

**“USE THE NEEDS OF THE OTHER PERSON AS YOUR
MENTOR”
- HARTMUT VAN JEETZE**

**DOING AND THINKING WITH A PURPOSE
FROM A COMMUNITY CENTRIC
FOUNDATION.**

Lessons Useful for School Reform

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PERSONAL AND ORGANIZATIONAL CHANGE PROCESSES

Over the course of several months I explored several experiences and books. The purpose of this work is to bring several bodies of knowledge together and apply them to educational reform. Three sources are qualitative and come from workshops. The Reflection Friendly Situation is a think tank held in Madrid New Mexico. The Future Search Conference is a planning event held in Colorado Springs, Colorado. The third workshop is a facilitators workshop held in Toronto Canada. Three sources are more quantitative and come from books. Leadership and the New Science written by Margaret Wheatley compares organizational development with the theories from the science of Chaos. Discovering Common Ground written by Marvin Weisbord chronicles 30 years of experience using search conferences as a means of organizational change. The third book, The New Meaning of Educational Change by Michael Fullan, is an exhaustive literature review and interpretation of school reform efforts over the past thirty years.

Following is a brief description of the essence of each source as it applies to change and reform. The next section combines all the source information. The Meaning of Educational Change is used as the focal point. Each of the other sources are brought in as support for the messages Michael Fullan has brought .

BRIEF DESCRIPTIONS OF THE ESSENCE OF SOURCES

Reflection friendly situation.

The use of peoples homes as environments to reflect, think and create in are available and useful. Tools such as the Support Circle (attached) created by Ivan Scheier can be both a source of creative thinking and of concrete suggestions. The four days of thinking produced the notion that reflection is a scarce commodity today and that we have homes to create spaces for reflection and learning. Listening to the participants produced a list of eighteen criteria for a quality retreat home.

- A place where people know what the place is (learning, solitude).
- A place that offers opportunities that people have not had.
- A place to declare what “I” need and receive consideration for that need.
- A place where no outcome is expected.
- A place that results in action.
- A place that designs the environment for the people I come with (gender, race, culture, etc).
- A place for space for vast reflection.
- A place that is safe (physically, spiritually, emotionally).
- A place that offers structured learning.
- A place that mixes community members and community activities with learners and reflectors.
- A place that develops understanding.

- A place where facilitators, teachers, and leaders reflect and learn as much as participants.
- A place that views the various realities happening at one time and makes use of these realities for learning and the building of community.
- A place that creates networks.
- A place where all who have gathered work for the community (cleaning, cooking, etc).
- A place that carries the expectation of growth and learning for all who come (self-responsibility).
- A place that moves people to be synchronized with their values.
- A place that causes distractions from the every day hum.

All of the criteria are aimed at the break down of scarcity as an approach to change. The participants agreed that we live in a bottom line world and the narrowness of that reality develops and nourishes a culture of scarcity. One prescription for the elimination of the bottom line view is the creation of retreat residences that meet the above criteria. The outcomes of this action are to alter attitudes, create awareness and understanding, and develop personal roles of contribution.

Future search conference.

Combining the heart work with current realities and future dreams in a fanciful process motivates people to consider their roles in designing more desirable futures. This is what happened when eighty people gathered in Colorado Springs to consider what a community organization, concerned with the lives of people with developmental disabilities, should be doing. Representation of most of the parts of the system were present (professionals of all levels, people with developmental disabilities, parents, citizens). For three days the group considered their common history, their common present and their common dreams for the future. The organization changed from seeing their role as one of funding human services to one of building supportive communities. The work of the organization transitioned from solving problems for people they served to developing structures and offering resources for communities to define and solve their own problems. The perspective of stakeholders shifted from what do I need to tell them to do (policy approach) so that we can get on with our work, to, what do I need to contribute (individual community action) so that we can get on with our work?

The essence of the process was the development of a strong sense of common cause followed by specific coherent actions. Several months later evidence of a significant impact is present. A few of the alterations are;

- Volunteer boards now direct each function of the organization. These boards have decision making authority and responsibility for implementation of recommendations.
- Each function must have as many volunteers as paid staff in the actual doing.
- Every meeting starts with a brief discussion of the common cause and the values that undergird the organization.

- The definition of resources has expanded to include money, citizens, and the accessibility of community life.
- Personnel performance reviews have been replaced by individual planning for employee contributions (looking toward the future vs. Evaluating the past).
- People receiving services have started managing their own resources.

Creative Facilitation.

Facilitating groups with co-facilitators increases the likelihood of success by allowing one person to pay attention to group and individual dynamics and the other to focus on recording the images as well as the words. A structure to guide groups to action steps is necessary for actual change. In this case we used Planning Alternative Tomorrows With Hope (PATH). PATH was created by Jack Pearpoint, John O'Brien and Marsha Forest. PATH comes with one rule and three guidelines.

ONE RULE:

Never use the tool on anyone else until you have had a PATH done for yourself.

THREE GUIDELINES:

- 1) Team facilitate the process (one graphic recorder and one process facilitator).
- 2) Graphics must be used and understood. Color, pictures and creativity switch on parts of the brain seldom used.
- 3) Each question / step must be asked/ dealt with in order.

EIGHT PROCESS STEPS:

- 1) Touching the dream. What is your vision of what the future looks like?
- 2) Sensing the goal. What significant steps might you accomplish within a year?
- 3) Grounding in the now. What are the facts relating to where you are now in relation to where you wish to be?
- 4) Identifying people to enroll. What people will you ask to work with you and commit to your future?
- 5) Recognizing ways to build strength. What do you do for yourself that builds strength in you?
- 6) Charting action for the next few months. What should be done within the next few months?
- 7) Planning the next months work.
- 8) Committing to the first step.

The essence of this workshop is to work together in the use of graphics to nourish creativity. The underlying message is to use powerful tools to explore organizational and personal development only when you have experienced the process personally. This is especially useful to change agents (organizational development consultants or individual case managers) who frequently apply processes without the benefit of understanding the impact.

Leadership and the new science.

" Each of us lives and works in organizations designed from the 17th century images of the universe -- when scientists thought the world was a great machine. But science has changed. If we are to continue to draw from the sciences to design and manage organizations, then we need to ground our work in the science of our times. We need to stop seeking after the universe of the 17th century and begin to explore what has become known to us at the end of the 20th century."

- Margaret Wheatley

Margaret Wheatley says that the tons of flip chart paper produced from a traditional organizational development process does not represent the outcome. Science now tells us that prediction is not possible and most goals and objectives are based on the ability to predict outcomes. A different way of viewing the planning process (matrix attached) is necessary if we are to assist organizations in designing more desirable futures. The realities of the science of chaos (termed chaos because of our inability to view all the variables and the highly complex organization) place our role as change agents from manager of to facilitator of. Margaret Wheatley's proposal for Whole systems planning describes it best.

Whole systems planning is an approach that draws upon the science of our times. It moves us from viewing our organizations as well-oiled machines to viewing them as living and dynamic systems with innate abilities and capabilities. A renewal process, often called self-organization, invites the whole system to challenge pervasive models of organizations rooted in 17th century science.

Whole systems planning assembles relevant stakeholders and enables them to step outside of the formal organization structure. It is an approach that encourages participants to move immediately from obstructing issues and conflicts to establishing a common vision for the future. This is a major departure from traditional organization change efforts in that planning is delayed until participants find the common ground that unites them in their desire to create a better future.

Whole systems planning is a powerful antidote to bureaucracy, fragmentation, and turfism. Despite polarization and conflict that is so prevalent between various stakeholders, whole systems planning facilitates the creation of a firm foundation of common values. It provides a method for setting differences aside such that an organization's strengths can be tapped.

- From a letter by; Kellner, Rogers and Wheatley Inc, 1994. Utah.

Discovering common ground.

“We don’t want to let the purpose get in the way. Once dialogue starts, our purposes go into the shade as it were. We discover new things shining much brighter than the purpose we started with.”

- David Bohm

The use of Future Search processes to bring people together. Once together communality is used to commit to a common future and use all the diverse talents found in all stakeholders. The basis for Marvin Weisbord's work is the interconnectedness of all things. According to David Bohm, interviewed in the book, we have to understand the wholeness of the world. The current way of breaking it up into fragments is not adequate. Bohm goes on to say that in order to view the whole we must have serious and ongoing dialogue. As long as we view nature as separate parts we will approach organizational change as a series of fixable functions. When we view nature, according to Bohm, as all connected and interdependent we must begin to understand the other and know our contribution.

The essence of Discovering Common Ground is to create situations where we can suspend our opinions and judgements in order to listen to each other. The goal is to develop a social superconductivity by allowing an abundance of energy in the interchange, while keeping a low temperature. The ideal situation is one where people talk freely together without a specific agenda or purpose. The environment requires a group large enough and diverse enough to create a number of subcultures. This moves people to high energy levels, discussions of deeper issues, understanding and eventually altered awareness.

The New Meaning of Educational Change.

There is something I don't know
that I am supposed to know.
I don't know what it is that I don't know,
and yet am supposed to know,
And I feel I look stupid
if I seem both not to know it
and not know what it is I don't know.
Therefore, I pretend I know it.
This is nerve-racking since I don't
know what I must pretend to know.
Therefore, I pretend I know everything.

- R. D. Lang, Knots (1970)
taken from The new Meaning of Educational Change (pg 104)

Research shows, according to Fullan, that reform will happen if; one, we start from the realities of the particular school, two, there exists an agreed upon purpose or meaning for the changes, three, stakeholders have opportunities to reflect on and alter their roles and attitudes, and four, all stakeholders have critical contributions to make. Fullan reviews the research on educational change from a perspectives of the teacher, principle, parent, student, governments and administrators. The work is best summarized by Fullan in his ten assumptions about change;

- “1) Do not assume that you version of what the change should be is the one that should or could be implemented.
- 2) Assume that any significant innovation, if it is to result in change, requires individual implementers to work out their own meaning.
- 3) Assume that conflict and disagreement are not only inevitable but fundamental to successful change.
- 4) Unless people are going to be replaced with others who have different desired characteristics, relearning is at the heart of change.
- 5) Assume that effective changes take time.
- 6) Do not assume that the reason for lack of implementation is out right rejection of the values embodied in the change, or hard-core resistance to all change.
- 7) Do not expect all or even most people or groups to change.
- 8) Evolutionary planning and problem-coping models based on knowledge of the change process are essential.
- 9) Assume that no amount of knowledge will ever make it totally clear what action should be taken.
- 10) Assume that changing the culture of institutions is the real agenda, not implementing single innovations.” (Fullan, Michael, 1991. The New Meaning of Educational Change. Teachers College Press, NY. Pages 105 - 107).

THE FUNDAMENTAL MESSAGE OF ALL SOURCES

Nonsense can be imposed but sense must be discovered
- Victor Frankl

The common ground with the sources points to change as it relates to three fundamental realms. The importance of having meaning and purpose, the need for all stakeholders to play contributing roles and the necessity of starting from the realities of the players. The chart below represents this scenario.

Each factor is explained further. An important factor to understand is that these factors must not and can not be separated. The relationship of each is dependent on the other. The

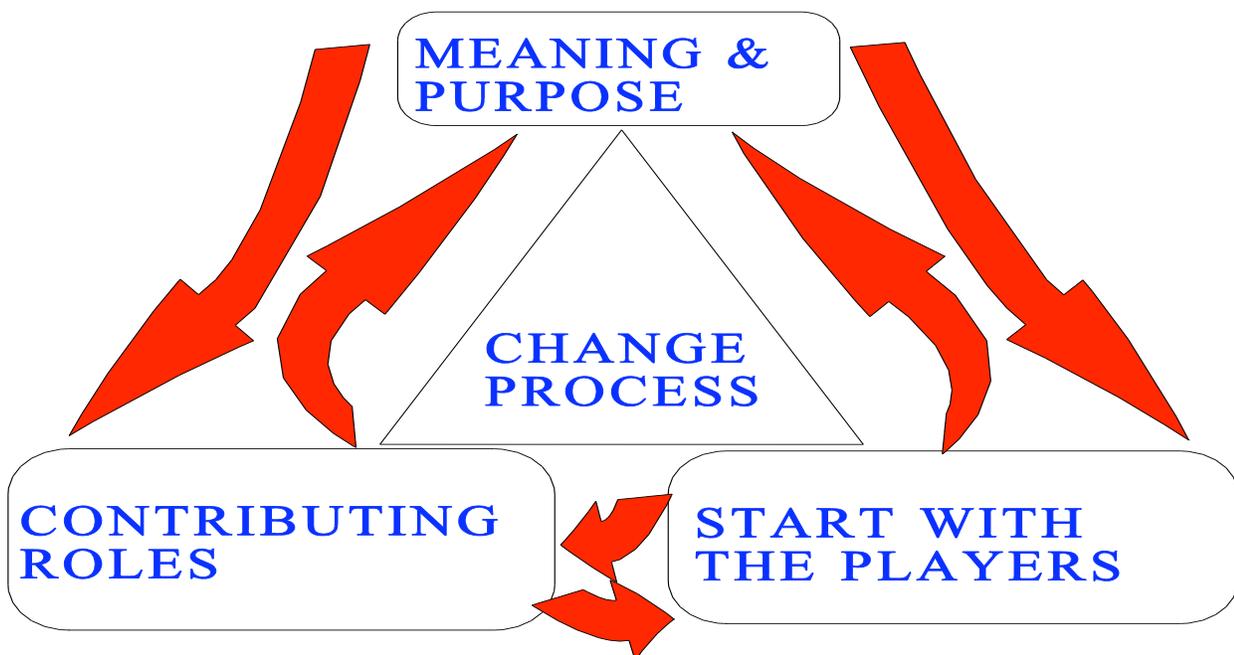
achievement of innovation and the fundamental changes required to continue to innovate are dependent on the interdependent nature of all factors.

Purpose and Meaning

Fullan speaks of the need for second order changes. Changes that alter the fundamental ways in which organizations are structured and the roles they play. One of the threads that runs through all the sources is the need for people to understand the organizations and their own purpose in the world. Marvin Weisbord restates the problems of one organization as that of the entire country. The view generated by this approach brings people to reflect on the interrelatedness of all things. This realization brings people to the table as concerned citizens as opposed to teacher in a school or activist against an organization. The relevance of an organizations goals and of an individuals work is thus related to the community, country and world. Fullan states that relevance is one of the key components of any initiated change. A major component is for people to understand the need for the change, gain clarity of the innovation, and discern the use of the changes according to Fullan.

Purpose and meaning are the heart work of any innovation. Fullan reported that successful principles used six broad categories. They took actions that:

- Improved and strengthened the culture of the school;
- Reinforced and stimulated cultural change through the use of bureaucratic mechanisms;
- Nurtured staff development;
- Engaged in direct and frequent communication about cultural norms, values and belief;
- Shared power and responsibility with others; and
- Used symbols to express cultural values (pgs. 160 - 161).



Wheatley reports, in *Leadership and the New Science*, that Victor Frankl, in *Man's Search for Meaning*, clearly stated that meaning saved lives in the concentration camps of Germany. Wheatley further states that she has observed employees using personal meaning as a method to thrive and make sense out of the chaos in organizations. In an environment where changing roles is the norm, purpose and meaning offer the only constant. A constant that keeps people, organizations, communities and especially schools moving ahead.

Start With The Players

As progressive teachers and educators, we have first to get the knowledge about how the people know.....So while I insist on starting where people are, that's the only place they could start.

Paulo Freire & Myles Horton pg. 98 & 99
We Make The Road By Walking

Fullan reported a study by Mortimore (1988) that observed purposeful leadership when the head teacher understood the needs of the school, was actively involved in the work and did not exert control. This leaves room for control to be exerted by those teaching and learning. When stakeholders feel they are in the position of control more progress is made. Fullan reports that when parents were involved in the work of the school, students developed better attitudes toward their work. According to Weisbord the stage is set early as to the involvement and attitude of the players. The opening moments of a process are critical. It is this time of opening, according to Weisbord, that people's need for inclusion must be considered as genuinely important. This creates the expectation for the people to lead the way, be responsible for the progress, and generate information influencing new directions. One of Fullan's main factors of initiation is that innovations get initiated from many different sources and for different reasons. The environment of inclusion is crucial for this factor to remain viable.

Contributing Role

One of the important tasks we should have as teachers should be not to have the experience on behalf of the students (Horton & Freire, 1990, pg.36).

According to Fullan the role change is a far more important innovation than any specific program innovation. This is true for all stakeholders. The change in roles creates great ambivalence even among those who are willing to try. Fullan underscores this when he finds that if educational change is to happen, it will require that teachers understand themselves and be understood by others. When a major preoccupation of teachers is control and discipline the role of discipliner is stronger than the role of teacher and learner. William Bridges, in *Managing Transitions*, teaches us that when innovation is approached the change is resisted because of the lack of understanding about the loss of old roles and the shape of the new roles. Because of this the transition is feared and the innovation resisted.

Fullan reports that Goodlad (1984) states that learning appears to be enhanced when students understand what is expected of them. Expectency is one step on the path to contributing. From all sources, and especially Fullan, role expectancy is a major factor in bringing stakeholders together to share in the work. Fullan found, for example, when parents were expected to play an active role they did and a difference was observed. When parents were not invited to play a role they did not and the performance of the school reflected the loss of a critical player.

CONCLUSION

“Individual and institutional renewal, separately and together, should become our *raison d’etre*....we should accept nothing less than positive results on a massive scale.”
(Michael Fullan pg 354).

Doing and thinking with a purpose from a community centric foundation is our hope for institutional renewal. Bellah, et al, in *The Good Society*, reveal five themes for institutional renewal that summarize all the sources reviewed. The context for these themes is found in the pattern of cultivation. We must cultivate a pattern that results in a social and environmental balance, a recovery of meaning and purpose in our lives together, giving attention to the natural and cultural endowment we want to hand down to our children and grandchildren, and avoiding the distractions that have confused us in the past.

The five themes are:

- 1) Paying attention & calling on all of our resources.
- 2) Understanding the larger context of our lives.
- 3) Labor equality & a balanced burdened.
- 4) Dignity & worth for all citizens.
- 5) Avoiding isolation, individualism and distantiation.

ATTACHMENT #1

OBJECTIVES OF WHOLE SYSTEM PLANNING.

To create common ground understanding of the organization's changing environment.

To create common ground understanding of the organization's capabilities, strengths, and weaknesses.

To develop a common and realistic perspective of critical relationships with key stakeholders, and to create an environment in which these relationships are continually reassessed.

To enhance organizational adaptability such that the organization increases its ability to respond to the environment in real time.

OUTCOMES OF WHOLE SYSTEM PLANNING.

A more common appreciation and understanding of organizational identity, vision, and values, each qualities that free system members to contribute to a naturally emergent order.

The common identification of key stakeholders and an appreciation and understanding of these critical relationships.

Increased diversity in the voices represented in strategic planning, and thus, stronger commitment toward implementation.

An organization that is committed to action and a common feeling that the desired future is possible, doable, and within reach.

KEY ASSUMPTIONS OF WHOLE SYSTEMS PLANNING.

All organizations have capacity and natural tendency to self organize.

Self-organization enables a system to best tap and grow its potentials.

The organization must pool internal and external expertise to create a process that enhances the organization's self-organizing capacities.

External consultants gradually hand off the process to internal participants at all levels.

**ATTACHMENT #2
CONTRASTING APPROACHES TO PLANNING**

	Old	New
Dominant Metaphor:	Machines	Living Systems
Organizations are:	Corporations	Communities
Information is:	Reduced Processed Moved Vertically	Expanded Jointly Created Networked
We organize by:	Command / Control Powerful / Powerless	Self-organizing Shared Influence
Humans are:	Bounded Rationality	Multi-dimensional
Change is:	Incremental Top-down or Bottom-up	Spontaneous, Constant All involved
Strategy is:	Simple, Explicit	Complex, implicit
Planning is:	Top-down, strategic	Concurrent, Tactical
Diversity is:	Tolerated Accommodated	Appreciated Encouraged
Leaders / Managers:	Get in the Front Control Information Create Boundaries	Get in the Middle Create Information Remove Boundaries
Consultants are:	Experts Content-based Information Providers	Partners Experience-based Coaches

THE SUPPORT CIRCLE: A PROBLEM SOLVING NETWORK

DEVELOPED BY IVAN SCHEIER, FOUNDER OF THE CENTER FOR CREATIVE COMMUNITY, MADRID, NEW MEXICO.

PURPOSE: To systematically concentrate the total problem-solving energies of a group on one person's question/issue/challenge/problem. The image is of a magnifying glass focussing the sun's rays to start a flame.

PARTICIPANTS: 5 - 8 mature, self-disciplined, caring people.

Roles include:

The conductor or Director:

Person whose question/issue is being concentrated on. This role rotates among all participants.

Facilitator / Referee / Guardian Angel:

Monitors time and the observance of the process ground rules.

Consultants / Resource Persons:

All other participants who are bringing their unique experiences and expertise to the process.

TOPICS: Topics can be about anything clearly agreed upon by the participants, with a few guidelines:

Not too technical, esoteric, or specialized for the group, e.g. "How to improve my three-dimensional chess game".

Is ethical. "How to build a bomb in my cellar" is out, as is how to cheat more effectively in my business. Or anything in a similar vein.

Is at least potentially solvable. This includes being a reasonably manageable chunk of a larger problem. No intrinsic riddles please.

SETTING: Quiet, relaxed, casual, comfortable and if possible beautiful. Often but not necessarily always away from your usual work setting. Only equipment needed is scissors to cut the phone line. GET COMFORTABLE.

ATTACHMENT # 3A

RULES:

Absolute primary confidentiality. This means don't even tell your best friend, closest family or most intimate acquaintance, "in confidence." The only exception is when the conductor voluntarily gives you specific permission to pursue matters outside the support circle, on a carefully defined topic

Conductor must define her or his question / issue as clearly as possible. It is never-the-less recognized that the starting question may not be the final, best, or key question actually processed.

Wherever possible, initial statement and background on the conductor's question should be made available to consultants prior to the thinking session.

Every participant commits to staying in the circle until each participant's issue or question is fully addressed. Beyond ethical reasons for this is considerable support circle experience confirming that consultants learn almost as much as Conductors in the process.

PROCESS:

Each participant introduces himself / herself in terms of the experience and other resources they bring to bear on problems. This is done once before the first Conductor begins and is not repeated as the Conductor role is rotated.

Conductor states her / his issue or problem and restates it, clarifies and modifies it until Consultants agree it is clear and manageable. This is usually workable in 5 - 10 minutes. Failing this, the process hangs up until an acceptable question is formulated.

For up to 30 minutes, the conductor owns and mobilizes completely, the group's mind, will, experience, motivation, to deal with his / her issue or question. No deviation. No consultant self-reference, however subtly insinuated, is allowed by the facilitator / referee. Conductor can call "overload" or "time-out" anytime during this half-hour period. But no more than thirty minutes is allowed here.

Conductor lets input settle and sort out, comes back later for remainder of allotted hour to get group input on her / his conclusions.

Break, then repeat the cycle with each participant taking turn as the Conductor.

WARNING: This kind of day can be dangerous if you are prone to headaches. But the result rewards are worth it!

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