

Executive Retreat

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Executive Summary

On [DATE REMOVED], the State Education Association contracted with Change by Design to:

1. Conduct a pre-retreat 'System Analysis' to become aware of the challenges faced by potential retreat members in order to best design retreat activities.
2. Conduct a 2-day executive retreat to assist participants in collaboratively charting their way forward in their roles within their groups and the SEA using proven skills-based change management-related tools.
3. Prepare and deliver a post-retreat summative report.

As the result of the System Analysis, Dr. Suzanne Ebbers identified the following desired outcomes for the executive retreat:

1. Objective 1: Help participants begin to develop a shared and agreed-upon perspective on what kind of society they hope to see for 'tomorrow's children (and adults)', how education contributes to that society, and, within education, how SEA positively contributes.
2. Objective 2: Help participants begin a conversation about the purpose and contribution of SEA to public education.
3. Objective 3: Build participant ability to begin to see their individual useful contributions within SEA's efforts.
4. Objective 4: Develop personal skill in participants to be able to modify the micro-level system dynamics in their own work world.
5. Objective 5: Build in participants an understanding of the change process that augmented the understandings achieved during NTL to give participants a greater sense of efficacy to positively effect change in their own lives in some way.

Dr. Ebbers facilitated the 2-day retreat in the rural area of [LOCATION OMITTED], not far from the state capital, [CITY OMITTED], at the historic [SITE OMITTED]. There were 13 individuals in attendance, including an intern being mentored by participant [NAME OMITTED]. SEA employee [NAME OMITTED] additionally attended the first day's evening session. Although participants' prior experience with the NTL process had led them to have ultimately unmet pre-retreat expectations of the processes that would be used to move the group forward at the retreat that were largely unmet, post-workshop anecdotal feedback reports mostly high satisfaction in terms of the results accrued by participants.

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The contents of this document comprise the third contracted activity, broken down into the following sections.

1. Executive Summary: Provides an overview of contracted activities and this report.
2. Pre-Retreat Preparation Activities and Results: Provides a discussion of the information acquired through interviews and observations regarding the positives, challenges and impacting environmental elements experienced by retreat participants in their day-to-day SEA-related work activities.
3. Executive Retreat Activities and Results: Discusses facilitation efforts on a task-by-task basis and portrays participant results.
4. Post-Retreat Recommendations: Provides a rationale and list of recommended activities going forward.
5. Appendices:
 - a. Appendix 1: Blank System Analysis Interview protocol.
 - b. Appendix 2: Flowcharting of the recommended way forward to transform participant paradigms and shift efforts forward in a positive, progressive, effective manner.

Three bound copies of this report are being delivered to SEA customer [NAME OMITTED], and Dr. Ebbers is available to discuss the report with [NAME OMITTED] and any other identified individuals as requested.

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Pre-Retreat Preparation Activities and Results

Pre-Retreat System Analysis

In order to build a pre-retreat system model that would enable an effectively facilitated 2-day executive retreat, Dr. Ebbers conducted research and confidential interviews to acquire necessary information. Research included the following:

1. Review of the SEA website content to develop an understanding of SEA mission/vision/goals, structure, functionality and activities.
2. Review of NTL literature to better understand the genesis of the group's current dynamics.
3. Review of proposal for SEA Online Learning Management System Pilot effort.
4. Review of SEA e-Newsletter content.
5. Review of NTL power point summary of activity
6. Read book titled *Change: Principles of Problem Formation and Problem Resolution*¹. Based on interview feedback, it was determined that a skills-based training on effecting second order change, which was the specific focus of this book, would be useful.

Because of participant pre-retreat schedules, it was not possible to obtain all interviews in time to develop, disseminate and analyze survey information as contracted. As a result, Dr. Ebbers shifted the time to be spent on survey-related activities to the design and development of a new training intervention, which was based on the Change book listed below. This specific training occurred the evening of the first retreat day.

Confidential interviews ranged from 1.25 to 2.25 hours in length. Approximately half occurred via teleconference and half occurred in face-to-face settings in Tallahassee. All individuals were reassured repeatedly before and during the interview, as well as at the retreat, that in no way would their confidential information be revealed at any time in such a way that their personal contributions could be identified, including within the summative report. This ensured that they would have a greater sense of freedom to respond to questions in an honest way, which would enable Dr. Ebbers to better assess the real issues, concerns, positives, and hopes of retreat participants as she prepared for the retreat delivery. Individuals were interviewed on the following dates:

1. August 25 [NAME OMITTED]
2. September 1 [NAME OMITTED]
3. September 2 [NAME OMITTED]
4. September 2 [NAME OMITTED]

¹ Watzlawick, Paul, Weakland, John H., and Fisch, Richard. 1974. *Change: Principles of Problem Formation and Problem Resolution*. New York: W.W. Norton & Company

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5. September 4	[NAME OMITTED]
6. September 9	[NAME OMITTED]
7. September 11	[NAME OMITTED]
8. September 14	[NAME OMITTED]
9. September 14	[NAME OMITTED] ²
10. September 17	[NAME OMITTED]
11. September 17	[NAME OMITTED] (follow-up interview)
12. September 18	[NAME OMITTED]
13. September 18	[NAME OMITTED]

An additional confidential interview was conducted with SEA employee [NAME OMITTED] to obtain an 'outside of NTL experience' point of view of the NTL group and perspectives of SEA functionality. This interview was conducted on September 18.

A series of interview questions were generated in advance of individual interviews with the goal of obtaining the following kinds of subjective information:

- ▶ A general understanding of each individual's environmental context, including day-to-day tasks and experiences within the organization as well as their experience with SEA and beyond SEA prior to their taking their current positions.
- ▶ What works in the organization as well as in their own jobs, and to what do they attribute those results.
- ▶ What does not work in the organization as well as in their own jobs, and to what do they attribute those results.

The interview questions can be found in Appendix 1.

Additional retreat preparation included a pseudo-qualitative consolidation of the interviews along with consideration of research information to build a guiding perspective of the SEA system issues. While the interviews were fully subjective input, when the views of all were considered, certain patterns of views emerged where all or most of the interviewees held specific kinds of perspectives about the SEA internal system, positives, concerns, and challenges. Based on this consolidation of information, a set of guiding objectives was achieved which led to the design of the 2-day retreat. These focusing perspectives included:

1. Objective 1: Begin to develop an agreed-upon perspective on what kind of society participants hope to see for 'tomorrow's children (and adults)', how education contributes to that society, and, within education, how SEA positively contributes.
2. Objective 2: Begin a conversation about the purpose and contribution of SEA to public education.

² Due to illness, [NAME OMITTED] was unable to attend the [LOCATION OMITTED] retreat.

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3. Objective 3: Begin to build ability to see each individual's contributions within SEA's efforts.
4. Objective 4: Develop personal skill to modify the micro-level system dynamics in their own work world.
5. Objective 5: Develop an understanding of the change process that augmented the understandings achieved during NTL to give participants a greater sense of efficacy to positively effect change in their own lives in some way.

Total time spent in research, the development of the matrix of findings, and the design and development of a 2-hour evening training on second order change, was approximately 40 hours, as contracted. Total time involved in conducting interviews was 20 hours, which was 5 hours over the contracted time.

Semi-Qualitative Analysis of Interviews

While hard quantitative data is highly useful, often raw numbers do not tell the full picture of a system's actual dynamics. Subjective perspectives obtained through confidential interviews provide a rich mine of information from people who are directly impacted by the system, and the promise of anonymity and confidentiality in the interview process ensures that, to a much greater extent, the information provided within the interview context is much more candid and true to the individual's perspective and experience.

It is important to acknowledge that it is perceived by this researcher through this limited qualitative sample that those who are working at SEA are individuals who are highly committed to the service of teachers and ESP's in order to support public education in general and children specifically.

Nonetheless, if the perceived challenges inherent within the system, which sometimes are generated by individuals or classes of individuals, are not openly acknowledged and discussed, little headway can be achieved in solving what appear to be true systemic challenges.

In this section, a discussion of group perceptions about the SEA system is provided to help demonstrate the intentional design process of the 2-day retreat. It is important to note that there are a limitations to these findings. First, this is a very small snapshot of the organization and could not be considered a true representative sample. Second, preparation for this retreat was results-focused; thus, while effort was made to achieve a balanced perspective of positives and negatives about the organization, there was a focus on discovering the problems inherent within the system. Lastly, this methodology, as well as the retreat itself, is founded within the assumption that beliefs are the precursors of all attitudes and behaviors, which may not be the assumption or understanding of others reading this report.

The interview was structured to look at both perceived positives and negatives in the system. The positives of the SEA system will first be discussed.

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Positives

If these 13 individuals are any indication of the caliber, talent, competence, creative capacity, intelligence, passion, giftedness, thoughtfulness and big heartedness that exist within SEA, then this organization truly has the potential to change the world. SEA employees appear to be passionate about teachers and ESP's do their jobs with the support and resources required. They work hard to build relationships with locals, to positively impact their efforts to support public education, and to help impact and change the world in a positive way. They also highly value these relationships, as they are perceived as having broadened their life perspectives. SEA employees are highly motivated to help individual members at the local level, even more given that everyone right now is struggling so much due to the country's economic situation, and many in the field are fearful of losing their jobs due to economic cutbacks.

Based on this small sample, one could extrapolate that the people who work for and on behalf of SEA are highly committed, competent professionals who work tirelessly on behalf of the members they serve. Within their departments, many of these individuals love what they do, and they highly value who they work with. Staff members are perceived as highly supportive and helpful in regards to each other and in many pockets of the organization they communicate very well with each other. Despite the numerous systemic roadblocks employees often report facing from within SEA and within [STATE OMITTED] education, SEA employees suit up and show up every day, working passionately and tirelessly on behalf of those they serve. They are proud to be able to advocate for a greater cause such as educating our children.

Challenges

It is important to reiterate that the information in this section was based on 13 interviews (and a quasi-qualitative analysis) and cannot be fully construed as a true representative sample of the general view of SEA employees. However, if the insights provided in these interviews are any indication, then SEA is facing very large and debilitating challenges, possibly to its own existence. In this next section, a discussion of the perceived challenges within SEA is provided.

SEA appears to largely be a fear-based and distrustful institution. This fear appears to derive from a number of what are believed to be largely organizationally-supported behaviors:

- ▶ There is a wide gap in trust between leadership and staff.
- ▶ Blindsiding occurs frequently.
- ▶ There is a high amount of distrust in that intra-organizationally most people tend to feel like they have to watch their backs as no one else will.
- ▶ Employees tend to not feel valued – that 'human connection' in terms of a culture of appreciation and teamwork is lacking.
- ▶ Staff are not always trusted to do their jobs.

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It also appears that the organization projects an attitude that ‘we know we are right’, which can either be true or be a symbol of a defensive stance used to distance the organization from the underlying self-perception of organizational inadequacy. This perceived mostly system-wide perception leads to a great deal of anxiousness and stress. The fear additionally appears to extend to locals and the membership itself, somewhat due to the current economic situation.

Systemically, there is a sense that what the SEA employee says in terms of constructive criticism doesn’t impact the bottom line to any great extent, as long as the organization ‘looks good’. In fact, if an individual challenges the system or has a different perspective, there appears to be a tendency towards an almost inevitable retaliation in some form. Assumptions and resulting conclusions frequently appear to be made by individuals within the organization without checking those assumptions out with the individuals involved to determine if their perceptions about motives and behaviors are correct. Shaming and blaming appear to be the more operant *systemic* behaviors rather than taking personal responsibility. This could be due to the nature of SEA membership – when an oppressed individual comes to power, often s/he becomes an oppressor. SEA is comprised mostly of teachers who come from a very hierarchical education system and have not necessarily been well-treated – yet they do have and can exercise personal power within their classrooms. It would make sense, but is just speculation, that that mental model of how to behave administratively would be applied to a new working situation within SEA, leading to a heavy handedness in terms of dealing with others within the organization.

In addition, internal politics are largely seen to be fairly divisive, negative, and lacking fairness for all, which appears to have a large impact not only on SEA’s functionality but on individuals in terms of their physical and emotional health. Employees are in a great deal of emotional pain due to a sense of lack of direction; they are exhausted and, for the most part, they highly stressed on a fairly continuous basis. Overall, morale is fairly low, and some debilitating health-related issues are perceived to be found throughout the organization, appearing to have been largely brought on by the system itself. While there are vastly high, and unpredictable expectations placed on a good number of SEA employees, there are also low expectations exerted *systemically* in terms of reciprocally respectful behavior.

The system seems to be most concerned with membership acquisition and retention, and there is a strong perception that SEA *as a system* does not support much in the way of services beyond litigation and lobbying. This does not mean that a good deal of outstanding and meaningful membership work is not being done beyond these two areas within SEA, but rather that the system does not value that work. ‘Turf’, ‘power’, ‘status quo’, ‘rigid’, and ‘fragmented’ are words that describe SEA as an organization – beyond being political as an advocate for members, it appears that in general there is a systemic lack of spontaneous advocacy for anyone other than oneself.

‘Reactivity rather than proactivity’ is an often used description of the overall underlying organizational dynamic, with a few explanations for this. First, the observation seems to largely be that people are so busy running around to get their jobs done that the organizational structure doesn’t allow people to stop and figure out what truly should be done and how to best do it. Second, SEA is a political organization which runs counter to collaboration and problem-solving; because those who are attracted to union work tend to be more structure oriented ‘fix it’ people, ‘process’ is not highly valued. Third, there is a lot of pressure to get and keep membership, such that appearances of inadequacy are systemically feared: “if we lose members, I’ll lose my job’. That is a powerful motivator to sustain appearances.

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There appears to be a great deal of questioning about whether or not the current vision, mission and goals are really understood in light of their own individual effortful contributions - e.g., 'does what I do really contribute to the vision, mission and goals?' The perspective seems to be that employees are so busy running around, doing their jobs, that there is no time to stop and determine if what they're doing really is useful in the current educational system. Further, there are questions about where the organization is really going – where education is going – and ruminations as to whether or not SEA has a voice in the current discussion about education. Presently, they seem to understand the current big picture, but don't have a sense of how to get there.

Structurally, the organization appears to contribute to systemic stress. Expectations overall do not appear to be very clear, and there is no reported formal evaluation system in place to give employees some sense of their contributions to the organization. There also appears to be a system-wide tendency toward capriciousness, a capriciousness that appears to be more rooted in political gain (for the organization or the individual(s)) than for actual useful results that positively contribute towards sustaining SEA's mission and goals. Often an initiative catches individuals by surprise, leading them to have to drop their full-time efforts for SEA's 'agenda of the moment'. Systemically, however, teamwork doesn't appear to be a supported behavior, leading to a frantic reactionary behavior on the part of management to whatever the current crisis might be and pulling individuals off of current assignments to handle the crisis of the moment.

Tied to this is a frequently-made observation that the SEA is not truly a learning organization. Indeed, there appears to be more of a 'telling' approach to working and learning within the organization than a 'working with/collaborative' approach – a kind of rigid "We know what we're doing, and we're right" stance. Because of what appears to be a continuously chaotic work experience, it further appears that systemically no one believes there is time to debrief from activities, to learn from them, to become a smarter, more effective organization. *Blame* was mentioned before as a perceived systemically supported behavior, and this appears to be more of the predominant debriefing activity than in identifying problems, solving them and learning from them. Again, this is a perception about SEA as a system, not necessarily about specific individuals.

Leadership is respected but not highly viewed as providing strong direction. In fact, in some ways leadership appears to be more intent on reacting, saving face and staying in power than on working together in a results-driven manner. It is not believed that this is necessarily any one individual's fault; rather, the system seems to perpetuate what appear to sometimes be politically-motivated agendas. Leadership is not viewed as trustworthy, and many do not feel valued by leadership. This appears to extend down into the locals as well. In fact, there is a perception of a wide disconnect between the work of SEA and the needs of locals as well as the needs of public education. There does not appear to be a demonstrated support for teamwork, even at the top levels; in fact, there appears to be a great deal of micro-managing occurring, which tends to disperse personal initiative.

SEA does not appear to be a results-driven organization beyond perpetuating its established processes; further, however, SEA appears to be rudderless, unknowing about its trajectory in terms of desired public education-related results. Employees see themselves as being non-valued and batted about by forces within SEA to the extent that they don't have a clear sense of whether or not they are adding any value to the expressed vision of SEA. They do not see how their individual effort contributes to the SEA vision and mission goals.

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Preparation for Retreat: Coalescence of Findings to Generate a Way Forward

One of the challenges in terms of preparation for the group was the diversity in terms of SEA departmental representation as well as overlaps of group affiliations within SEA. All participants, save one, were part of the NTL process, such that they shared that frame of reference and experience. Six of the participants were additionally affiliates of the Professional Development group. In fact, the entire current PD group was in attendance. The other six participants represented a variety of other departments and perspectives: representation came from field staff (1 individual plus intern), OD within OFS (2 individuals), OFS (2 individuals, one of whom was unable to attend due to illness), and Communication (1 individual).

The facilitator for this retreat is not an NTL provider, yet it was important to become familiar with what the NTL experience provided. Further, while NTL is a highly useful and effective process to build a cohesive organization, it is a process, while the effort inherent in this retreat was focused towards providing a results-oriented experience. Additionally, due to the fact that participants at this retreat came from so many diverse perspectives within the SEA organization, it was important to focus the retreat in a way to build commonalities beyond individual group representations through the development of a shared mental model. Further, the facilitator understood that no big changes could occur in a two-day span of time, although changes in beliefs could indeed be achieved during that time leading to potential shifts in behavior that in turn could at least impact participants' work-related 'forcefields'. Lastly, it was an important requirement that participants walk away with useful information that could be applied personally and professionally.

Thus, the criteria used to build the retreat agenda included the following:

1. Objective 1: Begin to develop an agreed-upon perspective on what kind of society participants hope to see for 'tomorrow's children (and adults)', how education contributes to that society, and, within education, how SEA positively contributes.
2. Objective 2: Begin a conversation about the purpose and contribution of SEA to public education.
3. Objective 3: Begin to build ability to see each individual's contributions within SEA's efforts.
4. Objective 4: Develop personal skill to modify the micro-level system dynamics in their own work world.
5. Objective 5: Develop an understanding of the change process that augmented the understandings achieved during NTL to give participants a greater sense of efficacy to positively effect change in their own lives in some way.

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Based on these criteria, the retreat agenda was planned to build the following behavioral outcomes for participants:

1. Generate a shared 'Ideal Vision' of the kind of world they'd like to see for tomorrow's child and adult.
2. Generate a shared vision of Education's ideal contribution to that Ideal Vision.
3. Generate a shared perspective of SEA's contributions and non-contributions to Education's ideal contribution.
4. Identify a problem within SEA that tags to a deficiency in Education's contributions, and concurrently work to solve this problem.
 - a. Build a new model of how to problem-solve while building a common perspective on how to move forward to ameliorate an SEA problem.
5. Build a paradigm regarding identification of First and Second Order Change efforts and demonstrate skill in being able to specifically address 'power struggle' kinds of situations.
6. Build a different shared mental model on change drawing from the following research literatures: clinical psychology, social psychology, health psychology, goal setting, educational psychology, and marriage and family therapy.

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2-Day Executive Retreat at [LOCATION OMITTED] September 24-25, 2009

Within this section, an overview of the activities, the underlying rationales for each of them, how the retreat unfolded over the two days, and a running commentary are provided.

Overview of Activities and Underlying Rationale

The Day 1 sessions occurred from 9AM to 12 noon and 1PM to 4:30PM. There was a 2.5-hour break for a boat ride on the [LOCATION OMITTED] and dinner on the first day, followed by one evening session from 7:30-9:15PM the first evening. The Day 2 sessions occurred from 8AM-12:15PM and from 1:45-4PM, followed by a debriefing session with Professional Development Director [NAME OMITTED].

The focusing frameworks of the training included three adjoining learning activities:

1. Strategically Thinking Outside the Box: This is a 1-2 day training on problem-solving rooted in a strategic thinking model that involves first looking at systems in terms of their current and desired results, and then solving the 'in-between' *gap in results* through a root cause analysis, identification of forward-moving objectives, a SWOT analysis of those/that objective(s), generation of essential solution criteria, and building of a solution. This problem-solving process training builds innovative capability in a fun, interactive manner using everyday stories and conspicuously not including strategic planning verbiage. Through the training, learners build an understanding of how to accomplish this innovation within Dr. Roger Kaufman's sustainable strategic thinking framework, MegaPlanning³.
2. Outside the Box Change: This was a 2-hour training on how to 1) identify the two characteristic of a system (change and persistence), 2) view a change as far as first or second order change behavior, 3) how to address a persisting system problem to achieve second order, rather than first order, change. This activity was based on the MFT book *Change: Principles of Problem Formation and Problem Resolution*⁴.
3. Leveraging Change Principles to Succeed: This was a 2.5 hour informational/discussion-driven training that draws from a variety of research-based literatures within psychology, marriage and family therapy and education. One book from which some of this information could be found was recommended for reading⁵.

³ Kaufman, R. (2000). *Mega Planning: Practical Tools for Organizational Success*. Thousand Oaks: Sage Publications, Inc.

⁴ Watzlawick, Paul, Weakland, John H, and Fisch, Richard. 1974. *Change: Principles of Problem Formation and Problem Resolution*. New York: W. W. Norton and Company.

⁵ DiClemente, Carlo C. Prochaska, James O., and Norcross, John C. 1995. *Changing for Good*. Avon Books.

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Retreat Delivery and Results

This section provides a discussion of all facilitated retreat activities and the results participants themselves generated.

Day 1 – Task 1

The morning of Day 1 of the retreat was largely spent in helping participants begin to build a shared mental model of SEA's contributions to positive societal outcomes. As the result, it was important to first identify desired societal outcomes in terms of 'The kind of world they would want for tomorrow's child (and adult)'. This was a full group discussion, and comprised the following participant-generated criteria for that 'Ideal Vision':

- ▶ Happy
- ▶ Healthy
- ▶ Productive
- ▶ Safe-Physically
- ▶ No War
- ▶ No Fear
- ▶ Non-Violent
- ▶ Earth Conscious
- ▶ Creative
- ▶ Embrace Diversity
- ▶ Forgiveness
- ▶ Civility
- ▶ Honoring perspectives
- ▶ More than one right answer
- ▶ Respect
- ▶ Play
- ▶ No poverty
- ▶ Safe technology
- ▶ End to human trafficking
- ▶ Sustainable world
- ▶ Not craving externals
- ▶ World of possibilities
- ▶ Value system – sense of responsibility
- ▶ Revised definition of success
- ▶ Connections with others
- ▶ Automated cars – safety
- ▶ Norm in society – look for solutions
- ▶ Accountability – learn from and own mistakes
- ▶ Love – No judgments on who you love
- ▶ Less stress and urgency – slower, simpler
- ▶ Personable – relationships, connections
- ▶ Sufficient Challenges and Opportunities to Grow to be happy, healthy and productive.
- ▶ Mental/physical health AND having time to decompress
- ▶ Freedom – to be one's own person and have one's own beliefs
- ▶ When we decrease space between individuals – we diminish the power divide – people therefore don't feel lower than.

After the group had generated this list, the facilitator provided an additional rubric which has been found to largely reflect these items within the Ideal Vision: $C \leq P$ (Consumption is less than or equal to Production). Once the group had generated this list, the facilitator invited participants to review the end page of the Strategically Thinking Outside the Box training, which listed for them Roger Kaufman's MegaPlanning Ideal Vision. They agreed that, with a minor modification, the Kaufman's Ideal Vision reflected their conclusions as well.

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Day 1 - Task 2

The group's next activity consisted of identifying the contributing factors to the Ideal Vision. Their list included:

- ▶ Education
- ▶ Financial/Banking
- ▶ Healthcare
- ▶ Special Interest Groups
- ▶ Family
- ▶ Government (local, state, national, world)
- ▶ Workforce (Corporations, non-profits, private for profit)
- ▶ Charitable/Faith/Green jobs
- ▶ Unions and/or Advocates
- ▶ Communities

Day 1 – Task 3

Participants then examined **Education**, and worked to identify the desired results that combined would achieve in Education its contribution to the Ideal Vision. In other words, they identified eight different areas that combined would be Education's contribution to the achievement of the Ideal Vision. See Table 1 below and column labeled 'Desired Education Outcomes (Participant Generated)' along with a description of each in column 2 titled 'Descriptions'⁶ for the information generated by participants during this task.

⁶ Post-retreat, Dr. Ebberts consolidated columns one and two into a comprehensive descriptive results-based statement for each of the eight categories. This is what is found in the third column of the table immediately above that is titled "Desired Education Results (Post-Retreat Facilitator-Generated). These serve as the basis for the Macro-Level results found in the flowcharting within Appendix 2.

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Table 1: Desired Education Outcomes & Descriptions Consolidated

Desired Education Outcomes (Participant Generated)	Descriptions of Desired Education Outcomes	Desired Education Results (Post-Retreat Facilitator-Generated)
Dynamic system flexibility based on non-factory model	Quality staff	(This describes a system issue, but it is not included as a Desired Education Result and in Appendix 2 due to the fact that it would be a generated item <u>later</u> in the discussion, during a SWOT analysis.)
	Quality resources	
	Quality leadership	
Equalize the playing field	Access is equal for all	Playing field, to include 1) access; 2) individualized, specialized and flexible services; and 3) high expectations across cultures, races, gender and other factors, is and remains equalized.
	Provided services are individualized, specialized and flexible	
	Expectations are high and individualized	
Education acts in partnership	Open-mindedness towards parental and community impact – must address security, time and legal ramifications	Honest, reciprocal, inclusive, flexible, respectful, open-minded conversational partnerships, that address security, time and legal ramifications among education-related individuals, families and communities, occur on a regular and ongoing basis.
	Reciprocity and respect – honest, inclusive conversation	
Foster understanding of world connectedness	Positive attitudes and appreciation for diversity of perspectives, lifestyles, cultures and people	World connectedness and interdependence, to include understanding, appreciation, and positive attitudes towards diversity of perspectives, lifestyles, cultures and people as well as willingness to serve others, is exhibited on an ongoing basis.
	Build understanding and appreciation of global interdependence	
	Provides service learning opportunities	
Skilled workforce	Critical thinking	A skilled workforce, in which there is universal high mastery of critical thinking, teamwork and collaboration, foreign languages, math, language, science and technology, as well as a desire and capability to engage in lifelong learning, occurs on a consistent and ongoing basis.
	Teamwork, collaboration	
	Educators model these behaviors	
	Foreign languages learned early	
	Lifelong learning	

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Table 1: Desired Education Outcomes & Descriptions Consolidated (continued)

Foster individual well-being	Healthy food	High positive individual well-being, as evidenced in healthy lifestyle conduct, healthy social conduct, and engagement in multiple ongoing and varied life experiences, is exhibited on a consistent, ongoing basis.
	Social literacy	
	Physical activity	
	Supportive infrastructure	
	Positive attitudes towards all work skill sets	
	Physical activity	
	Provision of tools and relevant, challenging curriculum	
	Accommodates biorhythms	
	Mind-body connection	
	Receive good diagnostic and preventive healthcare	
Provide multiple varied life and curricular experiences		
Produce good citizens	Foster respect for life and differences	Good citizenship, as evidenced by socially responsible behavior, respectful behavior towards all life, self-determined behavior and active participation in local, state, regional, country and world affairs, is demonstrated by each individual on a consistent, ongoing basis.
	Foster social responsibility	
	Build self-efficacy	
	Foster self-determination	
	Knowledge of local, country, world cultures and history – foster connections of action and sequences.	
Foster appreciation, understanding and skills in all arts, to include: Music, Dance, , Literature, Mechanics, Design, Art, Theater		Individuals will demonstrate appreciation, understanding and skill in all arts, to include Music, Dance, Literature, Mechanics, Design, Art, and Theater

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Day 1 – Task 4

In the afternoon of Day 1, and in the interest of time, the group then focused more closely on only one of the desired Education outcomes, which was the generation of a ‘Skilled Workforce’. The group worked to identify the ways that SEA did and did not contribute to that skilled workforce and generated the following table of items:

How SEA is Contributing	How SEA is Not Contributing
Scholarships for member kids	Lack of networking with other organizations and not fully understanding the ‘opposition’
PPA – knowledgeable, trustworthy, advocate for money	Lack of good comparative marketing of services, such as PD
Workforce development fund	Insufficient internal communication leads to lack of or fragmented services
ERD/MSP	Disconnect/insufficient modeling of teamwork, collaboration and communication
NEA/AFT Educational Innovation Grants for school redesign	Inability to lobby successfully for all pro-education legislation
Personal development for members and leaders	Insufficient extra-organizational marketing
Provide conferences to lifelong learners	
Recruit people	
MOSAP Campaign	

It was at this point that the group hit a figurative ‘wall’, as they found they could not identify very significant and strong ways that SEA directly impacted education in terms of the development of a skilled workforce. They found it highly frustrating and discouraging to be unable to generate a good list of significant positive SEA contributions, but rather found SEA lacking in terms of contributing directly to a skilled workforce. In fact, this realization so debilitated the group energy that it was necessary to redirect their attention towards a different previously planned activity a bit earlier than expected. Dr. Ebbers worked with participants for the last 45 minutes of the afternoon session on the beginning of the ‘Strategically Thinking Outside the Box’ training, and between that redirection and the evening session, the group energy rose.

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It's important to note however, that although this was one outcome of the 2-day retreat that was unintended, post-retreat feedback indicates that it was a very useful component of the work and has led to significant discussions on SEA's role in Education – which *was* an intended retreat outcome.

NOTE: Only after the retreat, in reflection, did the facilitator realize she had contributed to an extent to the energy deflation by, in her planning, making the assumption that SEA was a direct contributor to Education, rather than largely a contributor of other factors (such as teachers and educational support staff) that contributed to Education. As a result, Dr. Ebbers decided for this report to generate a flowcharted 'way forward', should SEA wish to further address the very real problems it faces. The package of flowcharted examples in Appendix 2 provides an insider's viewpoint of the thought process involved in following this approach to its more correct conclusion, a process that would serve as the 'next step' set of problem-solving activities to help SEA chart its way forward. It appears complex, as most flowcharted activities do. Be assured it is only a snapshot of the thought process involved, rather than how the activities will appear to participants of this activity. We find it important to clients considering such services to get a 'glimpse' of the underlying processes behind the word we do.

This Appendix 2 workbook includes the information generated by participants, but in a more consolidated format and in 'results-driven' language. Thus, referring back to Table 1 in this report above, Dr. Ebbers merged the original desired Education Outcomes, as well as their descriptions, and generated a new table of 'Desired Education Results' (see column 3), and in the new flowcharting of Appendix 2 entered them as the eight Macro-Level Results to be broken down in subsequent pages into Micro-Level Results (contributing factors) and their Activities (Processes) and Resources (Inputs), which are considered a second level of contributing factors. Explanations are provided on each page to help clients understand the process, should they wish to.

Day 1 – Task 5

After a break for a boat ride on the [LOCATION OMITTED] and dinner, participants convened for the evening information and training session on how to positively effect second order interactional change, rather than persist in a fruitless perseverating interaction that resides in first order change. Participants were given instruction in identifying first and second order change, understanding how to identify no-win interactional situations, and how to reframe those interactions in order to transform fruitless interactions into win-win solutions. This break in the day's activities was intentionally pre-designed to redirect participants away from the day's focus and efforts and to concurrently give them skill in adopting positive ways to ameliorate formerly challenging workplace interactions.

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Day 2 – Task 1

The morning began at approximately 8AM, and Dr. Ebbers led participants through the balance of the “Strategically Thinking Outside the Box” training. Within the workshop, many opportunities to practice the concepts were provided, including a self-selected group choice in order for the activity to be even more personally relevant to them. Participants chose the relatively small and relevant problem they had begun to tackle the previous afternoon, which was the ‘Generation of a Skilled Workforce’.

During this session, after participants identified the current state of skilled workforce, they generated a number of contributing factors for the problem. These included:

- ▶ Insufficiently-shared definition and understanding of excellence.
- ▶ Low Expectations of kids, adults and curriculum of self and others
- ▶ Protection – status quo of what is
- ▶ Children are not considered a priority
- ▶ Attach/blame mentality by union and system
- ▶ Narrow curriculum
- ▶ Stereotyping homogeneous grouping, racism, classism
- ▶ Excuses
- ▶ Justifications
- ▶ Blaming
- ▶ Professional jealousy
- ▶ Family dynamics and values
- ▶ System non-child oriented
- ▶ Status quo persists
- ▶ Resistance to change (FEAR)
- ▶ Fear of losing what we have
- ▶ System has penalized those who march to different drummers
- ▶ Fear of being shown to be wrong – self-exposure
- ▶ Not addressing differences among people
- ▶ System complex
- ▶ Children not considered a priority
- ▶ Don’t listen to those closest to the situation
- ▶ Shortsightedness
- ▶ No power – no vote
- ▶ Selfishness
- ▶ Powerful SIGS
- ▶ Low expectations
- ▶ Provide appropriate rigor-curriculum responsible–
- ▶ transform
- ▶ Multi-modal learning opportunities
- ▶ Transition people – resisters – and provide a transition period – create safety structure.
- ▶ Include choice, incentives and opportunities to not engage until they’re ready - grandfathering

After this brainstorming process, where contributing factors were identified at this and a subsequent linked level of detail for a few of these first level of contributing factors, participants then determined, for the sake of this exercise, that they intended to close the gap between the current state of ‘having a less-than-desired level of skilled workforce in this country’ to achieving the desired level of a fully skilled workforce, and discussed in a mini-SWOT analysis the advantages and disadvantages of achieving this objective.

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Once they had completed the SWOT analysis, they were invited to generate Essential Solution Criteria, which are those criteria which must be incorporated into the solution for it to be effective in solving the problem. The Essential Solution Criteria that participants generated included:

- ▶ Address resistance of status quo
- ▶ Provide rewards/grants for pilots and innovation
- ▶ Address outside forces
- ▶ Include top of chain for buy-in
- ▶ Provide transitional period to reduce professional barriers and resistance
- ▶ Stakeholder involvement
- ▶ Ensure operation is from the same data sources and information and not manipulated
- ▶ Acknowledge this is a tough conversation to have.

They completed this activity at approximately 12:30 by combining these criteria into a workable solution. Due to time constraints, they were unable to then generate action plans to see how the process would then move forward. Upon conclusion of the morning effort, as a group we debriefed, so that those who would not return to the evening session would experience closure. We then broke for lunch.

Day 2 – Task 2

To complete the workshop, Dr. Ebbers presented to those participants remaining (primarily those in the Professional Development area) a two hour interactive session on research-based change principles designed to transform remaining participants' paradigms of the change process. The day ended at approximately 4PM.

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Recommendations

Moving a group of 13 very intelligent, curious, insightful, skilled and strong-minded educators, who are ardent supporters of education, forward to do work they did not expect to do was probably one of the most challenging audiences one as a trainer and facilitator could face. Yet indications are that the effort has borne the desired fruit, at least in part. Nonetheless this effort and the ensuing results are only a beginning.

The State Education Association has clearly written vision, mission and goals, and a review of the goals indicates that these are process-related rather than results-driven. Additionally, based on the input of these 13 individuals, it is not clear that many the eight strategic goals as listed are actually being achieved to any significant degree. Yet it is unquestionable that each and every individual who attended the retreat passionately wants to contribute to making public education the best it can be. In the least, it appears based on the information acquired and the retreat results that there is a 'disconnect' between what these SEA employees do on a daily basis and their sense of their impact on SEA's stated goals.

If this is the case for 13, it is expected that perhaps this could be the case for the entire organization. Indeed, if the overall input of 13 individuals as an indication, it is perceived that the State Education Association is facing challenges that might well lead to its becoming irrelevant to Education in this state.

To address these concerns, the following approach is suggested to occur throughout SEA with all members:

1. Develop a shared mental model of an ideal vision.
2. Identify the numerous contributors to that ideal vision, including education.
3. Determine the specific contributing factors to education that combined contribute to the ideal vision.
4. Determine within each of those specific contributing factors all of the underlying contributing factors, or Micro-Level results, that combine achieve each of the next level up of results.
5. For each of these bottom line, or Micro-Level results, determine the Activities (Processes) and Resources (Inputs) that feed into each of these.

Through this system scoping effort, SEA members and leaders can then be led to determine what they wish to accomplish within that system, determine how they are currently contributing, and how, in a data-driven way, they can then transform SEA into the organization that will indeed close the Gap in Results between the current state of SEA's contribution and its desired state.

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To achieve such an outcome, that could therefore transform the organization and its perceived and actual relevance in public education today, would require a strategic approach. *Without understanding the why and the how behind the what*, without achieving a transformed shared mental model, and without including all membership (not just delegates) in this collective effort to build a sustainable, results-driven, relevant organization that does indeed engage in the eight stated goals of the State Education Association, the effort is doomed to failure and unworthy of the money, time and effort required to engage in this endeavor. This recommendation is possible, it is do-able, and it is attainable if leadership and other relevant stakeholders are willing to invest in this process. Dr. Ebbers and her Change by Design team are available to further discuss these recommendations.

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APPENDIX 1: INTERVIEW PROTOCOL

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Interview Template

Interviewee:

Date:

Time:

Location:

1. What is your position title? Who is your supervisor, and how do you fit in with the group that is going on the retreat? Please describe the main tasks you perform.
2. Please describe your journey to how you came to work at SEA.
3. Please describe a typical day at SEA.
4. Can you describe your experience with the NTL program? What did you like about it? Didn't like about it? What has changed in the group's overall and day-to-day interactions as the result of NTL.
5. Name three things that make you passionate about working for SEA.
6. Name three things that make you passionate about doing your job.
7. Name three things that you dislike about SEA.
8. Name three things that you dislike about your job.
9. If five things were to remain the same at SEA and you got rid of all the bad stuff, what would those five remaining things be?
10. If five things were to remain the same at SEA and you got rid of all the good stuff, what would those five remaining things be?
11. For me to absolutely love working at SEA and for SEA to be highly effective, things would have to change in the following five ways:
12. For me to absolutely love working in my department with my co-workers, things would have to change in the following five ways:
13. Give me 5 descriptive words that sum up working at SEA.

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14. I'm going to give you some words, and I'd like your reaction to them in relationship to your work at SEA.

- ▶ Trust
- ▶ Mission
- ▶ Working together
- ▶ Disorganization
- ▶ Teamwork
- ▶ Stress
- ▶ Thoughtfulness
- ▶ Consideration
- ▶ Distrustful
- ▶ Forgiveness
- ▶ Vision
- ▶ Blame
- ▶ Tired

10. What keeps SEA from being the best place in the world to work at?

11. Are things fearful at SEA? Why do you say that?

12. Do folks at SEA and in your group work as a team? Why do you say that?

13. Scale of 1-5: How high is morale at SEA? What contributes to the state of morale in SEA? List as many factors as possible.

14. Scale of 1-5: How motivated are you to do an excellent job here? What contributes positively and negatively to that level of motivation?

15. What works in your particular department and why?

16. What doesn't work in your particular department and why?

17. If I make a mistake 'X' happens. Please describe in detail.

18. What role does politics play in your work? Please describe in detail.

19. Are you happy with your level of compensation? Why?

20. Do you do your best every day – and if not, what keeps you from doing your best?

21. Is the group you work with meeting the mission of SEA? Why?

22. The problem with SEA is _____

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23. The problem with my group is _____

24. What is the organizational structure in the area that you work?

25. Is trust an issue at SEA? In your group? Please explain your response...what contributes to this?

26. What are you passionate about in terms of your job?

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APPENDIX 2: FLOWCHARTING THE WAY FORWARD