

# The COVID-19 Pandemic as a Stress Test for Learning Organizations

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## ABSTRACT

This research project seeks to evaluate Peter Senge's concept of the Learning Organization as a framework upon which employers can rely to address the unmet needs of employees in the context of the "the Great Resignation." Senge's concept was formalized as an organizational structural model and leadership modeling tool in his *The Fifth Discipline* first published in 1990. The Learning Organization framework outlines five key disciplines that an organization can implement to strike a balance between organizational success and employee engagement, and which may be the solution to weathering stressful events such as the global pandemic we are currently experiencing. Senge's framework has been widely integrated into managerial practices since its initial publication, but organizations can find it difficult to maintain its tenets when outside influences induce pressure on them.

We are seeing the impacts of the external influence of a global pandemic on organizations resulting in the Great Resignation. The COVID-19 pandemic provides a ripe context within which to assess organizational responses in the global job market as employees are leaving their current employers. Employees are stating they are leaving their jobs because their organizations are not providing transparency, trust, collaborative work environments, a culture of inclusion and belonging, nor career development and upskilling.

How might the Learning Organization framework aid organizations in their responses to disruptions in the workforce? Through a literature review and Causal Layered Analysis this project assesses the causes of the Great Resignation, and of employee needs, organizational stressors, and the benefits of a Learning Organization. This research project argues that when all five disciplines of the Learning Organization are embedded within the organizational culture of a given company, that company has built a resilience to external and internal stressors that can allow it to meet the employees needs in the workplace.

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# INTRODUCTION

There is a massive change taking place in Western knowledge-based industries that has come to be known as either the “Great Resignation” or the “Great Reshuffle” (Stier & Driggs, 2021). Employees are leaving their current roles seeking satisfying employment from employers that are better able to meet their needs in the workplace. This change is an indicator of underlying systemic issues in the workplace that can be attributed largely to unmet employee needs (Gordon, 2021). While the catalyst for this change is attributed to the COVID-19 pandemic (Stillman, 2021), prior research indicated that this period of instability and flux was coming.

A 2013 study by PwC (PwC, 2013) researching Millennials in the workforce concluded that organizations are failing to meet the needs of employees by not enabling work-life flexibility and a cohesive team culture, which are major influences on an organization's ability to retain top talent. Further research published in the *Harvard Business Review* found that all generations, from Traditionalists through GenZ, cite “meaningful work” as a common need in the workplace; however, intergenerational conflict arises as each generation tends to believe the others are only there for monetary gain (Pledger Weeks, 2017).

During times of stress, organizations respond in predictable ways that may be counterintuitive to the success of their stated missions (Kutsco, n.d.). This paper asserts that a successful organization is able to actively engage its employees during turbulent periods to maintain the core principles of their common goals, such that corporate and employee values are aligned. In order to respond to such threats appropriately, organizations need to be resilient. Organizational resilience is “the ability of an organization to anticipate, prepare for, respond and adapt to incremental change and sudden disruptions in order to survive and prosper” (Denyer, 2017).

Peter Senge defines the Learning Organization framework as an approach that engages employees and promotes organizational success. He first outlined the concept in his 1990 book *The Fifth Discipline* and its revised 2006 edition. The concept of the Learning Organization is based on rigorous research and anecdotal evidence, collected through MIT's Society for Organizational Learning, to prove that “the only sustainable competitive advantage is [an] organization's ability to learn faster than the competition” (Senge, 2006). A Learning Organization “addresses the question [of] how today's organizations can experience continuous growth to perform better than [their] competitors” (Zeeman, 2017). This framework employs multiple disciplines to support both employee and organizational goals, and can also be a tool to promote resilience to assist in navigating organizational stress.

A Learning Organization is centered on five disciplines: systems thinking, personal mastery, mental models, shared vision, and team learning (Senge, 2006). The suggested approach to becoming a Learning Organization is to implement all five of these practices within an organization to be successful, where partial implementation may only lead to partial success. Senge proposes that each of these disciplines can be intentionally created within any

organizational model in an effort to both engage employees and for the betterment of the whole organization (Senge, 2006, 15).

This project poses the research question: “How might the Learning Organization framework aid organizations in their responses to disruptions in the workforce?” This research project examines the Learning Organization framework as a functional model that promotes organizational resilience in times of high stress. When a committed organization continues to invest in its people and established resilient practices it will pull through hard times, and thus should continue to invest in the programs that support its people and not restrict resources to these efforts when faced with significant external stressors (Denyer, 2017). *The Fifth Discipline* (Senge, 2006) provides the framework of a Learning Organization. Each of the five disciplines outlined forms the basis for organizational structure and organizational culture that enables building resilience throughout any organization. The fifth discipline itself is Systems Thinking, which brings together the whole to better understand the sum of its parts, being able to view the entirety of the inputs and outputs of the system at hand.

This research project begins with a review of the changing workforce needs as a result of the COVID-19 pandemic, then goes on to identify pre-pandemic indicators of the Great Resignation. The Learning Organization framework is then assessed as a model of organizational resilience and a stress test to its effectiveness from outside influence on an organization and as an approach to organizational structure that addresses unmet employee needs in their working life. Finally, we show a comparative analysis of the reasons for the Great Resignation against the tenets of the Learning Organization to identify what is missing in corporate culture.

The outcomes of this project contribute to research around organizational culture and workplace structures. This research pieces together an approach for employers to use in their pursuit of a workplace that both supports and positively enables their employees to be lifelong learners in order to contribute to organizational goals and their own career advancement.

Further research may be completed subsequent to this review in order to assess the tactical implementation of these findings. The first edition of the Fifth Disciplines was published in 1990, the revised edition was published in 2006 to account for major shifts in thinking centered around globalization, increased corporate performance measures, scarcity of time as a resource, widening economic gaps, and increased environmental stress. Since the Learning Organization framework was updated in 2006, there are types of organizations and work that were not considered, and new global trends that have emerged since the time of its publication.



## DEFINING TERMS

**Peter Senge** is the Founding Chair of the Society for Organizational Learning and Senior Lecturer at the MIT Sloan School of Management. He is the author of *The Fifth Discipline* (1990; revised 2006) and accompanying *The Fifth Discipline Fieldbook* (1994).

***The Fifth Discipline: The Art & Practice of the Learning Organization*** (Senge, 1990; revised 2006) is the book that outlines each of the five disciplines of a Learning Organization, their interrelations, and applications.

***The Fifth Discipline Fieldbook*** (Senge et al, 1994) is the accompanying text to *The Fifth Discipline* that gives real world anecdotes and implementation ideas for anyone who wants to create a Learning Organization.

A **Learning Organization** is any business, company, or organization that sets itself up to create and use knowledge as a competitive advantage by employing the five disciplines defined by Senge's teaching and research (Senge, 2006).

Senge posits that Learning Organizations share **five disciplines** (Shanahan, 2019)

1. **Personal Mastery:** They Have a "Lifelong Learning" Mindset
2. **Mental Models:** They Always Have Room for Innovation
3. **Shared Vision:** They Have Forward-Thinking Leadership
4. **Team Learning:** They Champion Knowledge Sharing
5. **Systems Thinking:** They Understand the Whole and Thrive on a Collaborative Culture

The **Fifth Discipline** is **Systems Thinking**. One needs to be able to understand the whole to be able to understand in full the impact of each of the five disciplines on a Learning Organization. In these five disciplines, systems thinking provides the tools to see the wholeness of interconnected parts, personal mastery challenges individuals to be lifelong learners, building mental models allows individuals and teams to challenge their biases and assumptions, a shared vision ensures teams are working towards the same ends, and team learning encourages interpersonal connections and dialogue for the purpose of understanding (Senge, 2006).

**The Great Resignation** is the term to define record numbers of employees (48 million people quit their jobs in 2021, a 23% increase over pre-pandemic levels [Iacurci, 2021]) leaving their jobs in the period of time since the start of the COVID-19 pandemic.

# CONTEXT

This section reviews the related topics of this research project, namely the Great Resignation, organizational disruption and stressors, and the Learning Organization framework and its disciplines. These are presented in detail to better understand what the Great Resignation is and how it came to be, so that we can then align the stated issues to the Learning Organization framework to determine its usefulness to building resilience in organizational culture.

## The Great Resignation

The Great Resignation is a global trend in which employees are leaving roles in their current organizations in record numbers. According to CNBC data from the United States (Iacurci, 2022) 48 million people quit their jobs in 2021, a 23% increase over pre-pandemic levels. In January 2022, an additional 4.3 million people quit their jobs, indicating that the trend is likely to continue through this year. Organizational culture reasons employees cite for leaving their jobs include the lack of elements including transparency and trust, collaborative work environments, a culture of inclusion and belonging, and opportunities for career development and upskilling (IDC, 2021). Employees indicate mental health issues as personal reasons for quitting their jobs and research indicates that as many as two thirds of employees experience burnout as a result of workplace stress (Lago, 2021). Taken together, these reasons paint a picture of an organizational culture that is out of step with employee needs. Of note, few studies find that pay and compensation are major factors in employees' decisions to resign (Stillman, 2021). This points to a larger, pervasive question of how to structure an organization when the employer is unable to satisfy employee needs with monetary compensation. However, these employee needs did not arise in parallel with the pandemic, they are only now coming to the fore because of the volume of employees acting on their unmet needs by leaving their current jobs. Previous research studies concluded that organizations that create flexible work environments, increase transparency around career advancement, build a sense of community, and invest time and energy in listening to and connecting with employees are more successful and have better employee retention and engagement than organizations that do not explicitly invest in these types of efforts (PwC, 2013). Organizations that invest in creating a culture that supports employee needs are building resilience into their business structures and practices that will assist them when external stressor events put pressure on the organization.

While the COVID-19 pandemic is a catalyst for change, none of these findings are new. What we are seeing is a heightened need to concentrate efforts on listening to employees and building organizational structures that meet their needs. The 'LinkedIn 2022 Global Talent Trends Report' outlines various current topics coming directly from the workforce about what their needs are and how they want those needs to be addressed. In the title section of the LinkedIn report it is stated that the pandemic has brought to the forefront that employees are clearly communicating their needs and that this is a "Watershed moment for company culture." The two main themes of company culture that are introduced in this report are flexibility and well-being. These themes come from their surveys which indicate that organizational culture is the

most important decision in accepting a new job, in that the culture of an organization must 1) fit work into personal life, and 2) offer work-life balance.

## Disruption and Stressors in the Workplace

In order for an organization to respond successfully to stresses and threats, it needs to implement processes and structures that will ensure its resilience. Kutsco Consulting (n.d.) identifies seven different types of organizational stress and solutions to identify and prevent these stresses. These stressors have an impact on the employees within an organization, and while they were not identified through research directly relating to a pandemic, the employee stress points are the resulting effect from organizational stress, which would include the impact of a pandemic. Included in the list of possible solutions to the stressors are the disciplines from the Learning Organization framework that are aligned. Details of each discipline are later in this section.

Types of organizational stress (as identified by Kutsco Consulting):

**Demand:** unrealistic demands where the employee may not have the skills, resources, or knowledge to complete the task.

**Effort/Reward:** high effort needed from the employee to complete a task without the appropriate reward being available, creating disengagement

**Control:** employees require a balance between responsibility and authority, this control ensures that employees are empowered to complete their tasks

**Organizational Change:** When employees are not engaged and communicated with when changes are taking place within their organization.

**Manager/Superior:** When leaders are not clearly communicating expectations to employees, and those expectations are not consistently communicated across a leadership team.

**Social Support:** when colleagues are not working together towards common goals and are pitted against one another for professional gain.

**Job Security:** Occurs when employees are able to provide for themselves and their families, and do not fear their role being terminated.

Solution to identify and address organizational stress:

**Awareness:** leaders must be deeply engaged with their employees to be aware of the stressors that are impacting their teams. (Mental Models, Building Shared Vision)

**Mindset Shift:** updating practices from traditional business practices, this can be to focus on building employee strengths, communicating the mission and values, focusing on culture and engagement. (Personal Mastery, Team Learning, Mental Models)

**Clear Communication:** engaging communication between employers and employees creates ownership, accountability, and clarity. (Building Shared Vision)

**Mutual Support:** to encourage a rapport between all layers of employees and employers demonstrates that everyone is respected and heard. (Team Learning, Mental Models)

**Flexibility:** allowing employees to work when and how it is best to support their work/life balance demonstrates a commitment to employee needs. (Building a Shared Vision)

These solutions to these workplace stressors align with the most common unmet needs in the workplace identified by knowledge-based workers (PwC, 2013), indicating that employees' needs are attuned to building organizational resilience. The outcome of building organizational resilience that is in line with employee needs is a workforce whose members support one another through difficulties and challenges and is better able to manage the effects of societal and organizational change. Organizational resilience ensures that potential issues have been identified and a plan is in place to address them. With workplace stressors and associated solutions identified, leaders of organizations can evaluate approaches to implementation and building resilience in the workplace.

Various approaches to creating organizational resilience are possible, one such approach is the integration of feminist business practices into organizational culture to support the employee experience. In a 2021 study, Johanna Lauri explores the concepts of Business Feminism. This movement of directly associating feminism in business practices aligns with many of the stated reasons for “pandemic epiphanies” (Miller, 2021), where employees are experiencing major shifts in identity and purpose. Lauri quotes visibility, sisterhood, community, belonging, safety, and ethical production as primary tenets of the feminist business model, where “feminist values of sisterhood need to be united with the business values of individuality, competition and profiteering from feminism” (Lauri, 2021). Feminist business practices are directly aligned to the common themes of flexibility and well-being, as stated in the LinkedIn 2022 Global Talent Trends Report, and when integrated into feminist business models, employees are supported in order to come to a state of enlightenment through pandemic epiphanies.

In a study that is focused on strategies for digital media companies, “The Feminist Recovery Strategies” (Gordon, 2021), there are specific recovery strategies that are top of the list that include valuing emotional labour, developing healthy remote work cultures, being more flexible about where and when to work, and baking entrepreneurship into core business practices. These concepts align with the LinkedIn Talent Solutions report of flexibility and well-being where employees identified a need for work to fit into their personal lives which supports their work-life balance. These recovery strategies are speaking to the very core of how people want to work and what working means to them. In the absence of creating intentional organizational culture that supports what employees are demanding, any organization is setting themselves up for failure.

“The fantasy that somehow organizations can change without personal change, and especially without change on the part of people in leadership positions, underline many change efforts doomed from the start” (Senge, 2003). Senge outlines this sentiment when discussing the impact of the Learning Organization on management practices. As much as the Learning Organization concept is about engaging all levels of the organization, it needs to start with their leadership's willingness to change and be different.

## The Learning Organization Framework

New applications of the Learning Organization in a current context state that “there may be significant non-economic advantages to being a Learning Organization, and that *the Fifth Discipline* may be more valuable for its ethical perspectives on the organization than as a prescription for how to achieve business success” (Hansen et al., 2020). When business leaders consider this view of the ethical perspectives of a Learning Organization, it allows them to come away from the view of tactical implementation and consider their people. The people that make up our workforce and our community. The basic principles of diversity, inclusion, belonging, and purpose come to the forefront of the discussion around what the disciplines are trying to communicate as a whole. Alignment of personal and organizational values is critical for an employee to feel belonging and “empty values statements create bitter and unmotivated employees, alienate customers, and undermine managerial credibility” (Peoplewave, 2017).

Personal success takes on a view of purpose and contribution. Where the financial goals of an organization may have targets and leaders can confidently say that they have met these goals, the general sentiment of contribution from its people is not as easily quantifiable. Personal growth and employee success cannot be measured against the organization's goals as a whole. “A Learning Organization is a place where people are continually discovering how they create their reality” (Senge, 2006, p 12). When we evaluate the Learning Organization framework, we see how the individuals that make up the whole are integrated into the larger view of the system in which they are working. No part of the Learning Organization can be regarded as independent when we consider the whole system in which it is designed to operate.

Within the framework of a Learning Organization, there are a number of topics that come into play to allow for an understanding of the larger concept at hand. While Senge proposes that there are five disciplines operating within a Learning Organization, there is a broader definition of the whole that needs to be considered. If the goal of any organization is its own success, how do we begin to define the concept of success? While some views may represent profitability and meeting financial goals, it is critical to integrate the success of the people involved as well. Some organizational assessment frameworks to be considered might be the Triple Bottom Line, or Doughnut economics. The Triple Bottom Line is a sustainability framework that includes an assessment of social, environmental, and financial impact of an organization (Elkington, 2018). The model of Doughnut economics evaluates organizational impacts from social to ecological, ensuring that minimum social needs are met, and capping the ecological impacts to ensure no harm is done (Raworth, 2018).

The common points between these are the inclusion of non-financial success indicators that elevate the organizational model to a systems view of understanding the larger integration, and responsibility, to the environment and its people. A study conducted by IDC (2021) includes “demonstrated corporate social responsibility” as a major contributor to the employee experience, meaning that employees are conscious of the impact of their organization on the environment and society generally.

Peter Senge is credited with creating an early framework for what a Learning Organization is, and the Journal of Business Strategy named him one of the Strategists of the Century who had the greatest influence on business strategy in the 20th century (NA, 1999). There are other approaches to the creation, implementation, and effectiveness measurements of Learning Organizations; however, they all largely share the core framework that was proposed by Senge in 1990. The Fifth Discipline itself is Systems Thinking, where the implementation of all five disciplines is the framework that enables a business to be a Learning Organization.

Senge's *The Fifth Discipline* is used as a baseline in the present analysis, not to assess the organizational performance related to implementation of a Learning Organization, but instead as a common point of entry to understand the need for these disciplines and how they align to the employee experience. Given the predominance of Senge's framework in much of the literature that discusses Learning Organizations, and how some reference more disciplines (Ju et al., 2021) or fewer disciplines (Garvin et al., 2008), the five disciplines presented by Senge act as distinct in their presentation without having repetitive concepts in more than one area, i.e., embedded system and system connection (Ju et al., 2021), which fall into the systems thinking category. Senge's framework is also distinct enough to differentiate concrete learning processes (Garvin et al., 2008) into both personal mastery and team learning (Senge, 2006).

The Dimension of a Learning Organization Questionnaire (DLOQ) can be used to build upon the framework, and outlines the following dimensions: continuous learning, dialogue and inquiry, team learning, embedded system, system connection, empowerment, and strategic leadership (Ju et al., 2021). When Ju et al. completed their analysis it was to determine the effectiveness in a composite study of data using this questionnaire. While this is a measurement tool that proposes more than the five dimensions stated by Senge, they are all related to the original five and serve only to measure distinct characteristics within an organization. The DLOQ also claims to measure the relationship between organizational performance and employee attitudes using a meta-data analysis approach. This study showed that using this meta-data approach there was a positive correlation to organizational performance and the leadership intent on creating a Learning Organization. This questionnaire tool might give some insight into lower scores of certain areas, but also proposes no routes to raise the scores.

In another assessment tool, Garvin et al. (2008) discuss three building blocks of a Learning Organization categorized by a supportive learning environment, concrete learning processes, and leadership that reinforces learning. This is again intended to serve as a tool to identify areas of need within an organization where the functional areas of the building blocks are lacking.

Leading up to the creation of the Learning Organization Framework, Senge references the impact of Total Quality Management (TQM). "TQM techniques offer advantages in addition to satisfying customers and helping them to succeed... TQM brings suppliers, customers, managers, and employees into the decision process" (Lee & Lazarus, 1993). The limitations of TQM are centered around the customer success and organizational efficiency measurements, but completely ignore the employee needs and experience in the evaluation of metrics, despite

being stated goals. Where TQM is designed to avoid poor quality goods and services for the consumer side, more was needed to bring the employees that were delivering these programs to the forefront of the organizational structure and corporate culture to ensure a complete view of the systems of delivery.

In the updated version of *The Fifth Discipline* (2006), Senge opens with notes around the comments of W. Edwards Deming, whom he had asked to write a comment for the book jacket. Deming was a leader in TQM in the 1980s. In his comments around this book, Deming touches on an interesting, and perhaps controversial topic in his quote, “we will never transform the prevailing system of management without transforming our prevailing system of education, they are the same” (Senge, 2006, xiii). Deming explains that people learn from a young age the concepts of hierarchy, right and wrong answers, uniformity, competitiveness, and distrust, and how these transform and connect into the prevailing style of management. Senge views the current educational system as out of date for the demands of the current workforce. It begins at an early age to slot children into “learning styles”, which are not comprehensive, and neither do they capture the essence of how each pupil may benefit from multiple learning styles, and not only the one in which they were slotted. Literacy scores have stagnated since the 1970s (USA) and standardized testing is outdated (Boyce, 2019). The framework of a Learning Organization attempts to dismantle some of these long-held standards that are integrated into Western culture at a young age through our predominant educational system. It takes disciplined work and commitment at all levels of an organization to untangle these standards and open themselves to a renewed dedication to relearning how to learn and contribute as a whole. Research into educational reforms is extensive, and this is not a comprehensive assessment, instead some of the core principles of the Learning Organization may be used in the workforce to influence the employee and employer mindset to work together more effectively.

To update a whole system of education would be a massive undertaking, no matter where one sought to begin. Based on the tenets of the Learning Organization, we may posit that beginning with systems thinking might be a good place to start. Having drawn a hard line in most Western educational institutions between Art and Science, as broad topics, may yet prove to be one of its most critical flaws. Being able to reshape the interconnectedness of the systems to not draw hard divisions between subject matter, but instead elevate the curriculum to one of inclusiveness and systematic interdependence in shaping the thought processes of its pupils could be beneficial. Millennials have never known an organizational environment without computer technology (Graen & Grace, 2015), and the type of work happening needs an all-encompassing view of both arts and sciences. The innovation required for this type of work needs input from across the spectrum of all team members’ input. Being able to create a Shared Vision with the inclusiveness of a team requires at least fundamental knowledge of multiple educational fields to understand the implications of the whole.

# The Five Disciplines of the Learning Organization

Senge outlines the five disciplines of the Learning Organization as follows:

## Systems Thinking

**Systems Thinking** is the conceptual cornerstone of the Learning Organization. “Systems Thinking is a discipline for seeing wholes. It is a framework for seeing interrelationships rather than things, for seeing patterns of change rather than static ‘snapshots’.” (Senge, 2006, p68). Any individual part may have some effect, but the whole working together is where the magic happens. One needs to be able to understand this wholeness to be able to fully understand the impact of a Learning Organization. “In mastering systems thinking, we give up the assumption that there must be an individual, or individual agent, responsible. The feedback perspective suggests that everyone shares responsibility for problems generated by a system.” (Senge, 2006. p78) This is needed to be able to understand how the other four disciplines are interrelated and that all must be enabled in order to be an effective Learning Organization.

## Personal Mastery

**Personal Mastery** is the discipline concerned with personal growth and learning. This creates an individual who is aware of their own areas of ignorance and potential for growth and embarks in the lifelong process of learning. The idea of learning needs to be deeply embedded and shared by those in the organization. It doesn't matter what any individual chooses to be learning about, it's the process that matters, and the ability to learn that is critical. “People with high levels of personal mastery are continually expanding their ability to create the results in life they truly seek. From their quest for continual learning comes the spirit of the Learning Organization.” (Senge, 2006. p131)

## Mental Models

“**Mental models** are deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action” (Senge, 2006. p8). An individual needs to be able to evaluate their own biases and assumptions against the larger world view to understand their limitations and gaps. This forms a solid basis to continue their learning journey and continually check their bias and understanding.

## Building Shared Vision

“One is hard-pressed to think of any organization that has sustained some measure of greatness in the absence of goals, values, and missions that become deeply shared throughout the organization.” (Senge, 2006. p9) This can be summed up by the idiom “Teamwork makes the dream work.” All employees need to be working towards the common vision to be able to achieve their organizational goals and understand how individual work contributes to the organization.



## Team Learning

As its name suggests, this discipline is about a team being larger than the sum of its parts, when all the team members are learning and growing together. “When teams are truly learning, not only are they producing extraordinary results, but the individual members are growing more rapidly than could have occurred otherwise” (Senge, 2006. p9). This discipline focuses on how a team interacts, and particularly around the concept of ‘dialogue’. Dialogue needs to be monitored for patterns that undermine learning or create defensiveness, which can lead to misunderstanding and distrust. To be implemented successfully, Team Learning requires focus on how a team gets in the way of their own learning and delays the listening and understanding required to advance. “Teams, not individuals, are the fundamental learning unit in modern organizations” (Senge, 2006. p10). Team Learning is the most difficult of the disciplines to implement because it involves bringing a team together to learn—something that **we** have traditionally viewed as an independent activity.

It is important to define these disciplines in order to make sense of the necessary components to build a Learning Organization. These definitions are important when evaluating the Systems Thinking discipline, which brings together the other four disciplines. *The Fifth Discipline Fieldbook* (1994) section on Systems Thinking speaks critically to the subject-verb-object (SVO) structure of some languages (Senge et al, 1994, p88). This specific structure influences the method of thinking in a particular way, one that is often counterintuitive to how systems need to be understood to be analyzed. For example, we can evaluate the English language structure of “A causes B”, where A is the subject and B is the object, which is not conducive to the scenario of “A causes B while B causes A, and both are related to C and D”. This example illustrates how the five disciplines interrelate, in that there is not one starting point, one ending point, nor are there specific steps to implementation. This way of defining the language that is used helps to underscore how Systems Thinking is the whole that brings the system together.

Systems Thinking may be thought of as either the first or last discipline, or perhaps both first and last. “The key point of understanding and applying the five disciplines of Learning Organizations is that they are all interrelated. Each discipline cannot stand independently” (Zeeman, 2017). There can be emphasis placed on certain aspects of the discipline to get started, however there needs to be commitment to the whole in order to be on the journey of creating a Learning Organization.

# **METHODOLOGY AND APPROACH**

The Great Resignation provides a ripe context to evaluate unmet employee needs in the workplace. It is difficult to assess unmet employee needs without a framework to anchor them. The Learning Organization provides a potential framework for organizations to implement to address the unmet needs of employees. In order to align the unmet needs of employees with the framework, this paper relies on a literature review and employing the Causal Layered Analysis to better understand their connections.

## **Research Questions**

### **Primary Research Question**

This question serves as the foundation of this research project in order to evaluate the Learning Organization as both a framework and model for organizations to implement.

How might the Learning Organization framework aid organizations in their responses to disruptions in the workforce?

### **Secondary Research Questions**

The secondary research questions serve to deepen this research in order to understand the relationship between employee needs and organizational cultures.

Questions for consideration:

- How might we assess employee responses to the pandemic as a major external stress event on the organization that employs them?
- How are employees' needs addressed by the Learning Organization framework?
- Will all five disciplines of the Learning Organization be valid in a post-pandemic context?

## **Literature Review**

Two years into a global pandemic, ample research has been conducted into changing employee attitudes and unmet workplace needs. This literature exists in the form of business journals, media reports and articles, data-based research, podcasts, and published academic papers.

A literature review was chosen in place of direct research such as polls, surveys, or interviews. This decision was taken to allow a maximum breadth of data to be integrated in this research project relating to any number of fields and organization structures. Direct research would have been limiting when there is ample research available from major research institutions and media at large.

## **Causal Layered Analysis**

The Causal Layered Analysis (Inayatullah, 2017) is a futures tool to analyze the depth of concepts and create a logical view of the system in question. A CLA can delve into the deeper levels of an issue by understanding the following:

- Litany: The public description of the issue, observable trends
- Systemic Causes: short-term historical facts and technical explanations
- Worldview: mental models, culture, and values
- Myths and Metaphors: archetypes and emotional responses

This research project uses two CLAs to review 1) what employees are demanding and the unmet needs of employees, and 2) traditional business practices and Learning Organization business practices.

The CLA was chosen for this research to give a rich context to the issue of employees' unmet needs to better understand the feeling behind the workplace disruptions in question. The second application in this project is to understand the business practices that either failed or were never present that allowed for the Great Resignation to take place at all. This tool allows the shaping of the future in a concise and effective manner.

## **FINDINGS: ANALYSIS AND SYNTHESIS**

The findings presented in this section bring together the whole system of unmet employee needs and how organizations can set themselves up to better understand their employees and how to build an organization that is attuned to their needs. In order to understand the structures required to build a learning organization and support employees, this analysis compares the causes of the Great Resignation against resilient organizational models and common failure points within organizations.

### **Understanding the Great Resignation**

While there has been growing need for change, the pandemic is a catalyst in accelerated change sweeping the workforce. Workers are leaving or changing jobs en masse looking for a new way of working and an organization that aligns to their values and preferred working styles (LinkedIn 2022 report). In this LinkedIn report, the study concluded that 51% and 66% of Millennials and Gen Z, respectively, want a culture built on excellent mental health and wellbeing, this is a stark contrast from only 31% of Baby Boomers.

Global Human Resources firm, ADP, outlined ways to improve mental health in the workplace (Lago, ND). Primary among those recommendations was to view investing in employee mental health as an investment in the business. It is estimated that every \$1 spent on mental health investment returns \$4 in improved health and productivity. Among the other recommendations are to re-evaluate employee benefits, proactively monitor employee mental health, encourage use of time off, and encourage a culture of openness about workplace pressures. The author states that when leadership and talent management professionals speak of the challenges in their work life it can encourage others to be more open about their struggles, help their colleagues avoid imposter syndrome, and promote a common approach to balancing working and living. These can be seen as attributes of the disciplines of Team Learning and Mental Models. When a worker understands that others are feeling the same stressors as themselves, they can see their colleagues in a new light and approach their work differently with those people. Being able to define the common stress points in an organization is critical to being able to identify them within one's own organization and begin to create plans to address them.

### **Structuring for Resilience**

Organizations respond to stress factors differently, and when an organization has built a resilience plan it is better set up to handle those stress factors when they come along. The International Consortium for Organizational Resilience (ICOR, n.d.) has created a basic model to address resilience in an organization and is a starting place for strategies to become more resilient. The model is composed of three Dimensions, each dimension having three strategies, which are:

- Dimension 1: Leadership and Strategy

- Shared vision
- Understand context
- Effective leaders
- Dimension 2: Culture and Behaviours
  - Healthy culture
  - Shares information
  - Continually improves
- Dimension 3: Preparedness and Managing Risk
  - Available resources
  - Manages risk
  - Manages change

Based on this model, the fundamental tenets of a Learning Organization and a resilient organization are similar, even using some identical vocabulary to describe the resilience model as found in Senge's framework. In order for an organization to begin building its resilience plan, it needs to identify potential areas of risk that are contrary to the success of the Learning Organization framework. The ICOR model takes a positive outcomes-based approach to building this type of resilience plan. In building the plan for implementation of this model, the exploration of existing issues in the workplace would be conducted, including documenting unmet employee needs. The evaluation of existing issues seeks to document the interpersonal dynamics of that organization's employees to address negative behaviours that are counterintuitive to the success of implementing a Learning Organization framework.

## Organizational Learning Disabilities

Senge outlines in *The Fifth Discipline* (2006) that organizations can have "learning disabilities" (Senge, 2006, p.17). These are common groupings of issues that present across organizations. Senge proposes that there is often an abundance of evidence that an organization is in trouble, however the evidence is often either overlooked or its importance is not understood. This results in "the organization as a whole [being unable to] recognize impending threats, understand the implication of those threats, or come up with alternatives" (Senge, 2006, p.17). Being able to recognize these common threats, and do something about them, is at the core of an organization becoming resilient. These learning disabilities (Senge, 2006, p18-25) are:

- **I am my position:** individual employees see themselves only as the set of tasks to which they are currently assigned and do not take action to understand how their role is designed to interact with the others within the organization.
- **The enemy is out there:** this occurs when an organization is focused on only external threats to their performance and do not assess the impact of their internal processes on their overall success, or lack thereof.
- **The illusion of taking charge:** this is defined when proactiveness is reactivity in disguise, where an organization is taking charge of its current issues, but not evaluating the whole to truly prevent issues from arising in the first place.

- **The fixation on events:** when an organization focuses only on the event in the short-term past as explanations for current situations, the organization is not seeing the longer-term patterns of behaviours that contribute to the current state.
- **The parable of the boiled frog:** this refers to an organization's ability to respond to immediate threats but an inability to see the slowly building threats that are working against them. This is because people are inherently attuned to sense big threats for survival, and not the slowly building issues arising.
- **The delusion of learning from experience:** this arises from a function of time and perception, where often the consequences of actions are not seen in direct correlation to action itself. It may take long periods of time for consequences to be fully understood and the people that were involved are not likely to be in the same roles or the organization when the results finally come in. Thus, people never really learn from these experiences because they are not present to witness the results.
- **The myth of the management team:** the idea that a group of senior employees know best how to manage complex issue sets and have perfect solutions. There is much management by consensus which is not practical to solve deep and complex issues by a management team that is seen as protecting their own silos of staff and designated work tasks. Managers need to be able to admit their ignorance and inquire into the most complex issues.

Senge's list of "learning disabilities" is in line with a Learning Organization and by uncovering and addressing them an organization can be more resilient to future issues. In research conducted around organizational resilience, Denyer (2017) proposes five pillars to foster resilience in an organization: prioritizing reliability, recognizing complexity, strong leaders, acknowledging risk, and decentralized decision-making. This same research outlines the following strategies to address operational and organizational resilience: Flexibility of working hours, staff reallocation, minimization of turnover and absenteeism, job redesign, and reorganization of operations. There are some parallels between organizational resilience and the core disciplines of a Learning Organization from Denyer's model in that a well-structured Learning Organization is naturally resilient, where Denyer's strategies to address resilience are the same that occur in a Learning Organization to address learning disabilities. Similar research into organizational resilience (Smith, 1988) identifies organizational strategies to reduce stress in the workplace, including: skills training, job redesign, increased employee participation and personal control, enhanced work group cohesiveness, and improved communication. Building resilience and reducing workplace stress are both aligned with the goals of implementing a Learning Organization framework.

## Learning Organization Practices, Principles, and Essences

Senge (2006, p383) uses a model in *The Fifth Discipline* to build the five disciplines up from Practices (what a person does), through Principles (guiding ideas and insights), to the top of the pyramid as Essences (the state of being for those with high levels of mastery in this discipline). This PPE framework is illustrated as pyramids in *The Fifth Discipline* (Senge 2006. pp 385-

396). These are presented here as a table for ease of reading and comparison based on the images included in *The Fifth Discipline*.

	<b>Systems Thinking</b>	<b>Personal Mastery</b>	<b>Mental Models</b>	<b>Building Shared Vision</b>	<b>Team Learning</b>
Essences	-Holism -interconnectedness	-Being -Generativeness -Connectedness	-Love of Truth -Openness	-Commonality of Purpose -Partnership	-Alignment -Collective Intelligence
Principles	-Structure influences behaviour -Policy resistance leverage	-Vision -Creative Tension vs. Emotional Tension -Subconscious	-Espoused Theory vs. theory in use -Ladder of inference -Balance inquiry and advocacy	-Shared vision as “hologram” -Commitment vs. compliance	-Integrate Dialogue and Discussion -Defensive Routines -Functioning as a whole
Practices	-System Archetypes -Simulation	-Clarifying personal vision -“Holding” creative tension -Focusing on the result -Seeing current reality -Making Choices	-Distinguishing ‘data’ from abstractions based on data -Testing assumptions -“Left-hand” column	-Visioning process -Shared personal visions -Listening to others -Allowing freedom of choice -Acknowledging current reality	-Dealing with current reality -Acting as Colleagues -Suspending Assumptions

*Table 1: Practices, Principles, and Essences of the five disciplines of a Learning Organization*

## **Causal Layered Analysis**

In evaluating the employee needs for a different type of working environment, and the organizational approach to building a Learning Organization, the concept of building an organizational culture around shared values is present. The result of attempting to create a Learning Organization is similar to what a values-based system looks like in practice. The desired state of being for an organization that is attempting to address the needs of their employees is “an organization 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 how to learn together” (Zeeman, 2017). Increased stress and mental health (Gordon, 2021) will remain a top impact on the workforce as the pandemic drags on. Valuing emotional labour, developing healthy remote work cultures, flexibility in when/where work occurs, and intrapreneurship come out as potential strategies for organizations to integrate in the coming years to address employee needs (Gordon, 2021). A values-based culture that is addressing the expressly stated

needs of employees, and balancing organizational goals, is the backbone of the Learning Organization approach.

### Causal Layered Analysis: Employee dissatisfaction and needs in the workplace

	Employee dissatisfaction	Employee needs in the workplace
<b>LITANY</b>	<ul style="list-style-type: none"> <li>• "The Great Resignation"</li> <li>• "The Great Reshuffle"</li> <li>• Increasing volumes of resignations</li> <li>• News Media and research studies around employees leaving jobs</li> <li>• High rates of job posts and role vacancies</li> </ul>	<ul style="list-style-type: none"> <li>• Mental health a top priority</li> <li>• Feeling supported as a person</li> <li>• Retaining top talent</li> <li>• Aspiration to new ways of working</li> </ul>
<b>SYSTEMIC CAUSES</b>	<ul style="list-style-type: none"> <li>• Mental Health and Wellbeing not being supported</li> <li>• Treatment of employees during the pandemic</li> <li>• Low current pay / higher available pay for similar work</li> <li>• Stalled career paths</li> <li>• Failure to be recognized for performance</li> </ul>	<ul style="list-style-type: none"> <li>• Flexible work</li> <li>• clear role expectations</li> <li>• Learning and training opportunities (career development)</li> <li>• Employment benefits</li> <li>• Work as part of self-identity</li> <li>• Work values align to personal values</li> </ul>
<b>WORLDVIEW</b>	<ul style="list-style-type: none"> <li>• Loneliness</li> <li>• Burnout</li> <li>• Exhaustion</li> <li>• Lack of Transparency &amp; Trust</li> <li>• Minimal Work/life Balance</li> </ul>	<ul style="list-style-type: none"> <li>• Belonging</li> <li>• Contribution</li> <li>• Purpose</li> <li>• Collaboration</li> <li>• Innovation</li> <li>• Togetherness</li> <li>• Freedom</li> </ul>
<b>METAPHORS &amp; MYTHS</b>	<ul style="list-style-type: none"> <li>• Maximize shareholder returns</li> <li>• Toxic Culture</li> <li>• Buyer's market</li> <li>• Tidal Wave</li> <li>• Tsunami</li> </ul>	<ul style="list-style-type: none"> <li>• Workers in the driver's seat</li> <li>• It's not all about money</li> </ul>

Table 2: Causal Layered Analysis, Employee dissatisfaction and needs in the workplace

These two CLAs are placed side by side to view the relationship between unmet employee needs with the principles of a Learning Organization. The employee dissatisfaction column presented in this table is the summation of the stated reasons for the Great Resignation, and the employee needs column is from the research conducted on unmet employee needs in the workplace. The Learning Organization tenets address the needs of employees when the whole system is integrated into business practices, thus supporting employees and business practices alike.



“The buying patterns of a candidate are shifting away from just compensation and moving into what is the mission and vision of the company as it pertains to the values of that individual and why they want to join,” says GitLab’s Rob Allen (LinkedIn, 2022).

When assessing the values that employees ask organizations to embody, as well as the needs they ask the organization to meet, those demands need to be measured against an organization's practices. Below, there is an evaluation of traditional business practices, a non-Learning Organization, and the principles that Senge has set forth in the Fifth Discipline of what a Learning Organization looks like in practice.

### Causal Layered Analysis: Traditional Business Practices and Learning Organization Business Practices

	Traditional Business Practices	Learning Organization Business Practices
<b>LITANY</b>	<ul style="list-style-type: none"> <li>• Top-down hierarchy</li> <li>• One way learning</li> </ul>	<ul style="list-style-type: none"> <li>• All levels actively involved in decision making</li> <li>• Everyone has something to teach others, or learn from others</li> </ul>
<b>SYSTEMIC CAUSES</b>	<ul style="list-style-type: none"> <li>• Industrial revolution style of education systems</li> <li>• Our biases divide us in the workforce</li> <li>• Exploitation of human labour</li> </ul>	<ul style="list-style-type: none"> <li>• Our biases are fuel to better dialogue and understanding</li> <li>• Employee centric policies</li> </ul>
<b>WORLDVIEW</b>	<ul style="list-style-type: none"> <li>• Hierarchical</li> <li>• Top-down</li> <li>• paternalistic</li> </ul>	<ul style="list-style-type: none"> <li>• Human centered</li> <li>• Inclusive</li> <li>• Belonging</li> <li>• Teamwork</li> <li>• Mutual success</li> </ul>
<b>METAPHORS &amp; MYTHS</b>	<ul style="list-style-type: none"> <li>• Imposter syndrome</li> <li>• Working for ‘the man’</li> <li>• My department, my rules</li> <li>• Every man for themselves</li> </ul>	<ul style="list-style-type: none"> <li>• Bottom-up</li> <li>• We’re all in this together</li> <li>• What's good for the goose is good for the gander</li> </ul>

Table 3: Causal Layered Analysis, Traditional Business Practices and Learning Organization Business Practices

When these two CLAs are compared, they present as the inverse of one another. Traditional business practices place emphasis on the individual and their set of tasks within the

organizational structure, where the Learning Organization is a team-based, systems focused approach that highlights the wholeness of the working experience.

The worldview discourse in the second CLA integrates the concepts of inclusivity and belonging. These are directly related to the framework presented by Maslow in the hierarchy of needs. The hierarchy of needs from the Indigenous Peoples of the Blackfoot Nation in Alberta, Canada, is the basis for Maslow's hierarchy (Safir, 2020). Commonly seen in a pyramid, the levels of needs are outlined in the following order: physiological, safety, love and belonging, esteem, and self-actualization (Safir, 2020). The unmet needs of employees in the workplace begin with the safety component: mental health is suffering and is quoted as a primary unmet need in the workplace (Stier & Driggs, 2021). It is critical that this is addressed before a workplace culture that truly supports love and belonging can be created.

The Causal Layered Analysis can begin to draw the parallels between what it is that employees are demanding through the grouping of employee needs and start to understand what an organization needs to be and what it needs to have to be able to meet the expectations of employees prevalent in the current job market. Gallup headlined one of its recent web pieces as "The 'Great Resignation' Is Really the 'Great Discontent'" (Gandhi & Robison, 2021). The language in this distinction is an important factor in understanding the employee sentiment towards work and the workplace. The unmet needs of employees are taking precedence over any needs that may be met. The same Gallup study finds that it takes more than a 20% pay increase to lure an employee away from a manager who engages them appropriately, which demonstrates that employee needs are far more than monetary compensation for the employee to be happy and satisfied with their employment.

People want to be included, brought along for the ride. The Learning Organization framework outlines broad theme concepts about what that means. It's as relevant today as it ever was. Central to a successful implementation of a Learning Organization is the organization's willingness to invest in how people work and want to work, and to follow through with it. A successful implantation is about commitment to long-term integration and practices, not only implemented policies without follow-up. Organizations must implement hiring practices that target the right behaviours, not only skills, in order to have the right people at the table to understand the process. While many practices may be criticized for "getting in the way of the work," we have to ask: What is the work? The intangible and immeasurable results of committing resources (people and time) to those practices may pay off exponentially. Avoiding errors, reducing miscommunication, and building relationships are the outcomes of a successful organizational structure, but may not address the culture to get there. "We should not limit ourselves to assessing whether its original relevance is intact but also consider the possibility that it might have gained fresh relevance in new contexts specific to our time" (Hansen et al, 2020). If we take to defining that current working practices are not a set of tasks to be checked off on a list, but instead are the bringing together of people to common goals, uniting teams around purpose and vision, and working together on completing a mission, then the work takes a new form in the view of interpersonal relationships.

## CONCLUSION

The advancement of our society and culture necessarily follows updates not to "what" we are doing but "how" we are doing it. Organizations are centred around providing goods and services to the consumer, but this can be accomplished in a multitude of ways. This research is proposing that the employee experience in this process is critical to the organizational success that is expected. We do not need to reinvent the approaches holistically to be able to keep up with modern challenges in changing times, however we do need to alter how we implement them in order to be successful for the future. Critically, we need to evaluate our willingness to follow through on implementing the tenets that are outlined for a Learning Organization. A deep and true commitment, leaders wanting this for their organization, for their people, and considering it the right thing to do are intrinsic in being able to execute against this appropriately. An organization's success, or failure, is likely to be determined by the people working towards the organizational goals, and not the consumer on the other side of the equation.

An organization that is able to respond to external stress is a resilient organization, and may also be a Learning Organization, where a Learning Organization is always a resilient organization. Importantly, an organization needs to dig into its principles and values during turbulent times to ensure successful outcomes. Denyer (2017) states that "resilient organizations do not restrict resources when dealing with threats to their existence", in trying to restrict the autonomy and flexibility that employees have come to trust, there are serious consequences to the trust that was built. Organizations that abandon their principles in turbulent times and revert to authoritarian practices will see negative consequences from their employees. When resilient practices are abandoned (ICOR, n.d.) employees are prone to increased stress. The American Psychological Association (2020) states that 67% of adults have experienced increased stress over the course of the pandemic.

What we are seeing in the causal layered analysis is that employees are not feeling as if their psychological safety is secure, and organizations with high employee quit rates are not listening to their employees. This is seen when employees quote that mental health and wellbeing are prime among their unmet needs (Stier & Driggs, 2021). What quitting employees are saying is that their needs are not being met by their workplaces and they are willing to look for an employer that is better aligned with their values and able to provide for their needs. Following Maslow's hierarchy, based on the systemic beliefs of the Indigenous people of the Blackfoot Nation in Alberta, Canada (Safir, 2020), if leaders focus workplace culture on Love and Belongingness, followed by Esteem, and eventually Self-Actualization, they are able to elevate the employee experience of workplace culture to new levels (Senge et al., 1994, p24). The pandemic being a catalyst of change may have regressed any workplace culture of Love and Belongingness as individuals became isolated and issues of mental health and wellbeing crept into daily life. In order to restore the missing pieces, leaders can focus on team learning and shared models. These disciplines bring the individual into the whole, where they can nurture belonging and grow from there.

The Learning Organization framework offers a system of workplace culture that addresses employee needs and creates an environment for love and belonging. The Learning Organization's core disciplines speak to the very nature of employee engagement and empowerment. When fully integrated as business practices, the organization is able to benefit from its own created resilience to external stressors, with employees that are committed to the organizational goals. The models, templates, use cases and frameworks exist in many forms and a diverse outline is presented in *The Fifth Discipline Fieldbook* (Senge et al, 1994). There is a deep commitment needed by the leaders of organizations to commit to a long process, where it is often difficult to measure specific success. The leaders of the Learning Organization transformation need to be on the ground and in the room with their teams to see it happen. The "How" to accomplish this begins with a leadership team committed to implementing an employee-centric system of thinking, perhaps based on *The Fifth Discipline* (Senge, 2006), but critically that it is thoughtful and listens to the employees of that specific organization.

Employees have a buyer's market for the roles they are willing and able to do. Employees hold the power to hold their employers accountable for the working conditions and the environment that is being created. With technology platforms at their fingertips, the likes of LinkedIn, Glassdoor, and Indeed as work-centric websites dedicated to sharing and building communities of workers have made it exceptionally easy to share experiences, both good and bad, about organizations, leaders, and companies. The easy access to information cannot be taken for granted as organizations will develop followings through their reputation. Equally as important as the employee point of view is the consumer's view of an organization as the general public can consciously choose who to buy from or conduct business with. There is no more hiding for any organization that claims to do good if such claims are false, their employees will quickly correct the record.

Further research on this topic could look at current-use cases of successful implementations to extract an updated functional model that meets employee needs that can be adapted for the circumstances of that organization. There could also be an analysis of different types of organizations that were not considered in this framework because they have only emerged in the last 20 years, including digital media, and remote work (distributed team) frameworks.

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