

# Gosia Winter



## Reflective Summary of Study: Unit 1

### Sustainable Management Theory: emerging ideas for complexity

In the last 6 months I have been investigating ideas and methods pertaining to sustainable organisational management. My study has not been focussed on any particular setting, but was geared to take into consideration my wish to explore this subject specifically for a primary (elementary) school setting.

My main two tasks as part of this unit were:

- to meet with leading people in this field through intensives and online programs
- to research other key theories and methods on the topic

My focus was on the work of Otto Scharmer and Nicanor Perlas; and although I had the goal of reaching beyond these two in my study, I did not do so to the extent that I had intended. However, I have learnt much and will share this in the reflective paper below.

Much of what I have shared below pertains to the ways in which I put into practise what I learnt, rather than talking about the theories and works at length.

Over this study period, I have been writing a journal about my experiences and the application of the theories I have encountered. This can be viewed at <http://gosia.lindenlion.net/?cat=5> (A password is required to access all posts. Please request one if you are interested).

My mentor for these last 12 months has been Jordan Walker, whose own work has to do with topics of social three-folding and social renewal; cornerstones of the ideas I have been studying. Thank you Jordan for your conversations, support and friendship.

Gosia Winter  
[gosiaghooose@gmail.com](mailto:gosiaghooose@gmail.com)

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## Summary of Texts Studied

Executive Summary of Theory U, Otto Scharmer

- An overview of his book 'Theory U' – outlining key concepts from the book about systemic organisational change.

Theory U, Otto Scharmer

- A handbook for a theory of enacting systemic change within organisations. The central concept is one of engaging the individuals in an organisation in deep dialogue that stimulates positive, systemic change. Stories, diagrams and clearly defined tools (such as the stakeholder interview, case study, etc) make this text practical. It is meant to be applicable to any organisational or social context.

Shaping Globalization: Civil Society, Cultural Power, and Threefolding, Nicanor Perlas

- This book's central concept of social threefolding is well presented for a governmental context, but provides examples of systemic research and application of this theory that make it accessible to a wider audience. Social threefolding is a concept outlined by Rudolf Steiner, intending to allow for the healthy placing of economic fraternity, political equality and cultural freedom within society as a whole.

Notes and writing from Jane Lorand's January 2010 YIP Study Week

- I attended this study week with the idea that I would learn more about economics, but I also learnt much more about organisational management and theory. Lorand's workshops included much information on systemic theory and organisational management. She borrows from many places – this study week was a summary of much of the concepts explored in full in the 'Green MBA' she runs in the United States of America. (<http://www.greenmba.com/>)

Basic Issues of the Social Question, Rudolf Steiner

- In this text, Steiner outlines concepts surrounding the threefold social order, the development of human social consciousness and what is necessary, in his view, to enact real and authentic social change.

## Summary of Meetings, Workshops, Conferences Attended

Global Classroom with Otto Scharmer: 16th/23rd/30th September, 7th/14th October (Online) 2010

- This course offered an outline of some of the concepts of the book 'Theory U' in detail. It included practical assignments, readings and group discussions as well as question and answer time for clarifying the content. The practical assessments were set for participant's varying contexts and were intended to empower each participant to take a leadership role in enacting positive systemic change.

Threefolding Lab and Civil Society with Nicanor Perlas: 12th - 17th October (Sweden) 2010

- A gathering of 10 or so peers around a study week Nicanor did at YIP ([yip.se](http://yip.se)). Our meetings with Nicanor were meant to deepen our already existing understanding and practise of social threefolding in various contexts. Our work included defining our guiding questions, discussing the various projects we were individually working on and defining ourselves as a study group.

U-Lab: 28th January - 3rd February (Switzerland) 2011

- This meeting was organised and led by a group of peers during the week leading up to an Agricultural conference at which Otto Scharmer was presenting. Unlike the Threefolding Lab with Nicanor, Scharmer did not join us during this peer meeting. It was created to work experimentally with the concept of the 'U-Process' outlined in the book 'TheoryU'. When in a smaller group, I was able to be part of a case study (as outlined in the book), which gave me a practical insight into a process I had not experienced before. After this meeting I was invited to a town near Milan, Italy to be part of a dance and music project. While there I used what I knew of the U-process to help that group through such a process to clarify their direction.

## **Reflecting on the Practical Application of Study Themes**

### A Difficult Professional Relationship

While I was taking part of the Global Classroom with Otto Scharmer in September and October 2010, I was confronted by a difficult professional relationship with a teacher at my school. I felt fired up, irritated and impulsive and knew that I could not go on any longer without saying anything to this person. What made me very worried were re-emerging signs of an anxiety disorder I had experienced before; I had to act.

One of the points Otto made during the online program was that to enact change within an organisation, there needs to be a person for whom there is no other option – it becomes a do-or-die situation, for whom there is a real necessity of change and social-health. I felt precisely this force of urgency about the professional situation I faced at school and so I organised with my colleague to go through the stakeholder interview process.

I prepared by changing the questions suggested to fit the context in which we worked. I learnt the questions more or less by heart so that my earnestness for the meeting would not seem affected. I prepared before hand, looking over the questions and doing my best to come to the situation with an open mind.

Because of the nature of the questions within this interview, the interviewee is allowed the space to felt heard, as does the interviewer. The interview with my colleague went well and allowed the space for further more-or-less open discussions on various subjects, although it must be noted that this has not been the end of difficult situations between us and the challenge is to always stay open.

What I learnt about myself in particular in this process was that I often act out of a fear or terror when confronted by explosive personalities. There is a general level of anxiety I hold onto if confronted by the frantic and irrational behaviour of others; I find it very hard to keep my centre. My goal is to work on this reactivity within myself so that I can deal with such stressful situations with equanimity, where my sensitivity for another's psychic state does not influence mine to such a great degree.

### The Clarifying of Purpose

The meeting organised for a group of self-led-study peers and I with Nicanor Perlas was very intense. Many expectations did not match between peers and it was unclear whether our group should be exclusive or not. Much of this came to a head after the meeting, but during this time we did have some very productive and inspiring moments. One thing that was clarified for me in this process was the yearning to have a small, dedicated group of peers who are committed to each other's learning and unfolding consistently. This is something I hold as a request to the world, knowing that it is not time yet.

During this particular intensive, Nicanor provided us with very interesting feedback and knowledge. I saw how well a group responds to questions asked with intention and timing and well-placed speech. He provided us with pictures in which to find our own striving, and ways to clarify our questions. We were all part of his morning sessions at YIP as well and it was wonderful to work further with him in this way (in the afternoons).

It became clear to me during this meeting that I am capable of making a difference in education. I can't quite put this into words, as I had already felt this before, but here it was intensified. This gave me much strength to approach the coming situations at school.

### A Perspective of Sustainability at School

At school, the teachers and educators were becoming increasingly edgy and mistrustful of the administration. The lack of communication and hit-and-miss solutions to reoccurring problems were frustrating. Then came the news that even with our under-funded and unfinished primary school, there would be a push to open a high school.

After gathering points of concern from as many teachers as possible, I drafted, wrote and had signed by all members of teaching staff a letter outlining our case against opening a high-school at this time (see appendix). The letter was structured in a three-folded format, outlining the economic, politic and cultural concerns we held.

This document became important for the new principal, who saw that our staff body was conscious and articulate – she has taken much of what we have said on board and some real change came about from this, which is very heartening. I am delegated many writing tasks since this and this makes me feel seen.

### Conclusion

My application of what I have learnt has been largely practical in my setting at school. As our school moves towards a hierarchical structure, such social interventions are less necessary as one can simply go to the principal to sort out problems.

My interest is in the vision of a much more republican<sup>1</sup> school structure and to this end I intend to further what I have learnt here by focussing on sustainable organisational management *in schools* over the next six months. In particular, I will be interviewing a number of people working in non-traditional school structures to find out about their experiences in creating collaborative and responsible educational environments.

This new unit of study is currently marked as Unit 1a on my study website.

I look forward to discovering more!

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<sup>1</sup> Rudolf Steiner, **Conferences, 1919-1920**, Steiner Schools Fellowship, 1986, p. 34.

## Appendix

10.02.2011

To the Gremium:

Following Tuesday's meeting, we, as a teacher body feel it is important to clearly state our concerns so that you may take them into consideration in a structured and positive way. We have outlined both our fears and what we see as being positively present so far.

### Economic Concerns

In regards to the needs of the Gemeinschaftsschule project for it to be successful, we can not agree to any resources of time or funding being withheld or taken from [school name] in the next few years. We would expect that if the school receives extra enrolments or full state funding that this new resource is channelled into the existing primary school.

We are often told there is a lack of money for a number of school purposes.

We believe we have been restricted in the amount we could supply classrooms with and we would like to see more resources for classrooms as soon as possible. For example: more class sets of readers, workbooks, math materials, games, science materials, and especially resources for self-directed learning.

Second, we were informed that there would be a discussion about class size, as 24 students in a fully differentiated, self-directed, split classroom is a lot. When it is expressed that a lack of resources prevents us from fully developing that which is part of the concept, we are concerned about talk of expansion of the school.

Third, we expressed our wish to see a progression with pay levels as the school becomes registered and flourishes. As well as this, we need to have more relief staff. It had occurred on more than one occasion that we were told the school could not afford substitute teachers. This is not acceptable.

Fourth, there is a great need for professional development organised by and for our young, enthusiastic learning team. For example, we are interested in Non-violent Communication, Art of Hosting, literacy and numeracy teaching methods and the development of pedagogical practise and philosophy. One major concern is the lack of time for staff development activities, and also time to organise and beautify the learning spaces at the beginning of school terms.

Lastly pertaining to finances, we would love to see that [name of facilitator], who was with us at our staff development day at the beginning of the year, be asked to lead us into our next transition (with the new principal). In this process we ask specifically that

she help us clarify our goals and working processes to create more order in the politic aspects of the school (meetings, timetables, etc).

In the current situation, we know that the development of the existing school requires maximum resources without compromise.

### Political Concerns

When looking at the polity of the school, there are many policy documents that are missing or incomplete. Of particular concern to us (and for the Gremium or principal/s to create) are:

- A policy document and protocol for teacher/erzieher incidents and injuries
- Policy documents pertaining to the standard of teaching staff
- Policy documents pertaining to the standards for parent communication and involvement
- A policy document and protocol about the bilingual nature of the school and the standard of spoken skills in English and German required by all new students

As well as this, time needs to be set aside for the development of pedagogical resources by the teaching staff, such as: assessment, literacy, numeracy and behaviour management policies and documents. The teachers are unable to find the time in their schedules to do this much-needed work and this requires attention.

We need the protection and clarity of such documents before expanding the school any further.

### Cultural Concerns

There are also concerns with cultural aspects of the school. We are optimistic that the Gremium and teachers can work together in an evolving partnership with greater clarity and honesty. This mood was present at the meeting and gives us an impression of a positive future with a common, conscious goal. We as teachers need access to that inspiration and vision (not the physical future but the actual vision and ideal) of the school that you all seem to share. Through this we will feel the will and inspiration as you do, and not simply feel like the handmaidens of an uncertain idea. It would be wonderful to develop a way with you to share this 'spark' of the school and close the gap between our understanding and practice.

We would ask also that we have easy access to information (that is not in form of meetings, but documents) about the Gemeinschaftsschule project as it progresses. This we can look at and bring feedback to as we individually or collectively feel necessary. We respect your vision for the future and would hope that it is ultimately possible; and we feel it is so very important to exercise caution when putting this future into practise.

If parts of the Gemeinschaftsschule project were to have an impact (positive or negative), either financially, culturally, politically or socially on the [] school, we would like to know how this information comes to be measured and shared in our school community. We

would like to see that there is accountability to the existing school and that there is care being taken to make sure it flourishes.

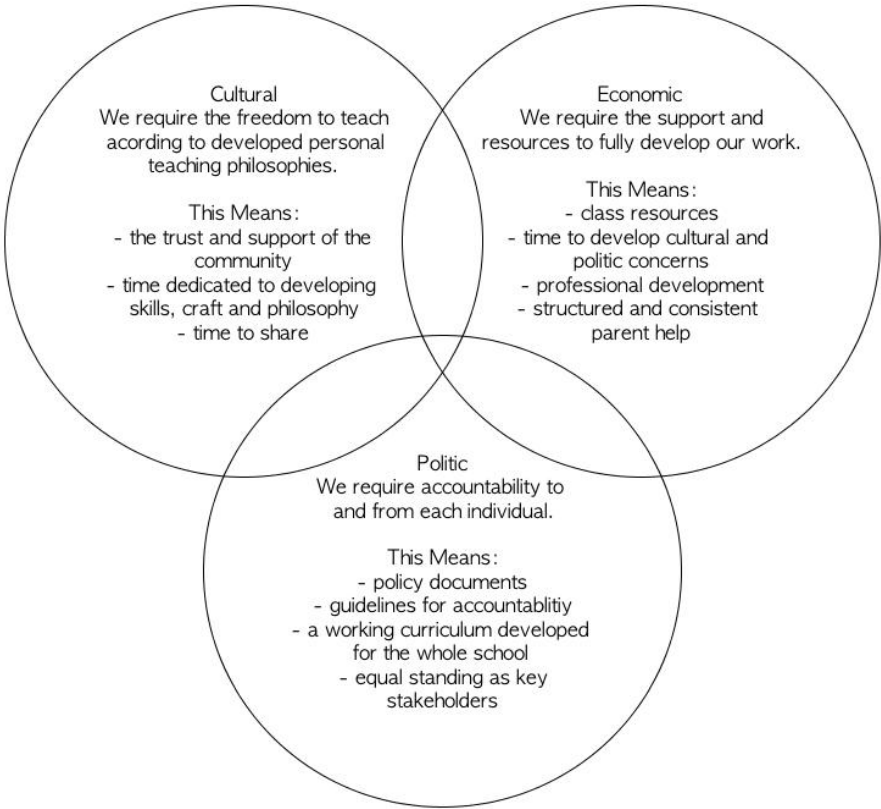
These points pertain to the freedom of information and philosophy.

The Social Whole

It was mentioned by [parent-administrator] in the meeting that a school is a teacher and students in a forest. This is an inspiring picture of one important cultural aspect of a school.

It is imperative that the economic and political concerns of the school are equally as important for all stakeholders. We have provided a picture to illustrate how teachers need these three areas to be balanced in order to create a socially sustainable environment:

An outline of the requirements for optimal pedagogical practice.



We hope that this document gives you relevant and useful clarification of our concerns and needs. We really look forward to building this school up together to create something truly special, truly practical, truly accountable.

Regards,  
  
The Teaching Team.