Reflective Notes: a tool for individual and team learning

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A continual challenge in organizations is to act with the big picture in mind. Organizational life does not allow for time to think things through. Actions must be taken and often they must be done quickly. There is no time to think about future implications. We simply act in the here and now. Managers and employees must learn to act in the here and now and consider future implications – at the same time.

A cross-functional product development team at Harley Davidson created a tool they named Reflective Notes to facilitate team members in learning to take time to reflect on ideas and actions, to assist the team in learning to understand one another across disciplines, and to lead to a higher level of performance as a group. Pioneered by Marty Castleberg (Senge *et al.*, 1999) and further developed by this author, Reflective Notes are a tool to enhance the learning process for those who are committed to learning over time. The Notes are a mechanism to develop big picture thinking by making reflection a regularly used skill. This method utilizes a reflective analyst who observes and captures team meetings in a way that adds value to the ongoing conversation and learning of the group.

Reflective Notes are used in a meeting setting and are a type of summary of a meeting. They are not minutes in the traditional sense. While they do capture what was said and agreed on, they are much more than minutes and they do not have the formal minute taking structure. The Notes provide a written perspective on not only the content of the meeting, but also the process.

Reflective Notes are also a repository of information on complex and dynamic issues that groups, and individuals in them, undertake over time. In a sense, the Notes provide a collective conscience of a team.

The process of collecting reflective notes

Reflective notes work best with a work group or team that meets on an ongoing basis. Since team members need to be engaged in the dialogue and workings of the team, each time a team meets, in addition to the regular group members, a reflective analyst sits in as a silent member of the team. The analyst's job is to listen, observe, record, and then to create the reflective notes. The analyst takes note of conversations, of nonverbal cues – what is said and what is not said – what is avoided, and of who is present and who is not. She then reflects these data back to the participants through reflective notes that provide perspective and provoke reflection.

After reflecting on the meeting herself, the analyst begins the notes with a statement of the theme of the overall meeting and then may discuss any sub-themes that emerged during the session. For instance the main theme of the meeting may have been about how to resolve a specific problem, but during the meeting an ancillary conversation occurred about how

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communications take place between departments. Both topics would be observed with the second one as a sub-theme.

Observations or statements of specific things that happened during the meeting follow the introductory theme segment. For instance, during the discussion one of the participants may have created a visual image that describes a specific phenomenon in his or her mind. He may have drawn it on a flip chart for the edification of the entire group. This should be included in the notes. Another paragraph or two might describe a specific conversation regarding an event that highlighted an obvious controversy. When the discussion got tense, the subject was changed and the disagreement abandoned. This group dynamic could be reflected to the team in the notes. Headings for each topic may be created to pique interest or provoke reflection.

Building on what has been illuminated thus far, the analyst next poses provocative reflective questions to encourage readers to think beyond the boundaries of what they experienced at the meeting. Why did the conversation about a particular topic take the turn it did? What were the unspoken issues that were skirted or avoided entirely? What might be the unintended consequences of a specific course of action?

Finally, the analyst lists action items agreed on by the team and provides a suggested listing of what might be considered next in order to facilitate reflective capacity and team learning. This is not necessarily an agenda for the next meeting and indeed the team may decide not to address items listed or to even just ignore them thereby providing a potential item for future reflective notes asking why the team decided to ignore a suggestion.

Once composed the reflective notes are shared with the entire team. Members are asked to read them prior to the next meeting. Copies of the notes are also distributed at the next meeting. To connect the previous session with the current one, prior to calling the group to order, members take the opportunity to reread the notes so they are fresh in their minds. The first order of business is a "check-in" where each member takes a minute or two, and sometimes longer, to state the things on his or her mind. Often, since the notes have just been reviewed, something in them becomes a part of the check-in thereby reflecting an item of significance for that individual. Others may build on the observation.

Historically, reflective notes emanate from theories of adult learning that posit that people best learn by integrating their lived experiences with new concepts they encounter. Most directly applicable is Mezirow's (1990) concept of critical reflection. Mezirow defines reflection as the process of examining the justification of our beliefs in order to guide our actions or to reassess the effectiveness of our approaches to problem solving. Critical reflection then allows us to assess the validity of our presuppositions. Reflective notes provide a lens to permit us to reflect back a different picture of who we are and what we do and what we say often leading to a transformation in our beliefs.

The second foundation of Reflective Notes comes from the practical application of learning histories. A learning history tells an organization's "story" from the perspective of the people involved (Senge *et al.*, 1999). It is created by consultants who act as learning historians to

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gather data from the many participants of the organization. The historians compose a living history of the organization. It is an extensive and time consuming process that helps people remember or learn how and why the organization became what it did.

After going through a learning history process at Harley Davidson, a product development team wanted a tool that would allow them to learn on an ongoing basis. As a result Reflective Notes were developed. As a tool it provides a way not only for individual members of the team to learn about themselves, but also for them to learn from other perspectives of the same phenomenon, and for the entire team to develop a new level of learning and performance.

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Learning styles,
Team learning

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