

**The Berkana Community of Conversations:  
A Study of Leadership Skill Development and Organizational  
Leadership Practices in a Self-organizing Online**

by

**Marilyn L. Hamilton**

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*The Berkana Community of Conversations: A Study of Leadership Skill Development and  
Organizational Leadership Practices in a Self-organizing Online*

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## ABSTRACT

### THE BERKANA COMMUNITY OF CONVERSATIONS:

#### *A STUDY OF LEADERSHIP SKILL DEVELOPMENT AND ORGANIZATIONAL LEADERSHIP PRACTICES IN A SELF-ORGANIZING ONLINE MICROWORLD*

By Marilyn Hamilton, Ph.D.

Wheatley, Kellner-Rogers, Erickson and Woolf convened the Berkana Community of Conversations (BCC) as a seven month listserv experiment in 1997, for the purpose of connecting people to explore the question, “What are we learning in theory and practice about creating organizations that support people in their new understandings and capacities of being human in a living systems worldview?”

The researcher was a participant in the experiment. The experiment effectively became a microworld of three hundred people and a case study of leadership emerging from, and co-evolving with an environment, and an environment co-emerging with the leadership.

The purpose of this research was to answer the following research question.

**“Was the BCC a self-organizing microworld where participants developed leadership skills and learned organizational leadership practices?”**

For the purposes of this research a microworld was defined as follows:

1. A self-organizing system that simulates the complex adaptive behavior of an organization.
2. A micro-computer based “small world” of an organization that follows certain rules of engagement.

Based on theories developed by Maturana and Varela (1992), and Wilber (1995), the researcher used language and relationships as the key source of evidence.

Leadership in BCC was demonstrated to be a continuum of behaviors that created effective processes for meaning making, action/direction and accomplishment. Using the researcher's map, meaning making was tracked in: four directions (quadrants); three types of connections (exploratory, transformative and linking) and six plus levels. The researcher identified three characteristics of leaders: 1) they initiate patterns; 2) they develop patterns; and 3) they create connections. BCC data confirmed that the more connections one makes the more likely one is to become a leader. BCC showed that leadership is an evolving process to make meaning for the self and the group.

Order emerged in the system through learning. Learning was tracked using a developmental scale based on the deepening of consciousness tracked in Wilber's four quadrants of reality: intentional, behavioral, cultural and social. BCC demonstrated that life creates connections, which create meanings (patterns), which create relationships, which create an identity. The methodology created a means for mapping the ontogeny of community learning within the organization.

Organization emerged in BCC when meaning was made by the participants. The experiment showed that organization leadership practices need to pay attention to the process of meaning making and creating conditions that encourage rich, redundant, reflective and supportive communication. Effective organization leadership practices created safe places for meaning making to happen and for a sense of community connectedness to emerge.

BCC was confirmed to be a self-organizing, microworld with a capacity: to survive during the seven months; to structurally couple with its environment (lives were influenced in order to participate and as a result of participating); and to reproduce (twelve new listserves were created during the experiment and four listserves endured for longer than one year beyond the end of the experiment).

The researcher concluded that the value of a microworld is that it can replicate the kind of action-based learning situations that organizations and leaders both need to learn new ways of leading and organizing.

The results of the research can be applied to: the study of microworlds as learning environments; mapping systems for shared meaning making; designing curriculum for learning that deepens consciousness; assessing intellectual capital in organizations; cross-cultural learning; and informing the practice of journalistic reporting about leaders.

Much further work is suggested by this study including: methods for examining assumptions underlying meaning making; connection creation through peak experiences; balancing development in the four quadrants; and an exploration of the energetic nature of transformation.

# **THE BERKANA COMMUNITY OF CONVERSATIONS:**

*A STUDY OF LEADERSHIP SKILL DEVELOPMENT AND*

*ORGANIZATIONAL LEADERSHIP PRACTICES IN A*

*SELF-ORGANIZING ONLINE MICROWORLD©*

A DISSERTATION SUBMITTED TO  
THE FACULTY OF THE SCHOOL OF ADMINISTRATION AND MANAGEMENT  
OF COLUMBIA PACIFIC UNIVERSITY  
IN CANDIDACY FOR THE DEGREE OF  
DOCTOR OF ADMINISTRATION AND MANAGEMENT

By

**Marilyn L. Hamilton**

### **DECLARATION OF AUTHENTICITY**

I declare that all material presented to Columbia Pacific University is my own work, or fully and specifically acknowledged wherever adapted from other sources. I understand that, if at any time it is shown that I have significantly misrepresented material presented to the University, any degree or credits awarded to me on the basis of that material may be revoked.

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## **Dedication**

To all the Communities in my life.

## ACKNOWLEDGMENTS

### **My wholehearted appreciation to:**

The guidance, inspiration and nourishment of my Creator.

My husband Peter Dobson for embracing me for who and what I am.

Meg Wheatley, Myron Kellner-Rogers, Tenneson Woolf and Sheryl Erickson for making meaning with questions, poetry and connections.

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## **1. Background**

### **1.1 Why Does the Current Organizational Environment Exist?**

“The mechanistic image of the world is a very deep image, planted at subterranean depths in most of us.” (Wheatley and Kellner-Rogers, 1996)

Most organizations and the people within them are blind to the beliefs on which their organizations are based. They do not know, or they do not remember that the scientific philosophies, discoveries and methods created by Bacon, Descartes and Newton rested on the point of view that the universe, the world, society and the organizations within them, operated like machines. Indeed, even the individuals within these environments were treated as machines. This mechanistic view of the world created an order to life which generated over time, industrial systems, modern government and social relationships. By the twentieth century this worldview also produced levels of control and command that were particularly visible in hierarchical systems of all kinds: big government (both communist and democratic); government run educational and healthcare systems; mass manufacturers; multi-national corporations; as well as the military and judicial systems. Most people, in these hierarchical mechanistically designed systems, accepted the command and control framework and stability, that these systems provided, until the middle of the twentieth century.

At the beginning of the twentieth century, however, scientific discoveries created a new platform from which to view the world. In a variety of fields from physics to chemistry to biology, scientists uncovered a wide spectrum of evidence that suggested that the predictability, certainty and mechanistic paradigm of classical physics, ought to be interpreted within the context of the probability, uncertainty and living systems point of view that Einstein, Bohm and Lovelock proposed. (Capra, 1996)

As the understandings of these new sciences of complexity have deepened in the scientific community, other sectors of society have started to assimilate the new assumptions into their structures, processes and patterns. And as this worldview has gradually permeated various regions of the world, cultural strata and individual understandings, organizations have begun to respond in a variety of ways.

One of the most immediate influences on organizations has been the assimilation of the products of this new science. Military and manufacturing systems have applied the new sciences to develop new weapons, new materials, new food production processes and new technologies of transportation and communication. The technologies of transportation and communication, in particular, have enabled the increase of connections at every level of scale in the world. This massive explosion of connecting power has made information exchange possible, visible and accessible to such a degree that it has de-stabilized the old world of Bacon, Descartes and Newton.

When the world could literally be viewed from the moon, because technological development made it possible for humans to travel there, and share the event live on global television networks, the ordinary person was directly touched by the effects of the new science.

Within fifteen years, a different application of the same technology that made possible the moonwalk, put the power of computing at the disposal of these same individuals. This capacity for the individual to leverage his/her thinking power shifted the balance of knowledge power from an elite (those who teach) to a broad base of humanity (those who learn). (Drucker, 1996; Toffler, 1990)

This wide distribution of new knowledge generating capacity, has gradually transformed the metaphor of the stable, old, machine-based world, into an image of a new, dynamic system, living on the edge of chaos. (Capra, 1996; Wheatley and Kellner-Rogers, 1996; Youngblood, 1997)

Moreover, the scientific discoveries and applications that have been changing the larger world environment, have also simultaneously been changing the bio-physical and conscious environments of the individual. In fact, the development of technology in the twentieth century has changed the relationship of the individual to the technology of learning. Not only did the invention of the computer increase knowledge processing capacity, but it also expanded knowledge connection capacity. Facts, patterns, people and cultures have become connected on a level that only science fiction writers could imagine in 1900. Teenagers entering the twenty-first century take for granted that their lives literally embody (the effects of) radio, television, high-density storage technologies (eg. CD ROM's), micro-computers, cellular telephones, application software of all kinds, and computer-based simulations – none of which had been invented at the start of the twentieth century.

Likewise, the availability and exposure of individuals to deeper levels of knowledge in all fields, and a multiplicity of connections around the world, has accelerated the development of consciousness and the integration of emotional, psychological and spiritual growth. (Wilber, 1996) As more people have deepened their interior lives, they have connected with others who have also done so, and these connections have in turn leveraged levels of creativity, versatility and flexibility.

Coming full circle, back to the organizational structures from which this amazing post-modern growth has emerged, it has become evident that because of the interconnected, accelerating levels of change in the world, that the old forms of organization are not serving individuals, societies or the world well. The old forms have prevented connections (eg. racial intolerance), created blindspots (eg. dependence on technological solutions), produced dysfunction (eg. addictions and pollution), destroyed identity (eg. genocide), and obstructed change (eg. illness prevention). (Naisbitt, 1990; Toffler, 199; Drucker, 199; Youngblood, 1997) However, because of the wide availability and visibility of emerging information about organizations in existing networks, individuals within the organizations have become aware that alternative forms of organization are possible, if not desirable. Particularly over the last decade, many have experimented to change organizational structure, developing and applying such techniques as re-engineering, change management , down-sizing and teaming. However, the majority of the proponents of these approaches have failed to recognize the deep-seated metaphor of the organization as machine, which underlies most of these experiments. Thus, while many scientists and individuals are working and living from the new living system worldview, most organizations remain stuck on a machine treadmill, exhausted by the metaphor that alienates them from their workers and their environment alike.

As a result, people are seeking new ways they can relate to organizations and new forms of organization. Organizations (Boards and investors) are seeking new leadership. Leadership is feeling uncomfortable (or even betrayed) by their existing organizations as well as by the workers they believe they should be leading. Ironically, new science

teaches us that individuals and their environment co-evolve; i.e. individual qualities emerge out of the environments in which they exist and environments, in turn, are co-created by the individuals in them.

Thus, we are at a paradoxical time of history, where the environment has changed so greatly that we long for (call for, demand) leadership and bemoan the fact that it does not arise. At the same time, because of the change in the environment, we may well be in the position where we don't recognize a new form of leadership among us, because it has been shaped by the evolving environment of which we are a part. Though we have accepted the products of the new sciences for our personal comforts and pleasure, we have not changed the machine metaphor by which we view leaders and organizations. We have not questioned the conflict and/or the lack of integration in our belief systems. Thus, we lack discernment (i.e. new metaphors or worldviews) to recognize new forms of leadership which may be emerging around us.

At this point in our development as individuals, organizations and cultures, we are ready to ask the questions:

- How can we discover the leadership we need?
- How can we create the environment; i.e. organizations who will support us in our new understandings and capacities (our new living systems worldview of what it is to be human)?

## 1.2 Why Did Berkana Create the Community of Conversations

### Experiment?

“We all need one other to explore these ideas. Each of us contributes our experiences and thinking to one another as we try to understand the world differently. We are essential to each other’s inquiry. We welcome you.” (Wheatley and Kellner-Rogers, 1996, p.2)

“If we can be in the world in the fullness of our humanity, what are we capable of? If we are free to play, to experiment and discover, if we are free to fail, what might we create? What could we accomplish if we stopped trying to structure the world into existence? What could we accomplish if we worked with life’s natural tendency to organize? Who could we be if we found a simpler way?” (Wheatley and Kellner-Rogers, 1996, p. 7)

Wheatley and Kellner-Rogers created the Berkana Institute, in 1990 as a 501-C3 charitable educational and research foundation that seeks to create communities of support and inquiry for exploring new thinking and practice about organization. “The central question for the Institute’s activities is: ‘What can twentieth-century science teach us about twenty-first-century organizations?’ Through formal dialogues and experimental workshops, Berkana [creates] new science applications for organization design and change.” (Wheatley, 1992)

The BCC was born out of the convenor’s search for “a simpler way” to develop organizations and to support leaders as they developed. Wheatley and Kellner-Rogers had spent years researching, writing about and applying in their consulting practice, the principles of the new sciences. (Wheatley, 1992) In particular, they were fascinated by the potential of applying concepts of living systems. In 1996 they expanded their vision and summarized their thoughts and their search regarding the challenge of applying living systems concepts to organizational structures, processes, identities, and relationships, in their book, “A Simpler Way”.

In the process of promoting the book, the authors met sister BCC convenor, Sheryl Erickson, who arranged workshops in key cities across the U.S., in 1996, which the authors facilitated. Erickson, also had been thinking deeply about the issues of organizational development as a result of her own career experiences.

“For twelve years I worked as an external consultant .... These years were primarily in the public sector, in state and local government, education, healthcare and human services.

“For eight years, I worked at Innovation Associates, a consulting and training firm now associated with Peter Senge and the learning organization field. I have also been closely connected with Peter and the MIT Organizational Learning Center as well as a constellation of 7-8 companies tied in with Peter.

“Over the past 5-6 years I have entered this period of very deep and disturbing questioning, eg. questioning even the most basic assumptions about organizational change, consulting, the expert model, models in general, how anything comes into being. Here’s where I have been living for awhile:

- the tools, techniques and models that had become a “badge of office” in the world of organizational consulting began to appear wooden, without life, even another form of manipulation
- the experts were not practicing what we preached. Our role was to tell others how to do it; not to do or be it ourselves.
- the system or game of consulting and training seems fundamentally a perpetuation of hierarchy, ever-increasing consumption and greed. Those “who know” seem more and more separate from those “who do not”.
- thousands upon thousands of dollars seem to be passing between hands with little relationship to result or change. The word “intervention” seems curiously out of sync with how things really shift, reconfigure, move along or happen.
- I have felt like I was participating in a grand illusion or self-delusion of some sort. What changed in organizations seemed curiously meant to happen whether or not a consultant or expert entered the scene.
- Increasingly people seem to become more alienated from themselves ... who we are, what we want ... what we already have within our own grasp to accomplish.

“This is why I am so intrigued by how natural systems work. And increasingly eager to understand the flow and forces of history. ... That is why I enter this circle ... I know that in this questioning and challenge of thought, that I will most fundamentally see myself ... how I create my own self-imposed limitations and collude to perpetuate the traps of living in a way that is not at all what I care most deeply about.

“ How can we find another way ... a simpler way ... a way more in keeping with Nature and with life itself? A way of integrity. A way of grace.” (B, 03.97)

As the authors and their promoter worked together, they formulated the idea of an experiment, patterned on the success of similar formats created by Erickson. They had a

sense that there was another way to talk about leadership and another way to tell the story of organization and leaders.

Kellner-Rogers describes what they set out to create.

“[We wanted to create] a connection between people around the world. Meg and I have been asking (deeply inquiring) “what is our work?” Through our work we met many people in lots of places who were exploring similar questions. Most people felt very isolated. BCC was one of many experiments that Berkana could start to help people connect.

“We started a whole bunch of experiments - BCC was one, Portland Self-Organizing Systems workshop was one, the book was one -- in the future there will be more. We wanted to connect and learn about one another.

“We see a new story emerging. We want to tell stories through the new lens eg. when people do something in community, it often / usually gets reported through the old lens. In a crisis, the media reports that such and such a leader individually did something. When in fact we know many people self-organized to do many things. We want to tell that story differently.”

So at the basis of the convenors’ inquiry was the purpose of connecting people to one another and simply seeing what would happen as a result. Each of them brought to the experiment an existing network of connections, embodied in mailing lists. Further, they had enlisted the book’s publisher to promote on the book jacket cover an invitation to the BCC experiment.

Thus, it can be observed that the experiment itself seems to be an example of leadership (exemplified by: readiness, willingness, motivation, experience, creativity, development, curiosity) emerging from and co-evolving with an environment, and an environment (represented by: the opportunity for the experiment, promotion network, and physical, fiscal and electronic means) emerging from the leadership.

### **1.3 Why Create a Microworld?**

“We each create our own worlds by what we choose to notice, creating a world of distinctions that makes sense to us. We then “see” the world through this self we have created. Information from the external world is a minor influence. We connect who we

are with selected amounts of new information to enact our particular version of reality.” (Wheatley and Kellner-Rogers, 1996, p. 49)

As organizations have begun waking up to the realities of the new worldview, they have realized that the conditions of change which have become their norm, put them at the edge of chaos. In borrowing from living systems sciences, Senge (1992), Wheatley (1992), Youngblood (1997), Hock (as quoted in “Training and Development”, 4.97), and Palmer (1998) have proposed that one of the key practices that will enable survival of organizations in these circumstances is continuous learning. The proposition that organizations must continuously learn has lead them to examine how learning has happened in the past.

Bennis and Nanus were early observers of this learning process. They noted (1985, p. 219):

“Management education’ is, unfortunately the appropriate description for that which goes on in most formal educational and training programs, both within and outside universities. Management education relies heavily, if not exclusively, on mechanistic, pseudorational ‘theories’ of management ... The gap between management education and the reality of leadership at the workplace is disturbing...”

Youngblood (1997, p.21) documents the context in which traditional management and leadership skills were developed. He cites Max Weber’s model of bureaucracy.

1. “A clear-cut division of labour
2. A hierarchy of authority
3. Recruitment of managers based on technical knowledge and expertise
4. An explicit set of rules for making decisions
5. A strict separation of business and personal concerns

6. The establishment of career employment.”

The contrast between what behaviors were expected by management in the bureaucracy and what behaviors were needed by leaders wanting to operation in the new paradigm was summarized by Anderson. He compared the machine-based task/result orientation of old-style managers with the people/process orientation of new living system leaders (see Table 1).

Table 1: Management vs. Leadership Orientation

<b>Management: Task/Result Orientation</b>	<b>Leadership: People/Process Orientation</b>
Present focus to ensure results	Future focus for accomplishing a higher purpose
Day-to-day operations	Personnel selection, orientation, performance management
Administering policy	Envision end-states process
Specifying procedures	Creative planning and shifting
Data-based decisions	Team building and team development
Problem-solving	Relationship and culture building
Planning systems	Motivating and rewarding others
Decision making	Creatively applying research information

Source: Anderson, 1998, p. 43

Management science (and its resulting “scientific” identification of management skills) evolved from the theories of Adam Smith (who proposed division of labor in “Wealth of Nations”; Charles Babbage who proposed time and motion studies); and Frederick Taylor (the creator of the modern production line). Most management experts consider this lineage of management theory utilized the machine metaphor as the ideal model for worker and management performance.

Drucker (1993) paints a different genealogy of “knowledge work” and casts an alternative picture of Taylor’s insights and influence.