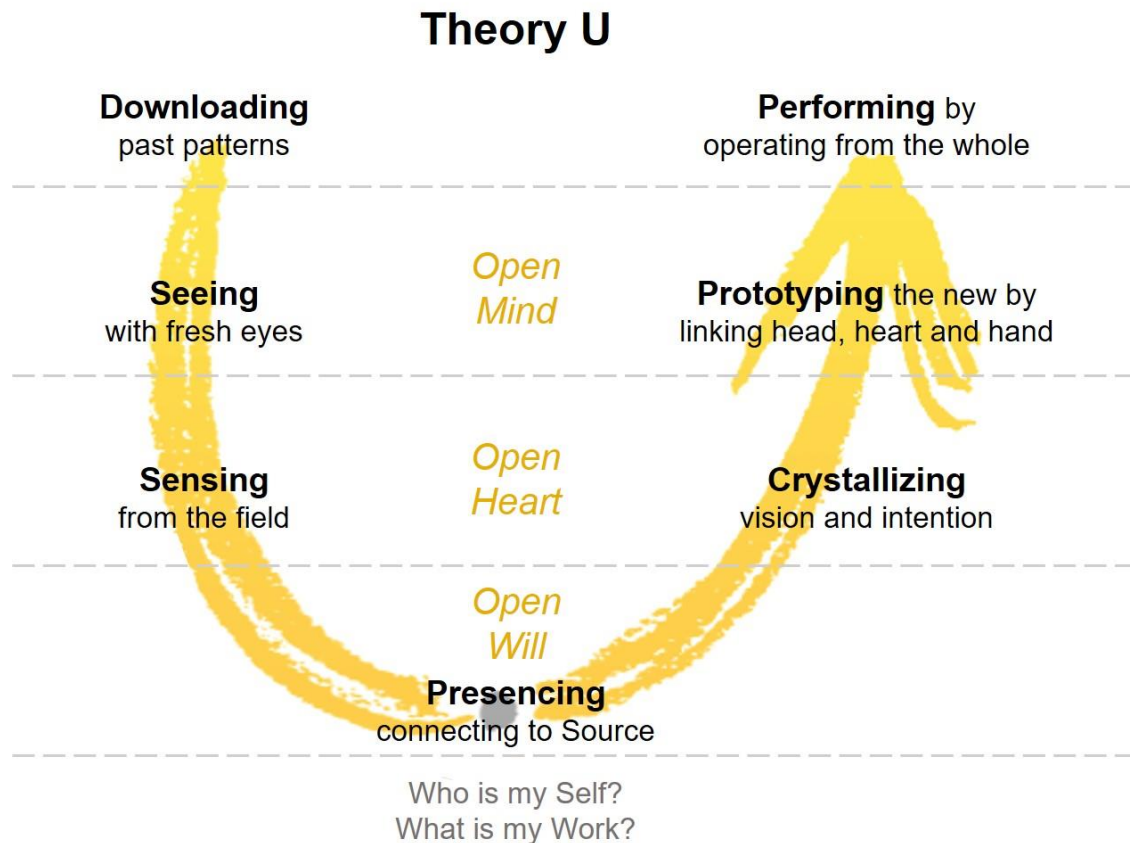
“In a stable world, experience is an asset, but in a VUCA environment experience can be a burden as strategies grow stale... The knowledge economy is moving so fast that those who want to stay relevant need the ability to forget what they know and open themselves to learning from everyone and everything around them.”

Senge and Scharmer, influenced by David Bohm (1994), both highlight the etymological root of the word leadership – “leith” – meaning to “step across a threshold”. This is connected to the idea of “unlearning” or “letting go” of our narrow preconceptions or egocentric perspectives on an issue or problem. It is imperative that leaders shift their mindsets from a reliance on knowledge built on past experiences to focus on future thinking, and continuous learning and unlearning.

This is supported by Ann Alder (2010) in her book “Pattern Making, Pattern Breaking”. In this she encourages us all to challenge our patterns and experiment with new approaches. She explores the ways in which educators and facilitators can work to help people build those patterns that will be most useful to them, and also how you can enable people to break patterns; to help them move on in the learning process by recognising and rejecting long-held patterns of behaviour or assumptions that are unhelpful or redundant.

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In line with these ideas, Otto Scharmer (2007) and his colleagues at MIT developed “Theory U”, a cutting-edge theory of learning for leaders. Theory U has been developed to enable leaders to shift from learning from the past to “learning from an emerging future”.



Theory U. Source: Presencing Institute (2020)

According to Theory U, pictured above, the left-hand side of the U is all about “taking off the blinkers”, observing, listening and opening the mind. This first and most important step is to break free from habitual patterns of the past, to move from “downloading” to “seeing and sensing”.

The right-hand side of the U is all about “bringing the new into the world”. This is about co-creating and co-evolving an emerging future, whilst being flexible and resilient to further uncertainties that may arise.

This means that as the world around us changes, leaders need to constantly scan their environments and contexts and be open to new and different interpretations of what they see and feel around them. For more on this read Chapter 5: The Proactive Organisation.

Furthermore, leaders need to get rid of “expert mindsets” which are often adopted and that prevent them from opening their minds to new possibilities and alternatives. These so-called experts can become trapped within the boundaries of the knowledge and assumptions that have served them well in the past, and this can limit creativity and innovation. These ideas are expanded further in Chapter 9: The Worldly Organisation.

An example of this can be taken from the Zen Buddhist story, “Empty your cup”, which highlights the importance of unlearning:

Nan-in, a Japanese master during the Meiji era (1868-1912), received a university professor who came to inquire about Zen. Nan-in served tea. He poured his visitor’s cup full, and then kept on pouring. The professor watched the overflow until he no longer could restrain himself. “It is overfull. No more will go in!” “Like this cup,” Nan-in said, “you are full of your own opinions and speculations. How can I show you Zen unless you first empty your cup?”

This phenomenon was noticed in doctors treating Covid-19 patients. What they “knew” from prior med-school instruction or clinical experience had to be continually disregarded for new ways of comprehending how the disease was emerging. It was hard for most physicians to do this, but essential to saving lives!

The Library

“In vain have you acquired knowledge if you have not imparted it to others.”

Deuteronomy Rabbah

A good way to understand more about the evolution of learning and how we learn is through neuroscience. Clive Hyland is an Advisor with Caplor Horizons and has published books in this field, including “The Neuro Edge” (2017). He also developed “Human Horizons” in collaboration with Haygrove, an international horticultural business, and Caplor Horizons.

According to Hyland’s “Human Horizons” concept, the human brain is divided into four regions: the basal region; the limbic system; the cortex and pre-frontal cortex. The basal region is the oldest part of the brain in evolutionary terms and sits just above the brainstem.

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We learn in the basal system by real-time adjustment to our experience of the environment, for example if you touch a hot pan and burn yourself, you will learn not to touch it again.

The limbic system is located in the central region of the brain. It is sometimes referred to as the mammalian brain and it deals with emotions, memory and social networks. We learn in the limbic area by interaction with others. This is about energetic interchange which allows us to express and play with new ideas and test them out.

The cortex is situated at the top and sides of the brain. It can be thought of as the thinking brain and forms part of the essence of what makes us human. We learn in the cortex by creating new rules which then form new neural circuits. Hence the rational brain's search for clarity.

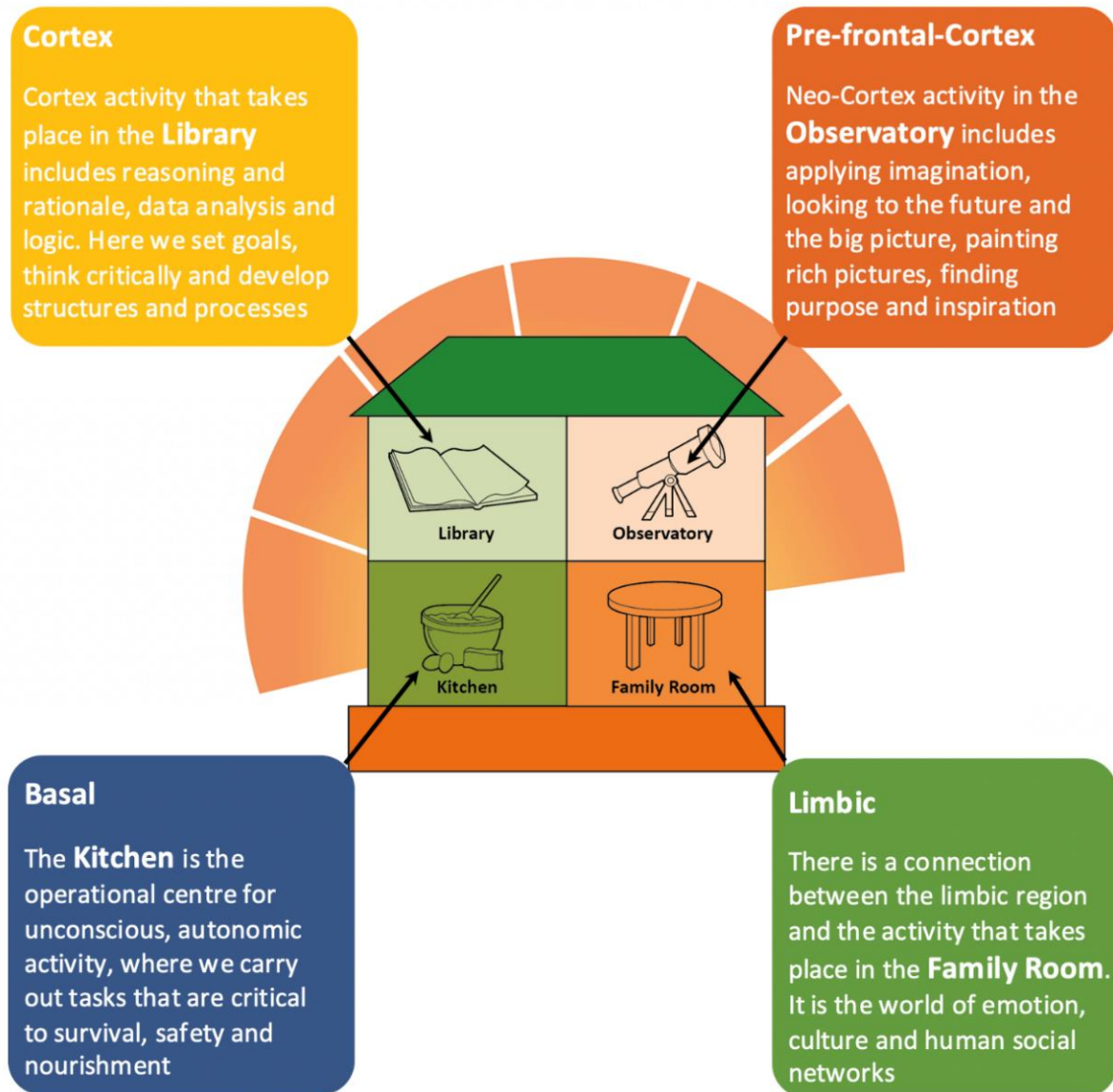
Whereas all mammals have a cortex, only humans have the pre-frontal cortex. The pre-frontal cortex is the centre of our conscious thought and self-awareness. It therefore deserves special attention when we are dealing with matters of behaviour, learning and personal change. Learning happens across the brain, albeit in different ways, whereas reflection occurs only in the pre-frontal cortex.

Both the limbic and basal areas learn at an unconscious level through sensory experience in the moment, whereas the cortex and pre-frontal cortex, by operating at a slower speed, allow us more information to choose our response. The most effective learning involves recruiting multiple regions of the brain.

For more insights into Clive's work, read Chapter 7: The Human Organisation.

It is possible to see the parallels between rooms in the Caplor House model and the four areas of the "Human Horizons" Brain:

- Activity in the Kitchen parallels the basal system, the region of instincts
- Activity in the Family Room parallels the limbic system, the region of feelings
- Activity in the Library parallels the cortex, the region of thinking
- Activity in the Observatory parallels the pre-frontal cortex, the region of purpose and meaning.



Human Horizons and the Caplor House

Hyland also talks about the wider human intelligence of the body and gut, in addition to the brain. The heart is an integrative part of our emotional experience and plays a defining role in accessing confidence and sustaining performance optimisation. The gut directly influences our instincts, although for now it is the area we know least about.

There are some interesting parallels between Hyland’s work highlighting the neural networks and intelligence of the head, heart and gut with Otto Scharmer’s Theory U idea of an open mind, open heart and open will. Both talk about coherence between these different centres and indicate that “peak performance” or being able to move into a generative space at the bottom of the U requires coherence and alignment.

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For example, as Senge puts it:

“when a team becomes more aligned, a commonality of direction emerges, and individuals’ energies harmonize... a resonance or synergy develops, like the ‘coherent’ light of a laser rather than the incoherent and scattered light of a light bulb.”

This implies that individuals need their neural networks to be aligned to enter a “flow state” which can lead to peak performance. Examples of achieving “flow” include when children are deeply absorbed in play or when athletes are in the zone. This connects to the idea that learning organisations need to be aligned in the same way. Each part of the system should be “in tune” or organically related, rather than mechanistically relating to each other like the separate parts of a machine.

The Family Room

“Tell me and I forget, teach me and I may remember, involve me and I learn.”

Benjamin Franklin

No one can learn for us. However, effective teaching, coaching, mentoring and support can help in the learning process. The first step is for both the learner and those supporting learning to understand how we learn effectively and how we can build the capabilities that enhance learning.

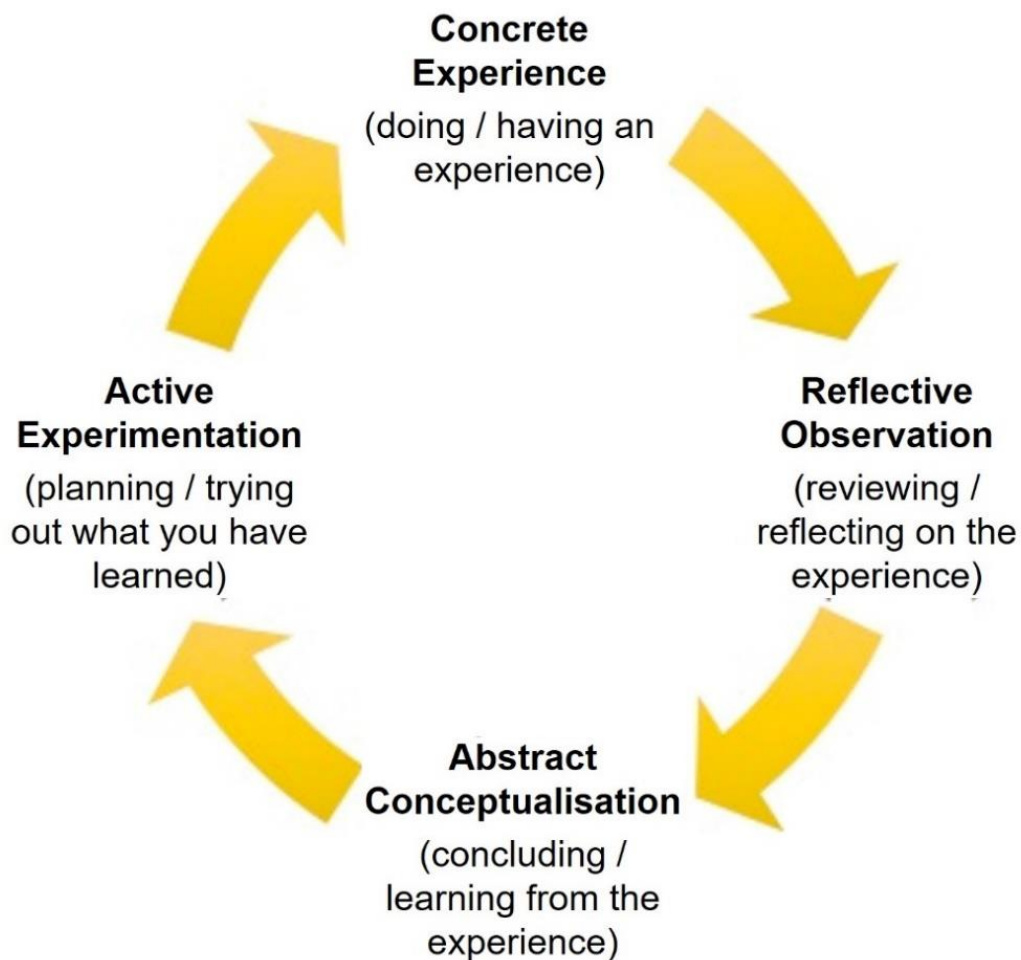
To make learning engaging, it needs to be real and relevant. To learn effectively, we need to be able to understand how what we are learning applies directly to us and our world. Learning is about being creative, generating new ideas through collaboration and enriching our knowledge. It is a two-way process – an exchange where those involved should be regarded as equals.

Most importantly, learning is a continuous journey. It is about looking forward and growing our skills whilst gaining a better understanding of ourselves, others and the world in which we live.

If we are interested in learning something new – like doing a cartwheel, or singing a song, or driving a car – we often combine some theory with a lot of practice and experience. This is

why experiential learning, learning through experiences, is one of the most effective ways to learn. The experiential learning process may be intentional: attending a training programme; or unintentional: learning to put a coat on when it's cold outside!

David Kolb's learning cycle below, shows the four-step process of experiential learning (Kolb and Fry, 1974). He suggests that it involves having a new experience, reflecting on outcomes, conceptualising and choosing options, and experimenting with what you have learned.



Kolb's learning cycle. Source: Learning Performance (2020)

Kolb states that in order to gain genuine knowledge from an experience, the learner must have four abilities:

- The learner must be willing to be actively involved in the experience
- The learner must be able to reflect on the experience

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- The learner must possess and use analytical skills to conceptualise the experience
- The learner must possess decision-making and problem-solving skills in order to use the new ideas gained from the experience

Thus, experiential learning is more than just “learning by doing”. Patrick Felicia (2011) defines it as “learning through reflection on doing”. Reflection is a crucial part of the learning process. It links to Scharmer’s notion of “bending the beam of observation back on the self” and taking a deeper dive into the small self to connect with the bigger self (the whole). The process of reflection is expanded further in Chapter 11: The Reflective Organisation.

Experiential learning is distinct from rote or didactic learning, in which the learner plays a comparatively passive role. Experiential learning allows one to question, challenge and reveal one's blind spots, be more open minded and learn by connecting learning with our lived and personal experiences in an active, not passive, way. Furthermore, the role of emotion and feelings in learning from experience has been recognised as an important part of the experiential learning cycle (Moon, 2004).

Experiential learning makes learning an experience that moves beyond the classroom. It ensures that the learning playing field is a more level and interesting one. In practice, experiential learning should be fun and engaging with everyone being able to access it and develop, no matter what their background. Furthermore, it is important that the learning environment is a safe one. One where people do not feel at risk from fear or failure: they should feel free to express whatever thoughts and ideas they have and be encouraged to do so.

At Caplor Horizons we use a variety of experiential learning exercises in order to mimic real life scenarios for individuals, teams and organisations. These exercises range from puzzles to card games, singing, dancing, and roleplay. We ensure that they are always simple, hands on, versatile across cultures, and relevant to the group. These exercises act as “anchors” which embed the learning and transform the participants’ way of thinking. Groups are encouraged to reflect on their learning experience and apply it to the “real world” after each exercise, thus going through the Kolb cycle of learning.

Other ways to become better learning leaders include:

- Observing positive role models
- Being “thrown in the deep end” e.g. having to teach what you have learnt to others
- Having or being a mentor or coach
- Gaining international or multicultural exposure
- Getting involved in a team-based activity

Your leadership will be shaped by a powerful mix of activities and experiences. Leaders do plan a great deal of their learning, but the balance is learned through opportunistic responses to life events. Some leaders are more “tuned in” to recognising and maximising opportunities for learning from both. As well as containing a balance of both planned and opportunistic learning initiatives, the leadership learning process invariably contains three critical elements – learning from doing (work-based learning); learning from books or courses (ideas and concepts) and learning from people (social interaction).

The Foundations

“When you talk, you are only repeating what you know; but when you listen, you learn something new.” Dalai Lama

The ability to learn effectively is a fundamental leadership requirement and a vital skill as we work towards creating a more sustainable future. But how can we help people to develop their own learning capability?

Caplor Horizons’ distinctive approach to learning was inspired by international research about effective life-long learning, and perspectives from our Advisors, Dr Ann Alder and Dr Geoff Cox, who are both experts in experiential learning.

The Effective Lifelong Learning Inventory (ELLI) research, led by Ruth Deakin Crick, came up with “Seven Learning Dimensions” which offer powerful insights into how individuals learn and how they can enhance their learning capacity. From this we developed our “5Cs of Learning” which are: Commitment, Consciousness, Critical curiosity, Creativity and Collaboration.

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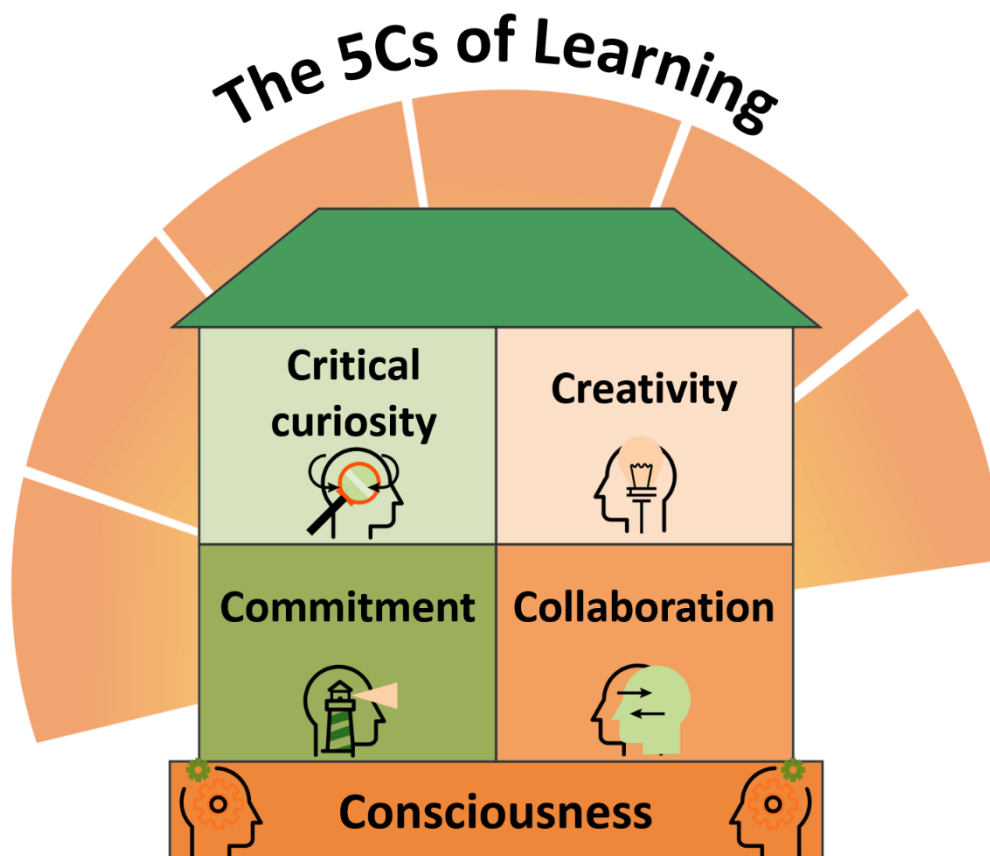
These five dimensions of learning are things that learners can work on for themselves and that facilitators can build into their learning programmes to improve the likelihood of learning being successful.

The 5Cs are designed to help you to think about your own learning and how you can help other people to learn. They can help you to add variety and challenge to your learning and to create a culture and environment in which learning is valued and becomes a part of your everyday activity.



The 5Cs of Learning

The 5Cs of Learning closely relate to our Caplor House model (to understand more about this model, read Chapter 3). We believe that learning is an essential component of each of the rooms, and the foundations, of the Caplor House, and they each have a distinctive style of learning. As with the different areas of the brain mentioned above, the most effective learning involves paying attention to all of the learning styles in each of the rooms.



Learning and the Caplor House

The Foundations: Consciousness

In introducing the Caplor House model for the first time to groups, the early emphasis is on the Foundations and consciousness. Only when people have grasped the fundamental importance of learning to the organisation will the rest of the House be explored. This approach ensures that every person in the organisation is learning-conscious and recognises that you can always learn more and develop your learning capability. Although organisations should provide a space for individuals to learn, it is essential that individuals accept responsibility for their own decision making about what and how they learn. This is a culture within which learning is not the responsibility of particular roles or functions, but is distributed across the whole organisation, creating what is by definition a learning organisation.

Learning is at the foundation of the Caplor House meaning that it should be at the foundation of every programme or intervention you implement.

Library Learning: Critical Curiosity

Learning in the Library is about developing the learning skills of questioning, challenging and seeking meaning. For example, drilling down into subjects, researching arguments and making sense of available information. It also includes using critical thinking to build understanding of complex topics or data, working out the right questions to ask, and building and testing hypotheses to learn.

Observatory Learning: Creativity

In the Observatory the learning skills of creativity and experimentation are developed. Here it is important to show willingness, and encourage others, to take risks and make mistakes as part of the learning process. Other characteristics of learning in the Observatory include looking for new ways of learning, challenging and breaking existing patterns, learning in a holistic way and making clear connections between current learning and future aspirations and goals.

Family Room Learning: Collaboration

Family Room learning involves building strong learning relationships and seeking to understand and empathise with other perspectives. Here we learn with and from others by sharing ideas and experiences. It also includes developing awareness of your emotional reactions to learning opportunities and being able to ask for support from others in dealing with the negative emotions that new learning can bring about.

Kitchen Learning: Commitment

Finally, learning in the Kitchen involves determination and commitment. Improved competence comes from practising and honing your practical skills to achieve specific and tangible outputs. Individuals that learn in the Kitchen are often systematic, driven and resilient.

We encourage organisations to use the 5Cs as a tool to develop their learning capacity and to assess the progress being made.

The Roof

A new focus on developing learning organisations is vital if we are to influence global thinking around sustainability and have an impact on the leaders who will take their organisations forward into the ever-increasing uncertainties and complexities of our twenty-first century world. We aim to contribute to this development by offering a greater understanding of what a learning organisation is, recognising the importance of systems thinking and unlearning in the learning process, and also offering the Caplor House as a tool that helps to achieve this.

To inspire and enable people to deliver a sustainable future, it is imperative that we help build organisations which learn fast and effectively. In building these learning organisations, we must also ensure that we make the walls permeable, so that each separate learning organisation allows its learning to spread out to touch and impact the next organisation within the wider learning community. These different networks can produce greater resilience to the volatility and uncertainty in the environment through shared knowledge and enlightened collaboration.

The Kitchen

Practical steps to becoming a learning organisation

- **Different thinking = different learning** – As unlearning is part of the learning process, use creative, innovative fun ways to challenge assumptions and develop creativity. Use the Caplor House rooms to encourage people to think and learn differently. Experiment with different learning opportunities, experiential learning, learning from the future and collaborative learning to broaden people learning experiences.
- **Develop a culture of life-long learning that permeates every aspect of day-to-day organisational behaviour** – This is a culture within which learning is not the responsibility of particular roles or functions but is distributed across the whole organisation. Such an organisation is a place where people are encouraged to continually expand their capacity, where critical curiosity, creativity and collaboration are nurtured, and where the organisation as a whole is committed to transforming and improving its practices.
- **Ensure that people are enabled and empowered to learn** – Embed opportunities for learning in routine activities through initiatives like shadowing, visits to other parts of the organisation, and team meetings and ensure that space is made to reflect and review the learning that took place. Furthermore, spread the message that it is okay to fail and create safe spaces for learning as failure and experimentation is an integral component of learning.
- **Make learning engaging, real and relevant** – Involve people in their learning process and let them experiment with different ways of learning. Make learning accessible to all. Give time for people to have learning experiences in their work, see it as essential rather than a luxury.
- **Share learning in a holistic and collective way** – Use a systems approach to share learning and information through the organisation as if it were a living organism. And don't stop there. Extend this to other organisations, like organisms in an ecosystem, to impact the wider learning community and improve your collective learning through networked intelligence.

Key messages

- Make learning conscious! Identifying different ways of learning enables learners to adopt approaches that suit them and take responsibility for their own learning. We can use neuroscience (Human Horizons) and the Caplor House to understand more about the different ways and preferences of learning.
- Sustainable learning involves “unlearning” what you already know and observing what is in front of you. It is important to learn with an open mind, an open heart and an open will. Scharmer’s Theory U explains this further.
- Experiential learning is one of the most effective ways to learn. Kolb’s learning cycle shows that effective learning involves having a new experience, reflecting on outcomes, conceptualising and choosing options, and experimenting with what you have learned.

Reflection questions

- Does your organisation embrace different ways of learning and providing learning opportunities across the whole organisation?
- How can you focus on the future to inform the present?
- Does your organisational culture allow for people to experiment, take risks, innovate and fail in order to learn?

Action and impact questions

- How can we support broader and more inclusive approaches to learning across the whole organisation?
- What opportunities can we provide to encourage shared and collaborative learning?
- How can we make the learning in our organisation more conscious to help embed learning?

Further reading

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