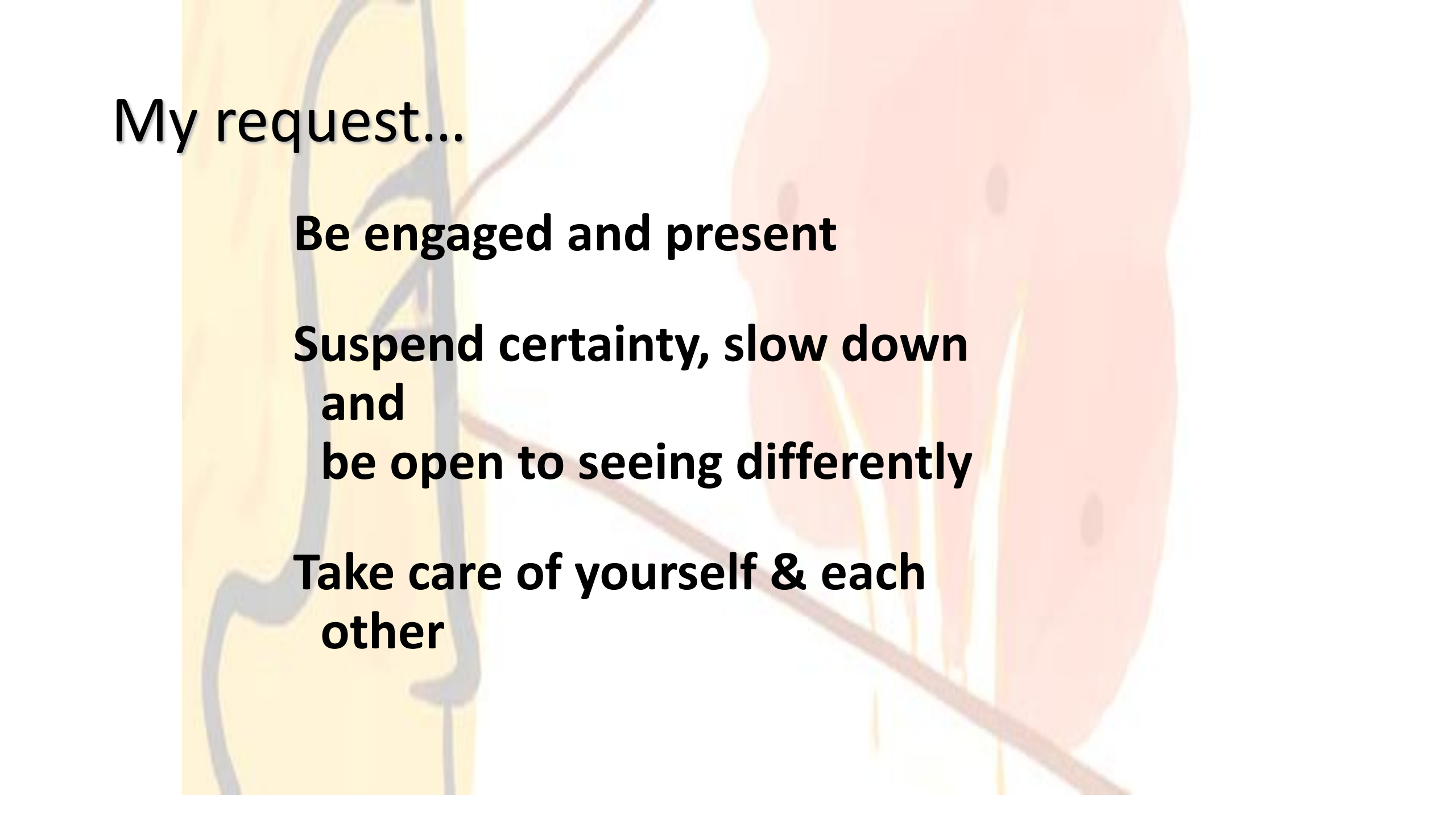




AISA's School Leader Retreat

March 7-8, 2015





My request...

Be engaged and present

**Suspend certainty, slow down
and
be open to seeing differently**

**Take care of yourself & each
other**



Learning for Governing



Our focus...

The shifting roles of CEO & Board

Chait's model of fiduciary, strategic and generative roles

Understand the difference between task, mode and style

Head of School as leader of their Board's learning

Supporting the changing roles of the CEO/Board relationship

Governance as Leadership & Leadership as Governance

Your perspective

First on your own...

Jot down 3-4 phrases that describe the work your Board does; what is managed by committees; whether you use “taskforces”

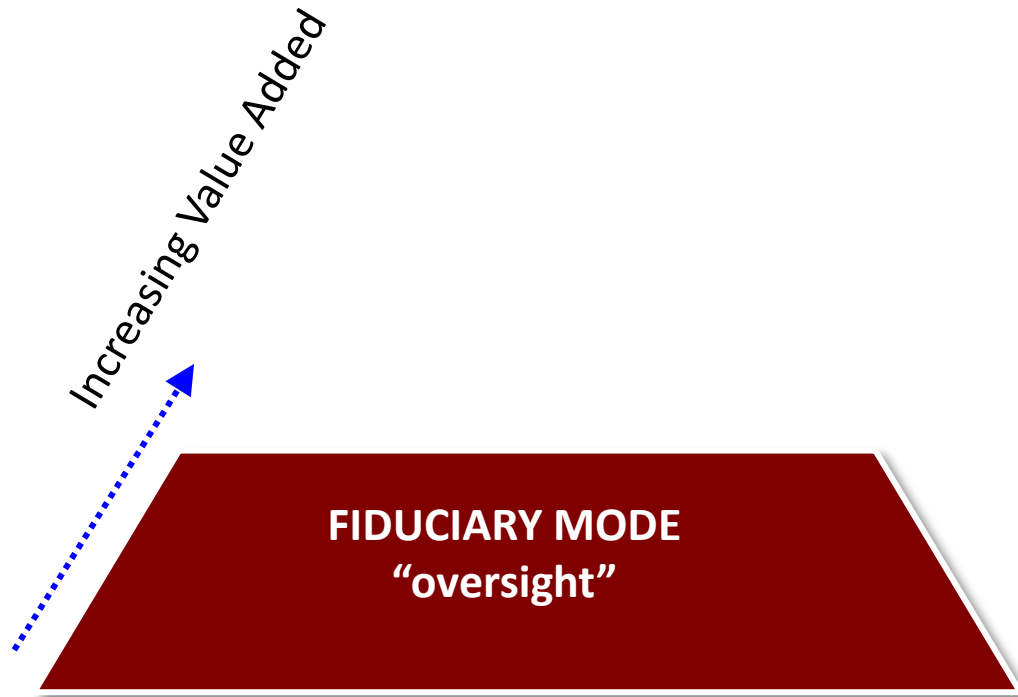
Discuss with your tablemates

Be ready to share similarities/differences

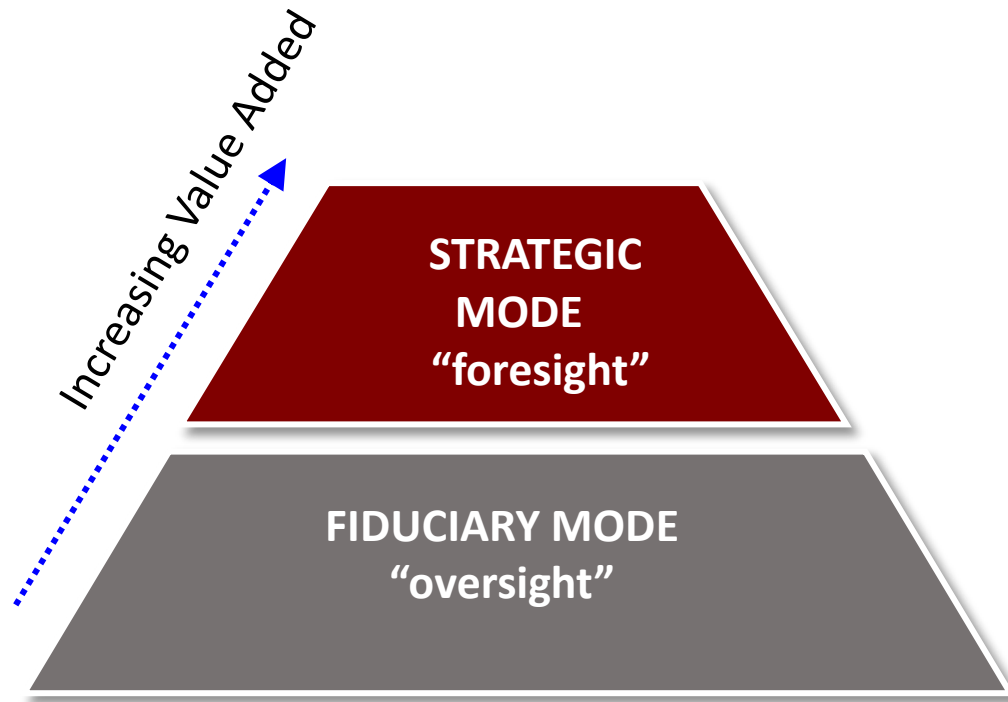
Migratory governance



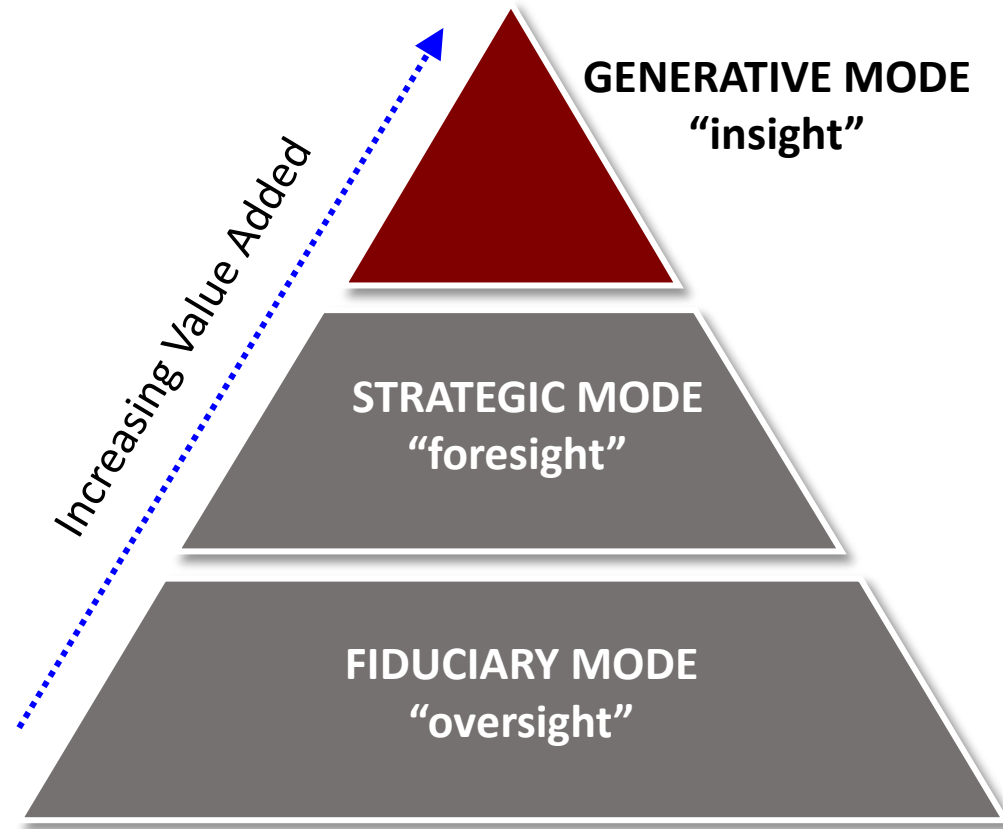
Type I: Boards provide stewardship of tangible assets



Type II: Boards create strategic partnerships with leaders

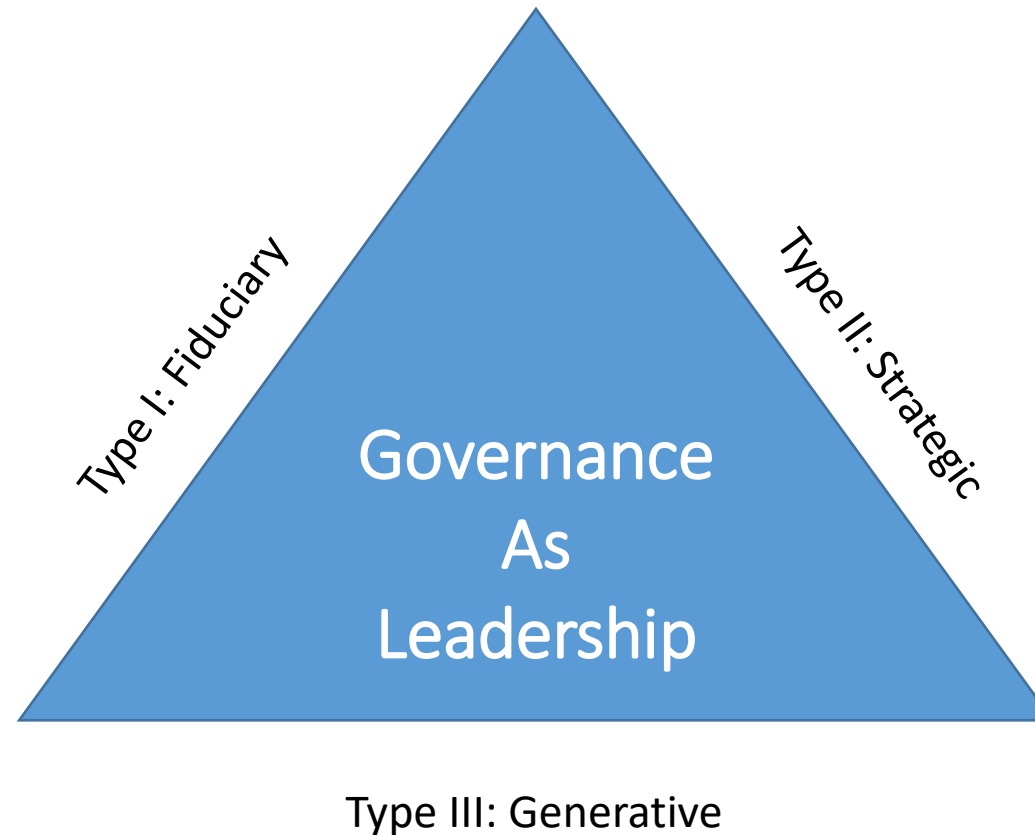


Type III: Boards provide a less recognized but critical source of leadership



What percentage of its time does your board spend on the tasks of each of the areas?

The governance triangle



What sense are you making of this?

What implication does it have for you?

Governing: task or mode?

Tasks

Modes/cognitive approach

Type 1:
Fiduciary

Conducting audits, oversight routines to ensure resources are used efficiently

Productively converting organizations resources into assets; deploy assets to achieve goals

Type 2:
Strategic

Moving the organization from its present to its preferred future

Logical; capable of understanding & predicting external/internal influences

Type 3:
Generative

Considering preferred future; new “frames” and shared meaning

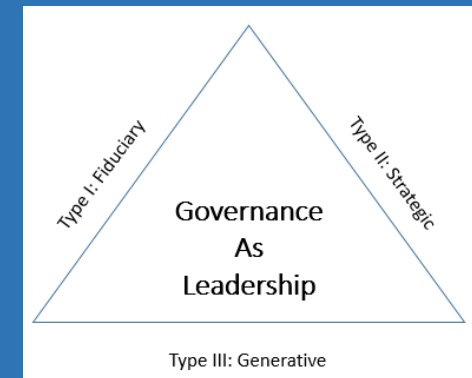
Concern with values, judgment & insight

Board style and structure

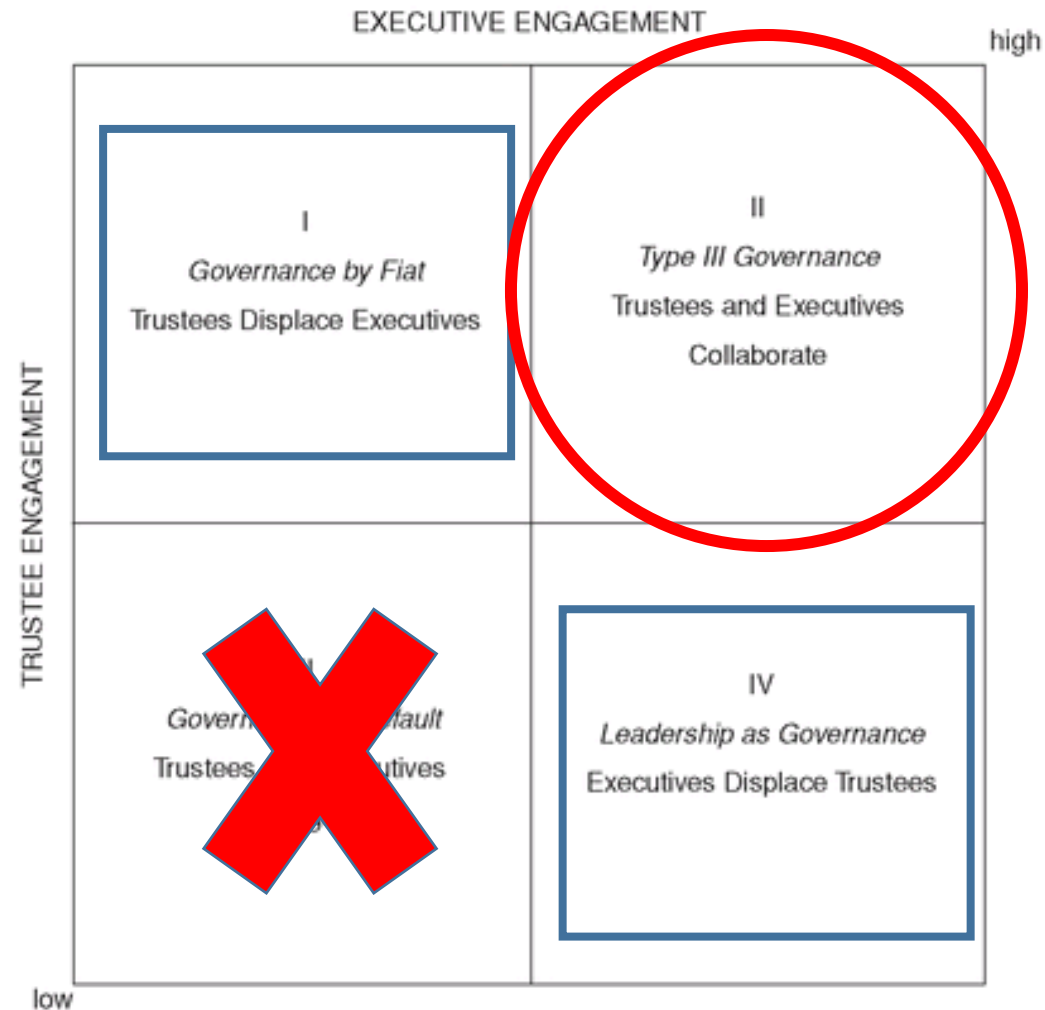
Style	The mental map...	Potential consequence...
Type 1:	Focus on legal compliance and financial equilibrium; fixed committees--one for each functional area; protocols of oversight are the basic template for meetings; listen to reports; function follows form; Roberts Rules shape discourse; model bureaucratic organization of early 20 th Century—closed systems	Fatigue and boredom with routinized work Can jeopardize the very fiduciary value they need to provide
Type 2:	Envisions and shapes organizational direction; thinks strategically; form follows function; organizations as living systems—open systems	Board becomes a strategic asset for the organization; structure and communication organize around strategic priorities
Type 3:	Noticing cues and clues; choosing and using “frames” for sense making; thinking retrospectively; trustees and executive collaborate	More informed direction-setting; greater use of trustees’ talents; greater ambiguity in board/staff relationships

Governance as leadership is:

- ✓ a complex activity that can't be practiced based on prescribed tasks/modes.
- ✓ choosing governing modes.



Balanced engagement: Generative governance



Your learning...

What learning is taking shape for you conceptually?

What implications for your practice are becoming clearer?

Are there competencies you have that will help?

Are there competencies you will need in order to take the action you imagine?

What are the dispositions required to consider generative governance?

Governing for the Future



Our focus...

Macro trends in the design of learning

Skills for success in the future

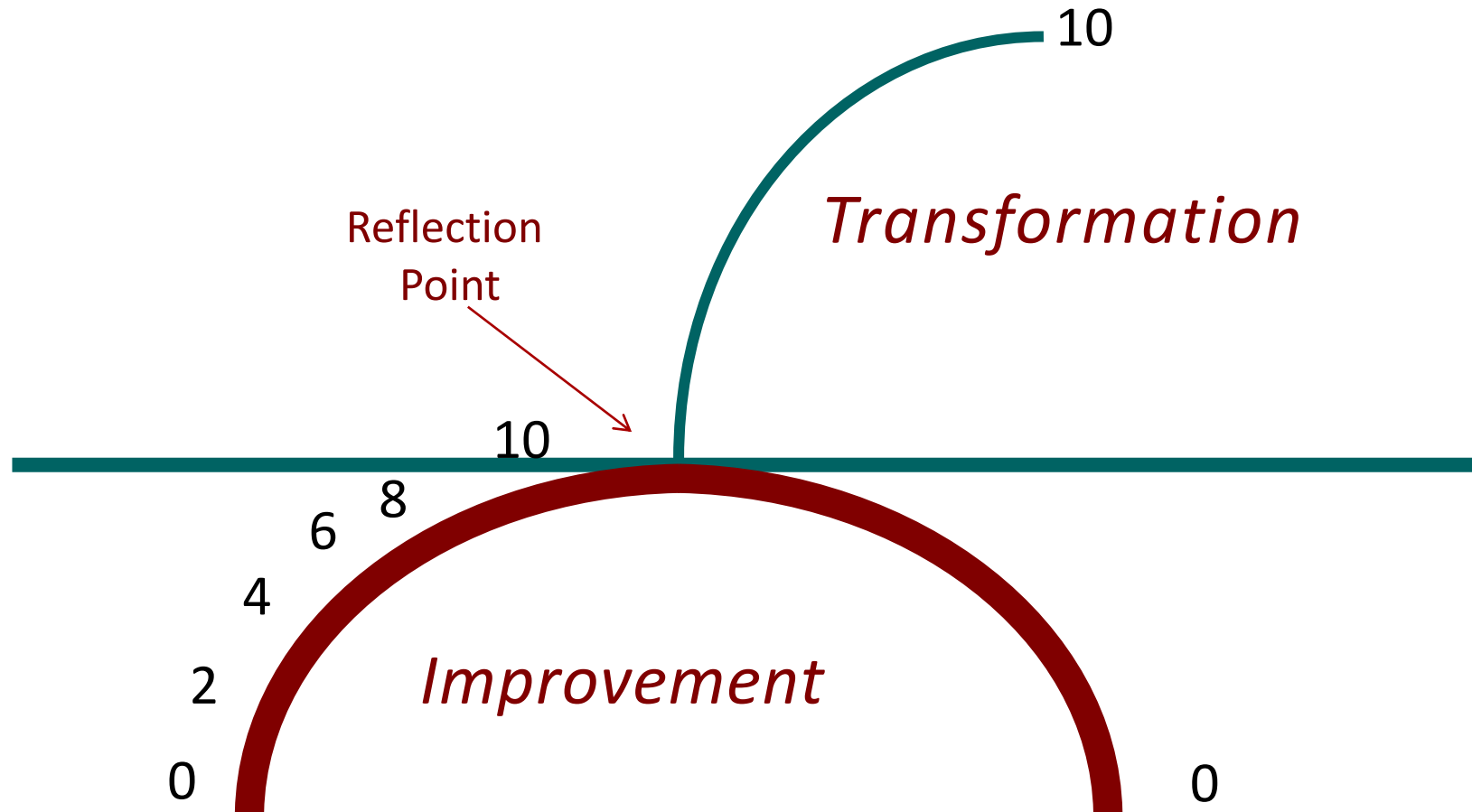
The role of generative conversations: what & how

Developing the skills of generative conversation

How often and about what?

Learning conversations

Life cycle of human systems



MACRO VIEW

A Glimpse into the Future of Learning

In the future...

For KnowledgeWorks' full forecast on the future of learning, see *Recombinant Education: Regenerating the Learning Ecosystem* knowledgeworks.org/strategic-foresight

These changes point the way toward a diverse learning ecosystem in which learning adapts to each child instead of each child trying to adapt to school.

"School" will take many forms. Sometimes it will be self-organized.

Learning will no longer be defined by time and place — unless a learner wants to learn at a particular time and in a particular place.

Learners and their families will create individualized learning playlists reflecting their particular interests, goals, and values.

Those learning playlists might include public schools but could also include a wide variety of digitally-mediated or place-based learning experiences.

Whatever the path, radical personalization will become the norm, with learning approaches and supports tailored to each learner.

Educators' jobs will diversify as many new learning agent roles emerge to support learning.

A wide variety of digital networks, platforms, and content resources will help learners and learning agents connect and learn.

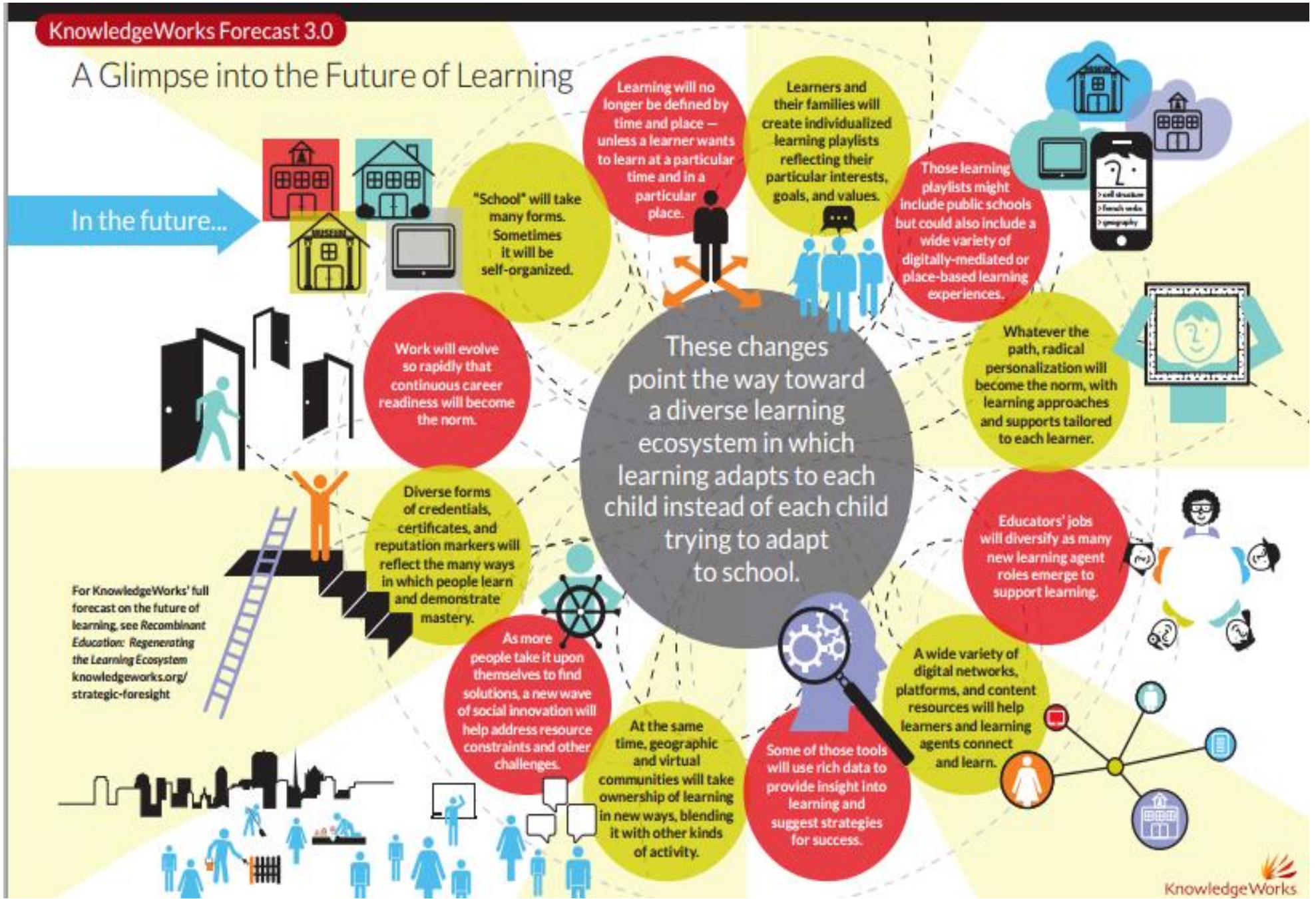
Some of those tools will use rich data to provide insight into learning and suggest strategies for success.

At the same time, geographic and virtual communities will take ownership of learning in new ways, blending it with other kinds of activity.

As more people take it upon themselves to find solutions, a new wave of social innovation will help address resource constraints and other challenges.

Work will evolve so rapidly that continuous career readiness will become the norm.

Diverse forms of credentials, certificates, and reputation markers will reflect the many ways in which people learn and demonstrate mastery.



Exploring trends

In groups of 3-4; explore the 6 trends in the 2020 Forecast and the 5 disruptions in the 3.0 document.

Notice the “opportunity” and “challenge” (Forecast 3.0)

Discuss

How is this showing up in your school now?

What role is your school playing in these changes?

What implications might all of this have for your trustees?

Generative Conversation

Structure of Attention

ATTENDING (individual)



Listening 1:
Downloading habits of judgment

Reconfirming old habits and judgments



Listening 2:
Factual, object-focused

Open Mind

Disconfirming or new data



Listening 3:
Empathic listening

Open Heart

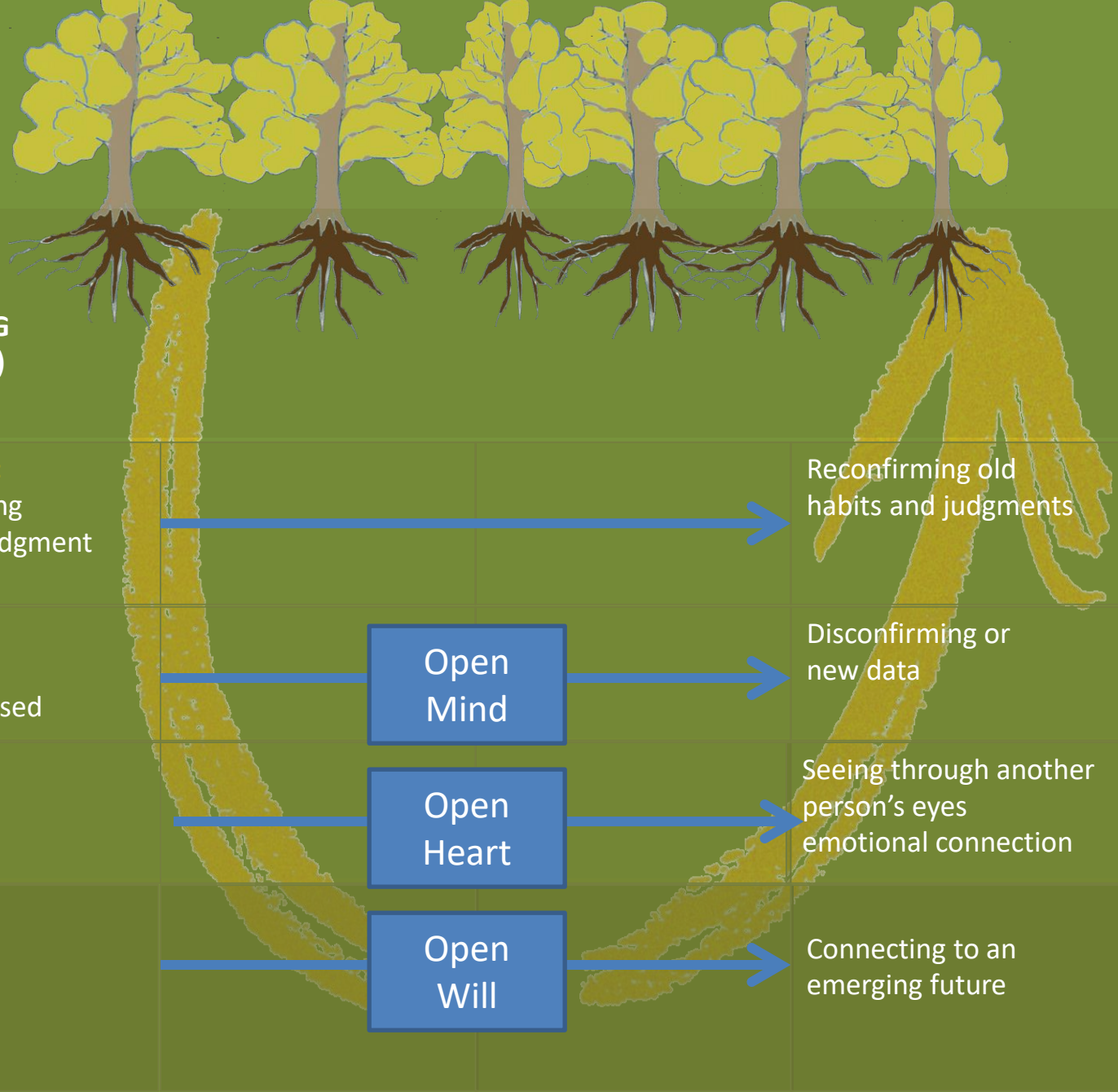
Seeing through another person's eyes
emotional connection



Listening 4:
Generative listening

Open Will

Connecting to an emerging future



Introducing these conversations to trustees

Find 2-3 colleagues:

Using the resources here—or others you have:

- Design one or more approaches—for introducing/continuing—the conversation about future trends to your trustees

- Consider how to incorporate the characteristics of generative conversations

- Be ready to share the approach with all of us in 20 minutes



Governing Learning



Our focus...

Start with your mission-ensuring a shared vision

How does your board conceptualize its role?

Integration vs “add on”

Unpacking mission/vision

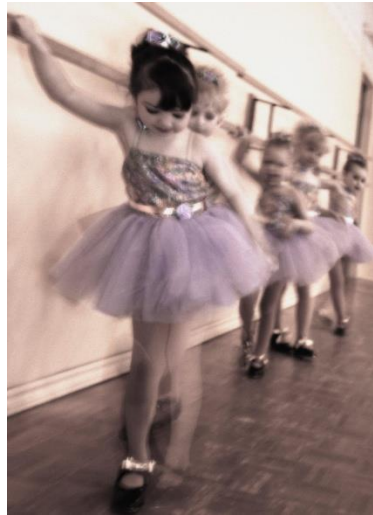
Operationalizing mission/vision

Measuring the difficult to measure

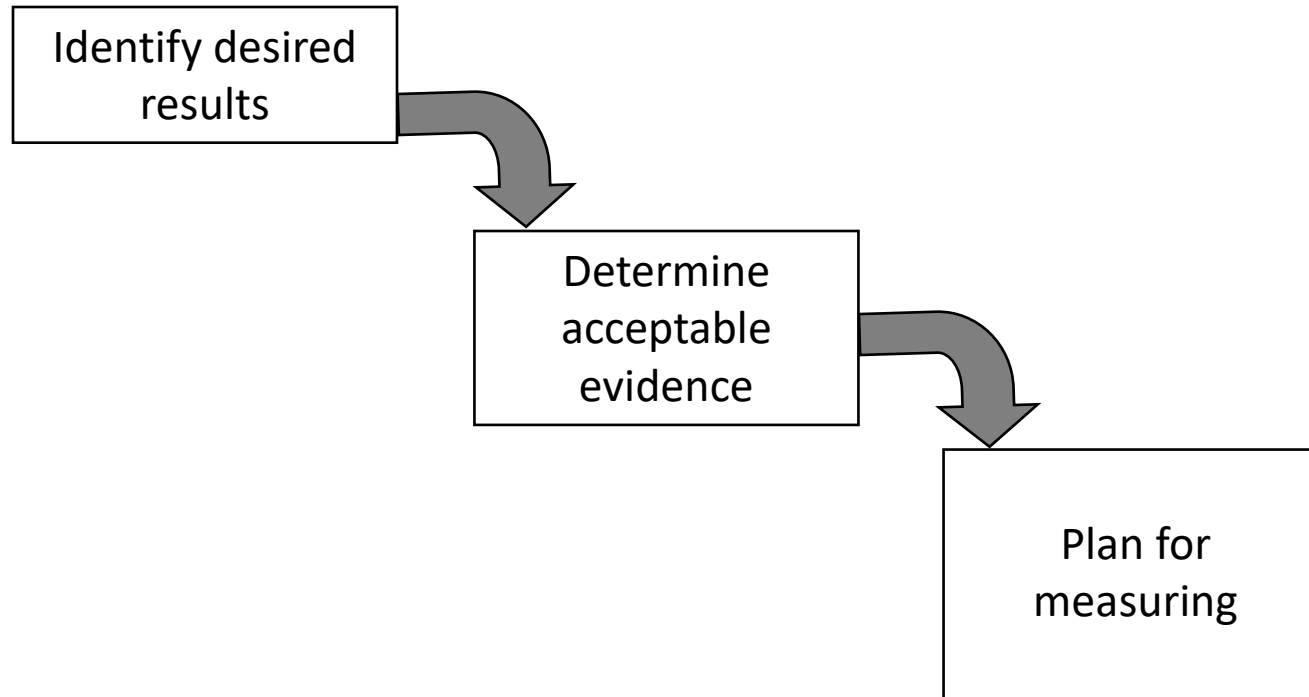
Indicators

Performance measures

Performance assessment is the process of using observation and professional judgment to evaluate formative and summative performance based on clearly defined criteria.



Using backward design



Criteria

Parent as nurturer

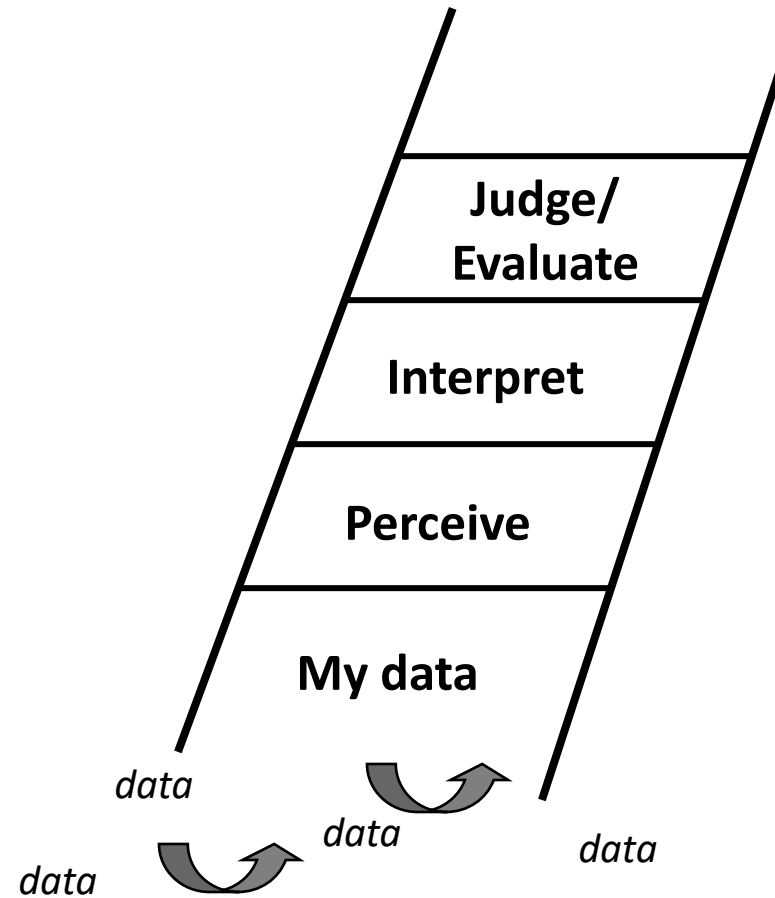
Trait →

Independent/ Confident	Applying/ Internalizing	Understanding	Developing Awareness	Beginning
Spends quality time one-to-one with child; is available; takes responsibility for the way time is spent.	Begins to set aside time for children; ex: play, discussion, quiet time, reading.	Realizes that spending time is important but seems to apply only when convenient or socially acceptable.	Acknowledges or recognizes that spending time is important; expresses the desire to do so; notices others who do this.	Views the child as "in the way"; ignores responsibility to spend time with child.
Consistently uses a variety of positive discipline methods.	Chooses appropriate discipline methods; practices self-control most of the time; tries to avoid a physical response such as hitting.	Recognizes positive discipline is beneficial; willing to try new methods; tries to avoid physical punishment.	Wants info about better discipline methods but often falls into negative habits; becomes frustrated with child easily.	Uses negative punishment primarily; mainly gives negative feedback.

...positive contributions to community.

	Exemplary	Proficient	Developing	Beginning
Insights/Sensitivity	<p>Seizes opportunities to learn about community and environmental needs.</p> <p>Builds enthusiasm and compassion in others when bringing ideas to ISOI about service for the community.</p>	<p>Actively engages in learning about community and environmental needs.</p> <p>Identifies and explains what he/she wants to contribute to the community. Independently discusses community service opportunities with others.</p>	<p>Relies on guidance to learn about community and environmental needs.</p> <p>Discusses community service opportunities with others.</p> <p>Demonstrates an awareness</p>	<p>Has difficulty identifying opportunities to learn about community and environmental needs.</p> <p>Primarily identifies with his/her personal interests.</p>
Action/Motivation	<p>Identifies and develops new opportunities for community and environmental service.</p> <p>Takes a leadership role in community or environmental service organizations or activities.</p> <p>Commits significant personal time to community or environmental service.</p>	<p>Seeks out opportunities to perform community and environmental service.</p> <p>Participates in community or environmental service organizations or activities.</p> <p>Commits personal time to community or environmental service.</p>	<p>Suggests ideas to support community and environmental service but lacks the skills to initiate action.</p> <p>With encouragement becomes involved in community or environmental service organizations or activities.</p> <p>Engages in community or environmental service only when it is convenient.</p>	<p>Even with support has difficulty suggesting ideas to support community and environmental service.</p> <p>Avoids engaging in community or environmental service organizations or activities.</p> <p>Reluctant to spend personal time on community or environmental service.</p>
Reflection	<p>Shares excitement over the significance and impact of service, and prepares to take actions that lead to additional service.</p> <p>Consistently and objectively self-assesses personal involvement to improve service impact.</p>	<p>Discusses with others the significance and impact of his/her service and is willing to expand his/her involvement.</p> <p>Independently self-assesses personal involvement to improve service impact.</p>	<p>Needs guidance to share conclusions about his/her past service and ideas for future service.</p> <p>Needs guidance to self-assess personal service involvement.</p>	<p>Seldom volunteers comments about his/her actions in service or treats the subject as unimportant or irrelevant.</p> <p>Even with support has difficulty self-assessing personal service involvement.</p>

Ladder of inference



Open Space Technology

Listening, Learning, Sharing and Growing



Open Space Technology

- For OST to work, it must focus on a real issue that is of passionate concern to those who will be involved.



Open Space Technology

Stages of Initiation

1. Welcome
2. Focus the Group
3. State the Theme
4. Describe the Process
5. Create the Community Bulletin Board
6. Open the Village Marketplace



Open Space Technology

The Four Principles

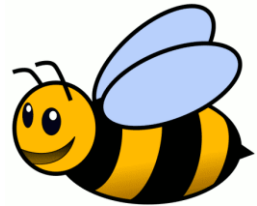
1. The people who come are the right people.
2. Whatever happens is the only thing that could have.
3. Whenever it starts is the right time.
4. When it's over, it's over.



Bumble Bee & Butterfly

If you are not learning or contributing, become a bumblebee or a butterfly

- Bumble bees flit from one meeting to another, pollinating and cross-pollinating.



- Butterflies often never get into any meeting. They may be in the hallway or at the pool where silence may be enjoyed or some new unexplored topic engaged.



Open Space Technology

The Circle is the fundamental geometry of open human communication.

Be prepared to be surprised!



Open Space Technology

Protocols

- Contribute but don't dominate
- Listen with an open mind, open heart, and open will



Open Space Technology

Team Structure

Each team needs a

Host/Lead

Facilitator

Recorder



Open Space Technology

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Board style & structure

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Type 2:	Envisions and shapes organizational direction; thinks strategically; form follows function; organizations as living systems—open systems	Board becomes a strategic asset for the organization; structure and communication organize around strategic priorities vs administrative operations
Type 3:	Noticing cues and clues; choosing and using “frames” for sense making; thinking retrospectively; trustees and executive collaborate	More informed direction-setting; greater use of trustees’ talents; greater ambiguity in board/staff relationships

Governing: “task” or “mode”

	Tasks	Modes/Cognitive Approach
Type I: Fiduciary	Conducting audits, oversight routines to ensure resources are used efficiently	Productively converting organizations resources into assets; deploy assets to achieve goals
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