# CCC Change Leadership Summit Training Materials

OCTOBER 5-6, 2017

IRVINE, CA

# Change Leadership Summit
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# Welcome to the Change Leadership Summit!

**This Is Not an Ordinary Conference:** We have designed a program that will begin the development of our shared capacity for change leadership in real time. Together we will examine multiple perspectives, hear our varied voices, and consider systemic challenges as we develop new approaches to engaging others in these same conversations.

This is a time of momentous opportunity and change for California Community Colleges. We have unprecedented funding available to support our institutions and the unique role we play in California's economic and social welfare. As a dedicated workforce of education and public service professionals, we believe that we have both the experience and the knowledge to effectively address intractable equity and student achievement gaps that are an ongoing part of our system.

Our focus on equity and achievement has always been central to our mission and the commitment we bring to our students. We certainly have made gains. We have discovered and shared our strategies for student success. Programmatic responses are bound to continue to address the challenges we face. Using CCC Guided Pathways and a framework for change leadership, integration of categorical funding plans that reduce redundancy and increase coordination, continued research and identification of best practices in student success, and varied college and district level approaches, will certainly continue to heighten our collective success.

And yet, the energy and commitment we demonstrate do not consistently result in the transformation of educational outcomes we desire. Our leadership perspectives and strategies are an integral part of shared capacity to deliver on the promises of these initiatives. As a team of leaders and leadership development providers from across the CCC and the Chancellor's Office, we have examined ways to increase our change leadership effectiveness. System Leadership provides us frameworks and tools for uncovering and discussing systemic contributions to student equity and achievement.

We are glad that you have joined us. We look forward to learning together over the next two days!

## Change Leadership Advisory Committee

*Listed with leadership development affiliation*

Laura Hope, CCCCO & CLAC Chair
Loretta Adrian, CEOs
Susan Bray, ACCCA
Julie Bruno, ASCCC
Susanna Cooper, Wheelhouse (UC Davis)
Angélica Garcia, CSSOs & LLN
Tracie Green, ACHRO
Deborah Harrington, 3CSN
Mike Howe, RP Group
Krista Johns, Vice Chancellors
Irene Malmgren, CIOs
Carmen Sandoval, CCLC
Jeff Spano, IEPI
Theresa Tena, IEPI
Scott Thayer, A2MEND
Shondra West, 4CS
Audrey Yamagata-Noji, APAHE

# CCC Change Leadership Summit
# Fall 2017

***enlighten   empower   engage***

## Conference Objectives:

1. Develop approaches, mindsets and tools that enhance local leadership efforts.
2. Assess challenges and opportunities for collective leadership within and across our institutions.
3. Identify and explore the leadership demands for undertaking whole systems change to further close achievement and equity gaps.

## Using this Program:

System leadership is an emerging leadership framework that is successfully being used in multiple sectors to address intractable and complex social issues; it is inherently collective and it requires us to *see* our realities in new ways. Each presenter will include new ways to understand leadership generally, and system leadership specifically. We call those sections of the agenda *Change Leadership Mindset.* Presenters will also include tips and tools to engage in system leadership and uncover a new, collective understanding of the challenges we face. We call these components of the agenda *Change Leadership Toolkit.*

This program is designed as a reflective and interactive learning tool. In it, you will find notes pages dedicated to each *Mindset* and *Toolkit*. These pages include a brief description of the content and space to record key concepts, your thoughts, and consider what you plan to take back to your workplace. In addition, you will find cheat sheets for change leadership tools so you can use them in your collective leadership endeavors.

Finally, you will find a place to note contact information as you meet new CCC leaders you want to add to your network. Development of new, broader perspectives is a requirement for learning about and engaging in system leadership; we can't do it alone.

If you would like copies of presenter slides, they will be posted on IEPI website following the Summit's completion. Go to: [http://bit.ly/IEPIProDev](http://bit.ly/IEPIProDev)

# Change Leadership Summit Agenda

****Please note Friday start time change.*****

Thursday: 10/5

Registration: 11-12 noon

Lunch buffet: Noon – 1pm

I. Summit Welcome and Opening Comments 1:00

- Laura Hope, Executive Vice Chancellor of Educational Services; Change Leadership Advisory Committee Chair (CLAC)
- Theresa Tena, Vice Chancellor of Institutional Effectiveness; CLAC member

II. Change Leadership and the CCC Vison for Success: 2:00
Chancellor Eloy Ortiz Oakley

- Change leadership in context of Vision for Success
- Hopes and expectations for CCCCO and the field
- Reflection on personal lessons learned
- Question/answer; reflections; table discussion

*Break (3:00-3:15)*

III. Collective Reflection on Change Leadership: 3:15
What We Know About What It Takes

- **Change Leadership Mindset: Appreciative Inquiry (AI)**
  - What is AI?: Beginning to see systems
  - Focal Question: What we know about Change Leadership (CL) and conditions that support sustained organizational shifts?
  - Collective themes identified for use at all CCC levels including guiding further CL Development convenings and local CL efforts
- **Change Leadership Toolkit:**
  - Cheat sheet for AI conversation replication
  - Discussion themes can be used for project work, for local leadership development and change project planning

IV. Change Leadership Paradigms: Relevant Mindsets and Practices 4:30

- **Change Leadership Mindset: Overarching Trends in Leadership and Leadership Development**
  - Presentation of leadership and transformational learning theories and practices that can assist college-level teams identify relevant approaches for their change project.

V. Closing comments and No-Host Bar Reception 5:00

- Mingle, network, and continue the conversation at a reception for all Summit participants.

## Friday: 10/6

## Breakfast buffet will be available at 7:30 am

I. Opening Comments/Welcome Back 8:00

- Laura Hope, Executive Vice Chancellor of Educational Services and CLAC Chair
- Irene Malmgren, CIO and CLAC Member
- Scott Thayer, A2MEND, VP Student Services and CLAC Member

II. Keynote Presentation: System Leadership 8:15

**John Kania, FSG Consultants**

- **Change Leadership Mindset: Introduction to System Leadership**
  - Collective leadership for social change
  - Engaging the whole system: working across organizational and industry boundaries
  - Core capabilities, gateways to system thinking, tools, stories, and tips
  - Interactive discussions: Individual and team reflections
- **Change Leadership Toolkit:** Cheat sheets for Mental Models, Ecocycle and TRIZ activities for helping teams to see systems

## Break and Lunch (11:15-12:15)

III. Collective Perspective Taking 12:15

- Angélica Garcia, CSSO, LLN and CLAC Member
- Live CLAC member discussion
- **Change Leadership Mindset**: Collective listening, speaking, and increasing team capacity to see the larger system's contribution of current outcomes
  - Team practice and reflection
- **Change Leadership Toolkit:** Cheat sheet for Collective Perspective Taking exercise

IV. Shared Learning and What's Next 2:00-2:30

- Harvesting Our Learnings
- What Comes Next for CCC Convenings and Leadership Development
- Closing Remarks

# Change Leadership and the CCC Vision for Success:

## Chancellor Eloy Ortiz Oakley

*Chancellor Oakley will discuss the CCC Vision for Success as a context for our shared work as change leaders. He will articulate his expectations for the Chancellor's Office and hopes for the field as they work together to further close achievement and equity gaps in California. Chancellor Oakley will share his personal insights and experiences as a change leader and what he believes will support CCC success. Participants will have opportunities for question and answer, individual reflection, and group discussion.*

# Collective Reflection on Change Leadership: What We Know About What It Takes

## Keren Stashower

### Leadership Mindset and Toolkit: Appreciative Inquiry (AI)

*Change efforts often rely on an assessment of deficits and development of projects to remediate issues that stand in the way of organizational goals. AI begins with assessment of what we already know and who we imagine we can become. AI gives us a view into the systems we are a part of, and the conditions that support our collective success. AI is more than a change tool; it's a collective change leadership mindset. Together we will experience a mini-AI summit which will explore CCC Change Leadership demands and best practices. Outcomes will include collective reflection on change leadership approaches that participants can use to inform college level change work. Discussion themes will also inform IEPI's future leadership development efforts.*

# Leadership Mindset: System Leadership

## John Kania, FSG Consultants

*John Kania believes that we can't drive social change. Rather, social change is accomplished when we gather people together across organizational and industry boundaries to better understand intractable, difficult issues as outcomes of systems we unwittingly help perpetuate. System leaders enable collective leadership: they move from planning change to holding space for change based on shared inquiry and experience. John will share the core capabilities and tools identified for system leadership and for teams committed to taking a system perspective. John will share stories that illustrate system leadership from his own work.*

# Leadership Toolkit:
# Mental Models

John Kania

*This is an exercise to get a quick read on how participants are viewing an issue, problem or opportunity. The goal is to make explicit the implicit "mental model" team members have in their minds related to a topic.*

*Use this page for the activity.*

# Leadership Toolkit:  Ecocycle

## John Kania

*The Ecocycle exercise is based on the premise that the long-term sustainability of adaptive organizations requires that elements of those organizations undergo periodic, natural processes of destruction and renewal.  The concept of an ecocycle draws on biological research into the closed loop system of development, conservation, destruction, and renewal that is seen in natural (ecological) systems.*

# Leadership Toolkit:  TRIZ

## John Kania

*TRIZ is a multi-step, structured facilitation technique that creates a safe space for innovation by helping a group of different stakeholders let go of what they know (but rarely admit) that might limit success of the group.  TRIZ was adopted from a Russian engineering approach that encourages innovation and creative destruction.*

# Leadership Toolkit: Collective Perspective Taking

## Keren Stashower

*A subset of CLAC members will engage in a live Collective Perspective Taking process that sparks dialogue on systemic interactions and structures that contribute to our current equity outcomes. This approach includes deep speaking and listening, which supports a team's increased capacity to see the larger system they are part of and consider leverage points for change. Summit participants will have an opportunity to practice the Collective Perspective Taking exercise and consider uses that support local change projects.*

# Overview: Appreciative Inquiry

## What Is It?

Appreciative Inquiry (AI) is a change mindset and approach that works on the assumption that whatever you want more of already exists in all organizations. Unlike traditional problem-solving processes, AI engages the entire system in an inquiry about what works. Through the AI inquiry, we discover the life-giving forces of the organization, analyze it for common themes and shape it into dreams of "what could be" and "what will be." The organization maintains the best of the past by discovering what it is and stretching it into the future.

AI is more consistent with organic or systems approaches to understanding organizations facing deeply rooted, interrelated challenges in complex environments. AI conversations uncover key mechanisms, relationships and conditions within an organization that help it thrive. Attention moves from a “find it; fix it” approach to change to a “discover it; grow it” approach.

## How Is It Different?

| Traditional Problem Solving | Appreciative Inquiry |
|---|---|
| Identification of the problem | Appreciating and valuing the best of “what is” |
| Analysis of causes | Envisioning “what might be” |
| Analysis of possible solutions | Dialoguing solutions “what should be” |
| Action plan | Innovating “what will be” |

## Why Use It?

Appreciative Inquiry invites employees at all levels to engage in a collaborative discovery of what makes their organization effective - in economic, ecological and human terms. This dialogue stirs up energy, creativity and excitement and leads to the co-creation of a vision of the future based on what is best about the organization. The AI process answers the question "How do we take what already works in pockets of this organization and help it grow and take hold in all of the organization?"

## How Can this Tool Help?

AI creates an environment where position is set aside, dialogue happens, and the future is built on the best from the past.  It creates momentum and positive energy across the whole organization.

## The Questions We Ask…Are Fateful…

| Problem Solving Approach | AI Approach |
|---|---|
| "What problems do you experience in your work?" | "Under what circumstances are you most productive?" |
| "What problems are you having?" | "What aspects of company personnel policy are particularly effective?" |
| "What is lacking in company personnel policy?" | "What possibilities exist that we have not yet considered?" |
| "Don't drop the ball." | "Catch the ball." |

This discovery phase is often followed by a "dream" phase where we envision what might be, the "design" phase that articulates how to get there and the "delivery" or implementation phase.  Each phase includes participants from throughout the organization and builds on the stories, energy, commitment, and learning generated in initial AI interviews.

The following sections focus on AI conversations that uncover conditions and positive past practices that are part of the organizational system your team is working to impact or change.

## Suggested AI Practice for Change Projects

When to use AI:  An AI inquiry or conversation can be used to help initiate a change project.  It can be used in a small, focused team or for a large cross-organizational effort that includes as many interested participants as possible.  It is like a research phase of a project.  AI asks:  Let's see what we have so we can build together?  Movement to a systems approach that includes AI can ignite fresh energy and create desired momentum.  It is also helpful to use AI when a project feels bogged down or stuck.  However, it will likely change the course and focus of the project along the way.

Who should be included: As a team, you may want to start with yourselves and any key others you know have a stake in the outcome. If you are considering creating change that will involve your entire organization, you may want to include as many people as you can. Either way, consider inclusion of students, external partners, the CCCCO and others. *Note: The larger the group, the more you may want to consider use of an external facilitator.*

Frame your question: Consider the focus of your change effort. Ask participants about a time they successfully accomplished or were part of accomplishing a change related to your topic. For example, when considering how to absorb impacts to budget cuts and realignment, a major university department asked faculty and staff to think of a time they felt proud of their work despite difficult financial circumstances. Results highlighted leadership practices and work conditions that supported faculty, staff and administrators during times of stress. Referring to themselves as the "little engine that could" gave the department focus and energy that built on a history of loyalty and commitment to shared goals.

Begin with stories: Following a statement of why you have gathered people together and some general introductions, ask everyone to recall a story that answers your questions. This is critical. AI is built on our memories and reflections of what had been, not our conjecture of what we think ought to be. Add prompts that include focus on important values, behaviors, conditions or actions that enhance and deepen story. Questions could include attention to when participants were "proud" of their work in relation to a change, or of the change itself. You might include a question about "3 wishes": what would they most like to see that would support these changes into the future? Ask participants to consider their story and take a few notes for themselves.

Share stories: Ensure they listen carefully to each other, and can share each other's stories with the rest of the group. Remind them to take notes.

Circle share: Bring pairs into larger groups and share each other's stories. Ask these larger groups to identify themes that cross all stories and be prepared to share with the larger group. Have a chart stand or piece of chart paper and a marker available for each group so they can list their themes.

Whole group conversation: As groups share their themes, listen for similarities and differences. Ask the larger group what they are hearing, what stands out, what needs to come next as you work together towards change. Unless the group is very large, you don't need to organize the themes into mega-themes.

Outcomes of the conversation can be distributed to all attendees. Change team members can use them to plan for areas of focus for the change effort. For further steps for using AI as the on-going approach to your change effort, see the references below.

# Reading List

Preskill, H. & Grindle, A. (2015). Guide to Appreciative Inquiry. FSP Consulting website at http://fsg.org

Grieten, S., Lambrechts, F., Bouwen, R,, Huybrechts, J., Fry, R. & Cooperrider, D. (2017). Inquiring into Appreciative Inquiry. *Journal of Management Inquiry, 2017(1), pp 1-15.*

Whitney, D. & Cooperrider, D. (2008). *Appreciative Inquiry Handbook for Leaders of Change.* San Francisco, CA: Barrett-Kohler, Inc.

Whitney, D. & Trosten-Bloom, A. (2003). *The Power of Appreciative Inquiry: A Practical Guide to Positive Change*. San Francisco, CA: Barret-Kohler Publishers Inc,

Whitney, D., Cooperrider, D., Trosten-Bloom, A. & Kaplin, B.S. (2005). *Encyclopedia of Positive Questions; Using Appreciative Inquiry to Bring Out the Best in Your Organization.* Gurney Heights, OH: Lakeshore Communications.

For a full list of AI resources visit the Appreciative Inquiry Commons website at http://ai.cwru.edu

# Overview:  Mental Model

## What Is It?

This is an exercise to get a quick read on how participants are viewing an issue, problem or opportunity.  The goal of this exercise is to make explicit the implicit "mental model" an individual has in her or his mind related to a topic (e.g., admissions processes, student supports).

Mental models are conceptual frameworks consisting of generalizations and assumptions from which we understand the world and take action in it. We may not even know that these mental models exist or are affecting us.  According to Peter Senge (author of the seminal systems thinking text, The Fifth Discipline) mental models are an important component of a learning organization since you must have a command of mental models in order to effectively build a learning organization.  Learning organizations are important because they facilitate and encourage learning within all levels of an organization, permitting the organization to adapt and transform in a complex environment. Mental models present some significant obstacles to learning and innovation.  According to Senge, mental models often limit the ways in which we think and act.  If our mental models are incorrect, we will make the wrong decisions.

As one enters a team oriented problem solving process, if you don't do some work around people's mental models, it will be considerably more challenging to build a shared picture of what is going on, and to create shared aspirations for the future.

## How Is It Different?

| Traditional Problem Solving | Mental Model Drawing |
|---|---|
| Often assumes everyone involved on the problem solving team is approaching with the same mental model | Assumes people working on the problem are coming with different mental models and underlying assumptions |
| Leaves implicit peoples' differing mental models | Makes explicit people's different mental models and assumptions |
| Can often get into the work of solving the problem without building relational space for people's different perspectives to surface | Provides a structured way for people's differences to surface prior to engaging in the problem solving work |
| Can often be very  left brain (logic) in approach | By asking people to draw their mental models, brings in right brain (creativity) |

## Suggested **Mental Model Drawing** Practice for Your Change Projects[1]

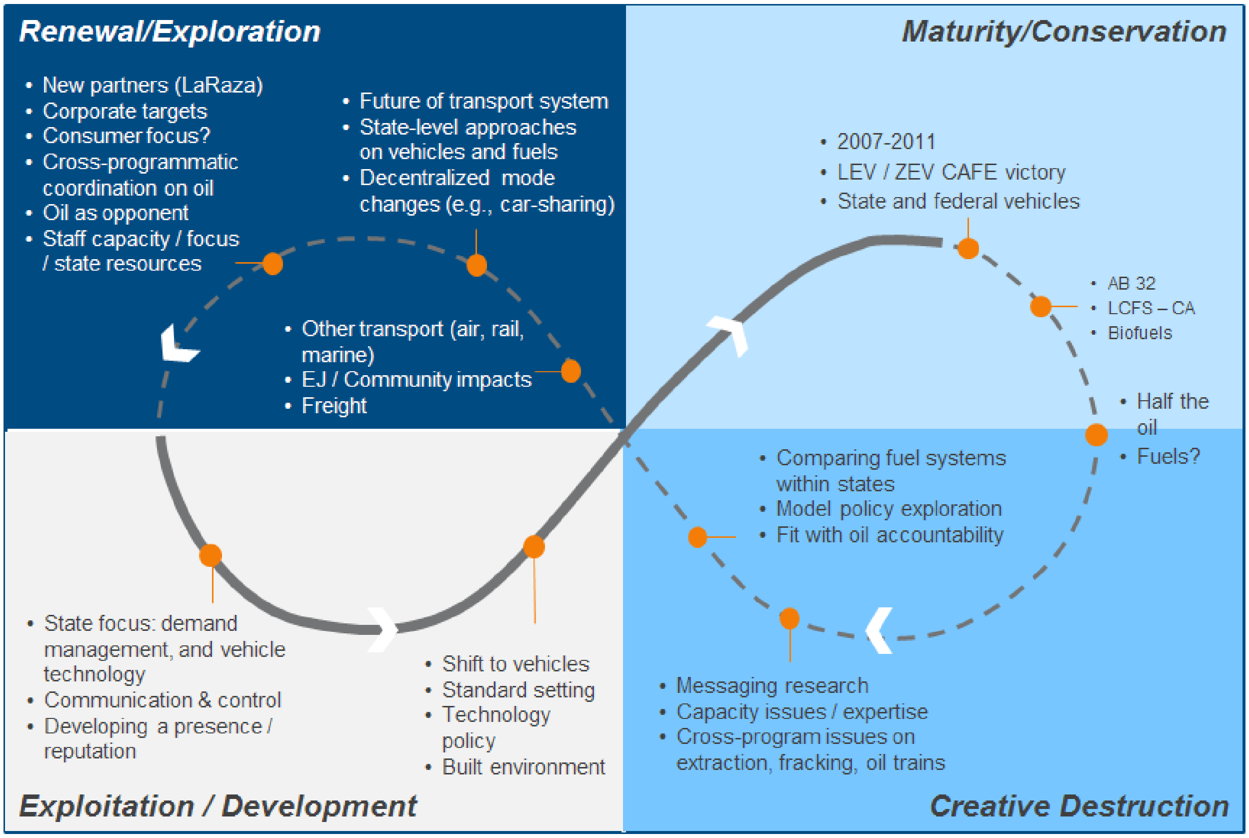
1. Ask team members to take 3 to 5 minutes to draw a picture of how they "see" the chosen topic.
2. The team can then share these drawings (and underlying assumptions) in pairs, in small groups, or as a large group. The size of the group depends on the time available and the extent to which participants are familiar with each other.
3. Following the sharing, a brief 10-15 minute large group discussion can focus on similarities and differences in assumptions, and implications among the participants' perspectives (aka mental models).

Mental models can also be demonstrated by using Play-Doh, picture collages, poems, or other manipulatives that can serve as metaphors for one's thinking.

[1] From: *Facilitating Intentional Group Learning*, Preskill, Gutierrez, Mack, FSG

# Guide to Ecocycle Mapping

Example Ecocycle Map: The Union of Concerned Scientists' Energy and Environment Program[2]




## ECOCYCLE MAPPING OVERVIEW

### What Is An Ecocycle?

The ecocycle is based on the premise that the long-term sustainability of adaptive organizations requires that elements of those organizations undergo periodic, natural processes of destruction and renewal. The concept of an ecocycle draws on biological research into the closed loop system of development, conservation, destruction, and renewal that is seen in natural (ecological) systems.

### What Is Ecocycle Mapping? [3]

The ecocycle framework is a visual depiction of where on the ecocycle different initiatives, programs, or even parts of an organization are currently operating.

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[2] Example is from the Union of Concerned Scientists 2014-15 strategy development process. The ecocycle maps were developed during a November day-long meeting with the organization's Leadership Team.

[3] Descriptions of the ecocycle framework throughout this guide are excerpted and lightly adapted from: Zimmerman, Brenda (2000). *Edgeware Primer*.

| How Can Ecocycle Mapping Support Systems Thinking and Practice? | | |
|---|---|---|
| ✓ | Patterns | • Understand how an organization is allocating its energy and resources across the lifecycle (and/or how this allocation has changed over time)<br>• Determine where the energy is in the system and where there are gaps or blockages<br>• Identify risks and diagnose challenges related to “traps” in the ecocycle<br>• Understand how a strategy or initiative is evolving from a lifecycle perspective |

# Ecocycle Mapping, Part One: Feasibility Assessment

## 1. Is Ecocycle Mapping Right for Your Project?

| Considerations | Use Ecocycle Mapping | Don’t Use Ecocycle Mapping |
|---|---|---|
| Boundaries | ✓ You have a clear topic for exploration on which there is some shared understanding among participants<br>✓ Your focus is “looking within” an organization, initiative, or strategy | x The topic for ecocycle mapping is not yet clear<br>x You want to understand the connections or relationships between activities, actors, or trends |
| Credible informants | ✓ Participants are familiar with the topic selected for the mapping activity and the organization or initiative’s work related to it | x Participants are not able to credibly speak to both the topic and/or the organization or initiative’s work in that area |

## 2. What do I need to properly facilitate an ecocycle mapping session?

A timeline mapping session typically takes about 75 minutes to facilitate. Preparation requirements are outlined below.

| | Description |
|---|---|
| **Total prep time** | 3-6 hours |
| **Client engagement in prep work** | Minimal – client is likely to be engaged in helping FSG frame the activity and identify an initial set of activities to include on the ecocycle mapping |
| **Prep work (activities)** | Frame activity<br>• Determine the topic for the mapping activity<br>• Describe for whom activities are being mapped (e.g., the organization, initiative, strategy, or program)<br>Background research (optional)<br>• Conduct interviews and/or document review to identify an initial set of activities that could be included on the ecocycle map |
| **Required materials** | • Facilitation agenda and talking points<br>• Worksheets (enough for at least 3 per group of 10-12 people)<br>• A large (approximately 36” x 48”) printed copy of the ecocycle framework<br>• Sticky notes for adding or moving information on the timeline<br>• Sticky dots (multiple colors)<br>• Markers, pens<br>• Flip charts (one per group of 10-12) |

## Ecocycle Mapping, Part Two Prep

- **Select a topic for discussion.** The topic can vary – the two most common types of topics are: 1) efforts occurring within a system or set of related systems that influence a desired outcome (e.g., efforts to improve early childhood health equity, efforts to curb tobacco use) and 2) efforts within or related to a client's particular area of work (e.g., a program or set of programs, a grant portfolio).
- **Do some research.** Consider preparing for the session by making an initial list of efforts that may be appropriate to place on the ecocycle. Information can be gathered through secondary research and/or interviews with people knowledgeable about the topic from different perspectives (internal and external).

## Ecocycle Mapping, Part Three Facilitating

This section below will help you prepare for and facilitate a 75-minute ecocycle mapping session. This activity can be conducted with any size group. Ideally, group members will bring a variety of perspectives (e.g., role in the system or organization, background, seniority/tenure). Depending on the chosen topic, the group may also include external participants.

## Getting Started: Room Setup and Materials Needed

- Allocate about 75-minutes hour for the ecocycle mapping session.
- Arrange the room so each group has a workspace with:
    - A large (approximately 36" x 48") copy of the ecocycle framework (shown below)
    - Blank sticky notes, sharpie markers, dot stickers in multiple colors, and a flip chart
- There is no preparation required for session participants.

## Getting Started: Seating and Materials

- Divide participants into groups of approximately 6-8 people. The groups should be large enough to include participants with a diversity of content expertise, levels of seniority, levels of tenure, and other relevant characteristics, but small enough that every participant can actively engage in the activity and discussion.
- Distribute an ecocycle mapping handout to each person. A sample handout may be found at the end of this guide.

# Facilitation Steps

## Introduction (15 minutes)

- Ask each group of 6-8 participants to gather at their workspace and provide an introduction to the ecocycle and the mapping exercise *(refer to the Talking Points at the end of this guide for sample verbiage).*

## (Optional) Brainstorming (5-6 minutes)

- *Ask each participant to take 5-6 minutes to brainstorm a list of major activities, practices, policies, and other efforts related to the topic of discussion.*

## Plot Major Internal and/or External Efforts on the Ecocycle Framework (15 minutes)

- Ask participants to rejoin their group of 6-8 people and gather around the large ecocycle framework.
- Ask each group to take 15 minutes to use the list of efforts they generated in the brainstorm and plot them on the ecocycle, based on their stage of development. Encourage the groups to briefly discuss the rationale for their plotting as they go along.

## 1. Analysis – Option One: Impact versus Resources (15 minutes)

*Note: this analytical approach is most appropriate when the subject of the mapping exercise is a specific initiative or organizational goal (e.g., improving 4th grade reading levels). The purpose of the analysis is to understand how resources are allocated relevant to perceived impact.*

- Prompt each group to indicate with green sticky dots the activities that have had (or are likely to have) the greatest impact on the goal (5 minutes).
- Prompt each group to indicate with red sticky dots the efforts that take the greatest percentage of time and resources at the organizational or initiative level (5 minutes).
- Encourage the groups to reflect on where there are significant mismatches between resource allocation and perceived impact.

## 2. Analysis – Option Two: Traps and Challenges (20 minutes)

*Note: this analytical approach is most appropriate when the subject of the mapping exercise is an organization, a department, or a portfolio of activities or investments. The purpose of the analysis is to understand where there are blockages or challenges to movement through the cycle.*

- Prompt each group to use blue markers to indicate the 1-2 quadrants with the greatest among of activity, and use orange markers to indicate the 1-2 quadrants with the least activity.
- Prompt each group to use red markers to highlight blockages in the movement of the system.
- Encourage the groups to reflect on what, if any, traps the organization/department/initiative is struggling with (e.g., parasitic trap). Refer to the handout for details on each trap.

## Full Group Reflection (30 minutes)

- *Gallery Walk:* Invite participants to pair up and take 10 minutes to walk through the room, observing other groups' work. Encourage participants to note similarities and differences across the groups' ecocycles.
- *Discussion:* Engage the full group in a discussion based on a selection of the following questions:
    1. What general patterns do you see in the way activities, practices, and policies are distributed across each stage?
    2. Where do you see opportunities to shift attention between phases to achieve greater balance?

3. **For groups that chose Analytical Option 1:** How well does the potential impact of efforts overlap with the time and resources required? Which potentially impactful activities might require more resources? Where might we (or others) scale back our resource investment due to low anticipated impact? What implications for action do we see in this map? What might it take for us to take these actions?
4. **For groups that chose Analytical Option 2:** What traps do we appear to be struggling with, based on the distribution of efforts on the ecocycle? Does the description of the trap ring true to you? What implications for action are there related to these traps? What might it take for us to take these actions?

## Next Steps

At the conclusion of the ecocycle mapping session, consider providing participants with a clear overview of next steps. For example, you may wish to share:

- Information about if or when participants will have another opportunity work on the maps (typically, additional iterations with the group will not be required, however they might be desirable in some situations);
- Information about who else may have an opportunity to view and/or edit the maps;
- Plans regarding the final format of the maps (for example, if they will be converted to a PowerPoint slide and distributed
- Plans regarding how the maps will be used within the organization or initiative; and
- Information about whether the maps will be made publicly available, and if so, to what end and with what audiences (typically, ecocycle maps will not be made public required, however this might be desirable in some situations)

Consider revisiting and updating the map at least every six months, or around key decision-making or learning junctures. One approach might be to reflect on the map with members of the original stakeholder groups and/or new participants and discuss the ways the distribution of efforts across the ecocycle has changed. Depending on participants' depth of knowledge/immersion in the area, consider grounding these update ecocycle mapping sessions in a series of external interviews and/or light-touch secondary research.

## Talking Points

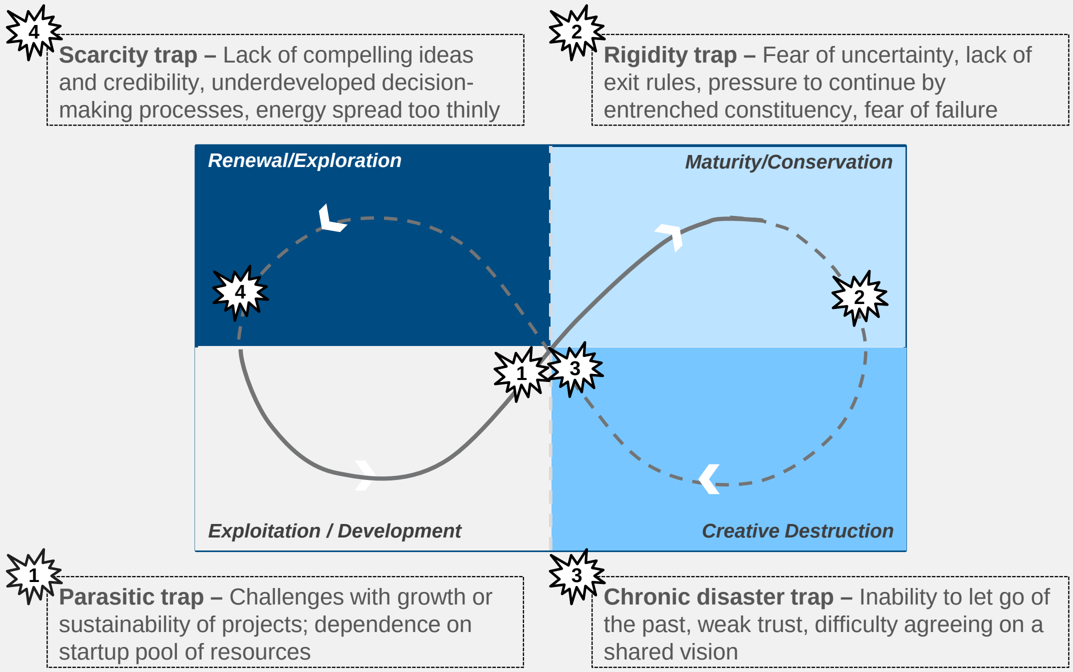
**Speaking Notes: Stage Setting Introduction**
*The facilitator should adapt the introduction below to correspond with the selected topic.*

**Introduction to the ecocycle framework**

- "The ecocycle framework will help us understand where we are currently allocating our energy and resources, and to:
  - Identify what we need to further invest in or deliberately stop doing in order to facilitate the health and renewal of our work
  - Determine the approaches and capacities needed for different phases of work

– Achieve diversity in our work to allow for successful adaptation over time.”

- “The ecocycle framework takes the shape of an infinity curve, symbolizing that there is no beginning or end to living systems. The ecocycle has four stages, each representing a different ‘life phase’ of activity. Each stage is characterized by unique features that play a role in ongoing adaptation, and each can pose a ‘trap’ that prevents an organization’s or initiative’s activities from continuing to adapt.”




“The ‘front side’ of the curve may be familiar to students of management studies or organizational development theory as the “S-curve”. This part of the loop focuses on moving from developing new ideas to engaging in deliberate planning and streamlining of efforts toward predictable success and efficiency. It usually stands alone in traditional management thinking, indicating that an organization or initiative’s development is complete upon achievement of “maturity.”

- “The ecocycle framework adds the ‘back side’ of the curve – the recognition that creative destruction and renewal are natural and essential for the ongoing viability of any system, including organizations and initiatives.”
- “A useful analogy for understanding the ecocycle is to think of what happens in a forest. Using this metaphor, we will now walk through the features of each phase of the cycle, and what happens when an organization or initiative become stuck in part of the cycle. We’ll start on the bottom left, with exploitation and development.”
- [Facilitator now walks through each phase of the ecocycle using the table below.]

| Phase | Potential Trap |
|---|---|
| **Exploitation/Development**<br>• This phase is like an open patch in a forest. There are a wide variety of species all competing for the resources, and none is dominant. There are a lot of births in this stage; however, many of the new births do not reach maturity.<br>• In organizations, this is an entrepreneurial period of high energy, lots of new ideas, and trial and error learning. Resources are spread over a variety of projects or activities. | **Parasitic Trap**<br>In time, there is a need to consolidate resources and invest in the most promising ideas. Having too many activities in this stage for too long create challenges with growth and sustainability. |
| **Maturity / Conservation**<br>• In the forest, competition starts to require efficiency. Resources become consolidated or conserved in a few trees that begin to dominate the space.<br>• In organizations, this phase involves planning, allocating resources to predictably successful activities, and streamlining operations for efficiency. Moving up the curve to this phase has been the aim of traditional management thinking. | **Rigidity Trap**<br>Activities can become too rigid and fail to adapt to current needs. There can be fear of failure or lack of exit plans. |
| **Creative Destruction**<br>• In the forest, this phase is the forest fire. The system is not fully destroyed in the fire. The fire releases nutrients and genetic material into the soil to create the conditions for new growth.<br>• In organizations, this phase involves letting go of activities that have become too rigid and similar and are not responsive to current needs to free resources and create the conditions for developing new ideas.<br>• It can be hard to acknowledge that some activities have lost their vitality or are not meeting current needs.<br>• But, this phase can be a time for new insights and is crucial for freeing up resources to invest in new ideas that have more promise for the future. | **Chronic Disaster Trap**<br>Organizations find themselves spinning and unable to form a compelling vision and set of values. There is weakened trust and difficulty agreeing on a vision for the future. |
| **Renewal/Exploration**<br>• In a forest, this is the phase after the fire where open spaces have been created. The soil is rich with nutrients and there are many possibilities for how these nutrients will be recombined. It is rich with potential but it is not clear what combinations will be most successful.<br>• In organizations, this is a stage of creating connections, mobilizing resources and skills to create the next generation of effective ideas. | **Scarcity Trap**<br>Compelling, credible ideas fail to emerge due to underdeveloped decision-making; energy is spread too thinly. |

**Summary**

- "A healthy forest has patches – it has parts in each of the four phases. This looks disorganized, but keeps the forest viable and resilient over the long term. Firefighters, recognizing this, now selectively let fires burn or even set fires intentionally to clear away dead wood and free nutrients for new generations of growth."
- "The ecocycle shows us that it is not enough for organizations and initiatives to move up the front side of the growth curve, but also to engage in creative destruction and renewal.
- The activities and structures we use to do our work are not the essence of our work. Letting go and experiencing change are essential aspects of keeping our work vital and viable to achieve our aims over the long term."

"Today, we will use the ecocycle framework to understand and identify implications for our efforts to [state goal here].

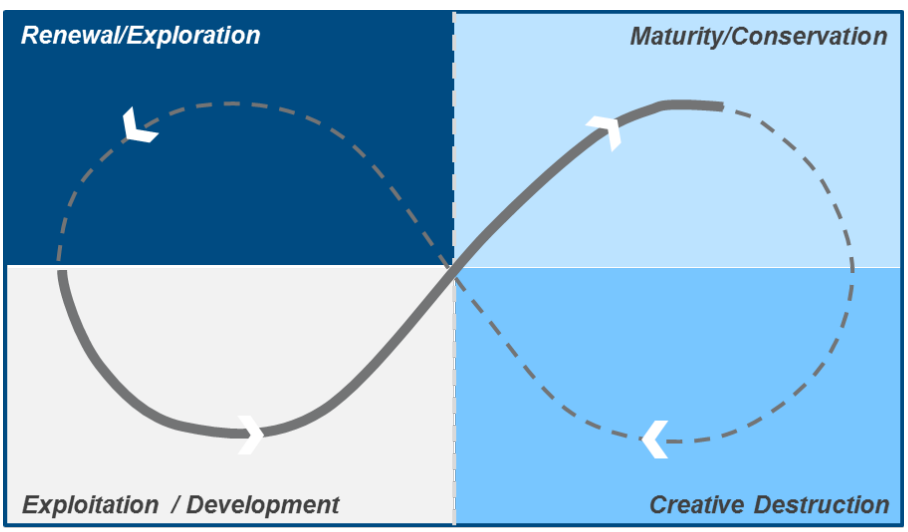
"Before we begin, are there any questions about the ecocycle framework or how we will use it to inform our work?"

# Ecocycle Mapping Activity – Participant Handout

## Introduction to the Ecocycle Framework

- The ecocycle framework will help us understand where we are currently allocating our energy and resources, and to:
    - Identify what we need to further invest in or deliberately stop doing in order to facilitate the health and renewal of our work
    - Determine the approaches and capacities needed for different phases of work
    - Achieve diversity in our work to allow for successful adaptation over time

- The ecocycle framework takes the shape of an infinity curve, symbolizing that there is no beginning or end to living systems and the interconnectedness of all things. The ecocycle has four stages, each representing a different 'life phase' of an activity. Each stage is characterized by unique features that play a role in ongoing adaptation, and each can pose a 'trap' that that prevents an organization's activities from continuing to adapt.




- The 'front side' of the curve may be familiar to students of management studies or organizational development theory as the "S-curve". This part of the loop focuses on moving from developing new ideas to engaging in deliberate planning and streamlining of efforts toward predictable success and efficiency. It usually stands alone in traditional management thinking. The ecocycle framework adds the 'back side' of the curve – the recognition that creative destruction and renewal are natural and essential for the ongoing viability of a system or organization.

- A useful analogy for understanding the ecocycle is to think of the complex system of a forest. The table on the next page outlines the features of each phase of the cycle, beginning with moving up the traditional 'S' curve. Throughout, it refers to the forest metaphor to bring the ecocycle to life.

| Phase | Potential Trap |
|---|---|
| Exploitation/Development<br>• This phase is like an open patch in a forest. There are a wide variety of species all competing for the resources, and none is dominant. There are a lot of births in this stage; however, many of the new births do not reach maturity.<br>• In organizations, this is an entrepreneurial period of high energy, lots of new ideas, and trial and error learning. Resources are spread over a variety of projects or activities. | Parasitic Trap<br>In time, there is a need to consolidate resources and invest in the most promising ideas. Having too many activities in this stage for too long create challenges with growth and sustainability. |
| Maturity / Conservation<br>• In the forest, competition starts to require efficiency. Resources become consolidated or conserved in a few trees that begin to dominate the space.<br>• In organizations, this phase involves planning, allocating resources to predictably successful activities, and streamlining operations for efficiency. Moving up the curve to this phase has been the aim of traditional management thinking. | Rigidity Trap<br>Activities can become too rigid and fail to adapt to current needs. There can be fear of failure or lack of exit plans. |
| **Creative Destruction**<br>• In the forest, this phase is the forest fire. The system is not fully destroyed in the fire. The fire releases nutrients and genetic material into the soil to create the conditions for new growth.<br>• In organizations, this phase involves letting go of activities that have become too rigid and similar and are not responsive to current needs to free resources and create the conditions for developing new ideas.<br>• It can be hard to acknowledge that some activities have lost their vitality or are not meeting current needs.<br>• But, this phase can be a time for new insights and is crucial for freeing up resources to invest in new ideas that have more promise for the future. | Chronic Disaster Trap<br>Organizations find themselves spinning and unable to form a compelling vision and set of values. There is weakened trust and difficulty agreeing on a vision for the future. |
| **Renewal/Exploration**<br>• In a forest, this is the phase after the fire where open spaces have been created. The soil is rich with nutrients and there are many possibilities for how these nutrients will be recombined. It is rich with potential but it is not clear what combinations will be most successful.<br>• In organizations, this is a stage of creating connections, mobilizing resources and skills to create the next generation of effective ideas. | Scarcity Trap<br>Compelling, credible ideas fail to emerge due to underdeveloped decision-making; energy is spread too thinly. |

- A healthy forest has patches – it has parts in each of the four phases. This looks disorganized, but keeps the forest viable and resilient over the long term. Firefighters, recognizing this, now selectively let fires burn or even set fires intentionally to clear away dead wood and free nutrients for new generations of growth.

- The ecocycle shows us that it is not enough to move up the front side, the ‘S’ curve, but also to engage in creative destruction and renewal. The activities and structures we use to do our work are not the essence of our work. Letting go and experiencing change are essential aspects of keeping our work vital and viable to achieve our aims over the long term.

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# Additional Resources

- Liberating structures: Ecocycle planning exercise
- The Ecocycle: A Mental Model for Understanding Complex Systems. David Hurst writes about some additional ideas about the ecocycle and its adaptation, March 2012.
- Frances Westley presentation at FSG retreat, February 2015.

# Overview: TRIZ

## What Is It?

What is made possible? You can clear space for innovation by helping a group let go of what it knows (but rarely admits) limits its success and by inviting creative destruction. **TRIZ** makes it possible to challenge sacred cows safely and encourages heretical thinking. The question "*What must we **stop doing** to make progress on our deepest purpose?*" induces seriously fun yet very courageous conversations. Since laughter often erupts, issues that are otherwise taboo get a chance to be aired and confronted. With creative destruction come opportunities for renewal as local action and innovation rush in to fill the vacuum. Whoosh!

## How Is It Different?

| Traditional Problem Solving | TRIZ |
|---|---|
| Focuses on what others can change in order to address the problem | Focuses on what you are doing that may be contributing to the problem |
| Often avoids sacred cows | Invites conversation about sacred cows |
| Tends towards the serious, which can sometimes limit creativity | Invites humor and laughter to encourage new ways of thinking |
| May add new activities on top of existing ones | Asks the question: "What will we stop doing? |

## Suggested TRIZ practice for change projects[4]

[4] Tool Guide instructions were adapted from the Liberating Structures website: http://www.liberatingstructures.com/6-making-space-with-triz/

### Five structural elements

1. **Structuring Invitation**
   In this three-step process, ask:

- 1. “Make a list of all you can do to make sure that you achieve the worst result imaginable with respect to your top strategy or objective.”
- 2. “Go down this list item by item and ask yourselves, ‘Is there anything that we are currently doing that in any way, shape, or form resembles this item?’ Be brutally honest to make a second list of all your counterproductive activities/programs/procedures.”
- 3. “Go through the items on your second list and decide what first steps will help you stop what you know creates undesirable results?”

**2. How Space Is Arranged and Materials Needed**

- Unlimited number of small groups of 4 to 7 chairs, with or without small tables
- Paper for participants to record

**3. How Participation Is Distributed**

- Everybody involved in the work is included
- Everyone has an equal opportunity to contribute

**4. How Groups Are Configured**

- Groups with 4 to 7 participants
- Established teams or mixed groups

**5. Sequence of Steps and Time Allocation**

- After introduction, three segments, 10 minutes for each segment
- Introduce the idea of **TRIZ** and identify an unwanted result. If needed, have the groups brainstorm and pick the most unwanted result. 5 min.
- Each group uses **1-2-4-All** to make a first list of all it can do to make sure that it achieves this most unwanted result. 10 min.
- Each group uses **1-2-4-All** to make a second list of all that it is currently doing that resembles items on their first list. 10 min.
- Each group uses **1-2-4-All** to determine for each item on its second list what first steps will help it stop this unwanted activity/program/procedure. 10 min.

# Overview: Collective Perspective Taking

## What is it

Complex, deeply entrenched issues can't be solved by a single person, role or expertise. System Leadership requires deep, reflective, and engaging conversations about issues related to desired changes that are often conflictual and controversial. This team activity helps teams to have richer and thoughtful conversations about important topics. In the process, teams are better able to identify the variety of perspectives held within the group.

## How Is It Different?

| Problem Solving | Collective Perspective Taking |
|---|---|
| Free flowing sharing of thoughts and reactions | Considered response based on real time reflection |
| Listening and speaking are often focused on convincing others and changing minds which erodes trust and increases defensiveness. | Listening is separated from speaking as each member must attend to what is said before them, which can build trust and mutual understanding. |
| Goal is agreement and a single shared perspective | Goal is multiple perspectives all held at by the group the same time. |
| Listening moves to action. | Listening focuses on understanding. |

## How Can This Tool Help?

Collective Perspective Taking allows a group to slow down and listen more closely to each other. In addition to understanding issues from multiple perspectives, listening closely helps build a foundation of trust that leads to a more constructive and inclusive team environment.

As actions are considered, the team works from a fuller picture. Action plans become more proactive, nuanced and potentially creative as members work together from shared understanding rather than individual assumptions and favored solutions.

## Suggested Practice

Bring chairs into a circle, preferably without a table in the middle. Whoever is designated to begin asks a question about the change topic to the person on their right. Questions can include "what do you think stands in our way?", "from your perspective, what needs to come next?" or "from your perspective, what are we not seeing?"

The person on their left thinks for a moment, and then answers. Everyone listens without interruption. This person then considers their own question, and asks it of the person on *their* left who thoughtfully considers and responds. This process continues around the circle until everyone has had an opportunity to speak and question.

Once completed, the group reflects on what they have heard. What was surprising? What did they learn? Where is there agreement? Where do they have different points of view? What else needs to be said? Typically, this follow-on conversation will continue to have elements of deeper listening and slower responding to ensure that all members take the time to understand each other's perspectives.

## Outcomes

Charting or notetaking is helpful in tracking the team's reflections that can be used later for planning and discussions about what must come next. Trust is built as team members feel more clearly "heard". In the future, the team may shift into deeper listening with a reminder prompt ("let's take the time to listen to each other here").

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# Speaker Profiles

# Eloy Ortiz-Oakley

## Chancellor for the California Community Colleges

Eloy Ortiz Oakley is Chancellor for the California Community Colleges. As Superintendent-President of the Long Beach Community College District, he fostered strong relationships with members of the community, state and national policy leaders, his Board of Trustees and college faculty and staff. He has provided statewide and national leadership on the issue of improving the education outcomes of historically underrepresented students. Oakley serves on several education and community boards and committees. He earned his B.A. in Environmental Analysis and Design and his MBA at University of California, Irvine.

# John Kania, MBA


## FSG, Global Managing Director

**john.kania@fsg.org**


John Kania is Global Managing Director of FSG, a nonprofit consulting firm supporting leaders in achieving large scale lasting social change. In additional to overseeing FSG, John consults to clients in a variety of sectors including education, health care, global development, community development, and the environment. Prior to joining FSG, John was a management consultant with Mercer Management Consulting. He began his career as an advertising executive with Leo Burnett Company. John is co-author of the book, Do More Than Give: The Six Practices of Donors Who Change the World. He is also one of Stanford Social Innovation Review's most frequently published authors, with recent articles: Collective Impact (2011), Strategic Philanthropy for a Complex World (2014) and The Dawn of System Leadership (2015). John speaks frequently around the world on accelerating social impact and systems change. John has an M.B.A. from Northwestern's Kellogg Graduate School of Management and a B.A., cum laude, from Dartmouth College.

# Keren Stashower


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Keren specializes in strategic organizational assessment and design of large-scale planning and change efforts. She works with clients to support effective organizational development, change and growth. She is a master facilitator who works with groups to develop the trust and candor necessary to collaborate effectively and address the multifaceted issues of today's complex, shifting world. Drawing from extensive study and her experience as a former healthcare executive, Keren delivers high impact teambuilding efforts, multiple leadership development programs and facilitated large multi-stakeholder group discussions. Keren's current interests and specializations include complexity and change, strategic thinking, emerging leadership effectiveness, organizational communication and trust, transformational learning, collaboration across departments, leadership development and systems thinking. Keren's doctoral and masters studies are in leadership studies including human and organizational systems and social work, and includes a focus on transformational learning for social justice.

# Expand Your Network

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