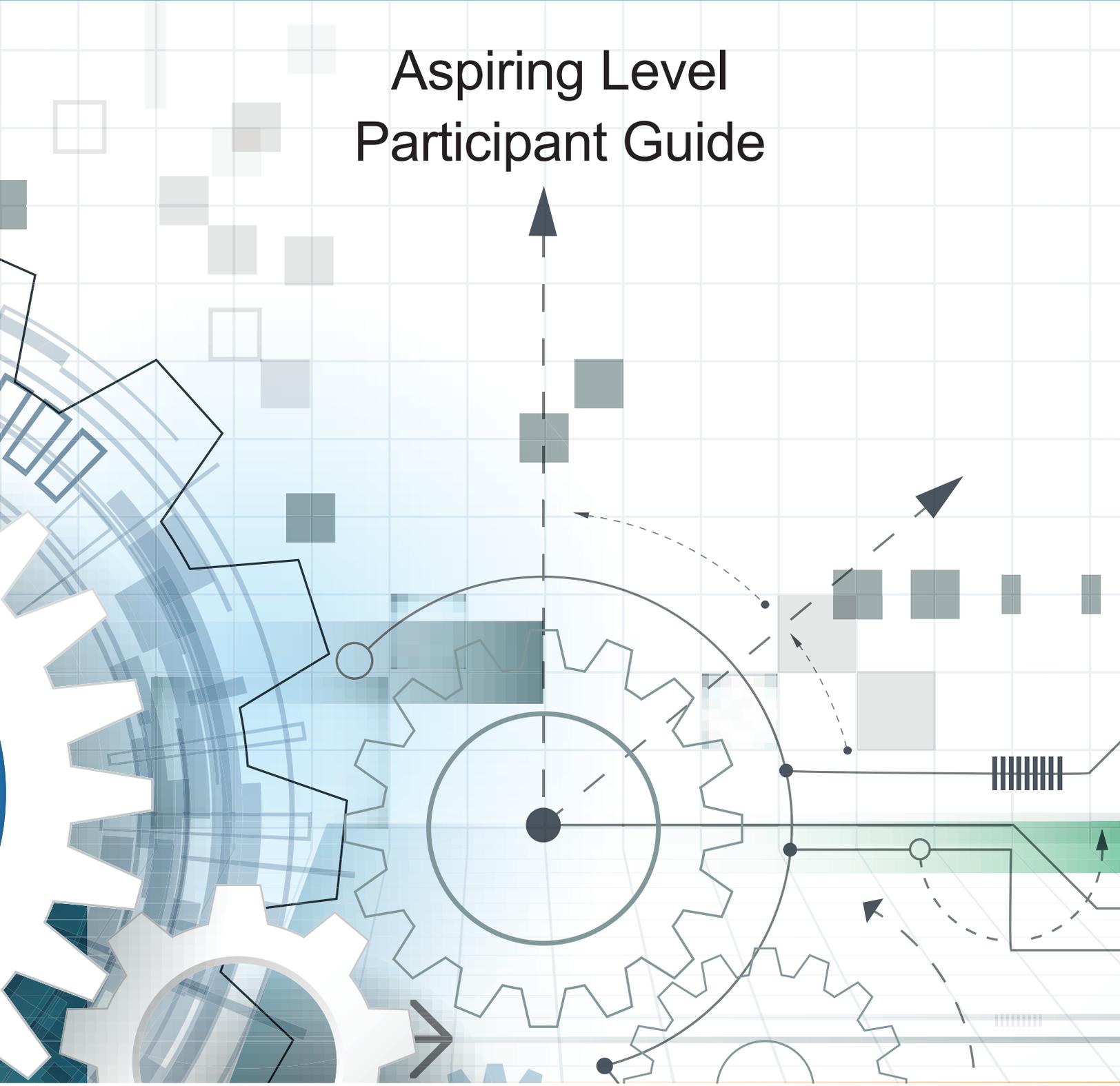


# Missouri Leadership Development System (MLDS)

## Aspiring Level Participant Guide





## **Missouri Leadership Development System (MLDS)**

### **Aspiring Leader Participant Guide**

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# Overview

## The Missouri Leadership Development System (MLDS)

The primary purpose of the Missouri Leadership Development System (MLDS) is the development and support of effective school leaders. Effective school leadership is an essential factor to ensure equitable access to excellent education for all Missouri students.

In the fall 2014, a group of key stakeholders currently engaged in principal development and support were convened by the Department of Elementary and Secondary Education (DESE) to identify the essential competencies of a transformational principal. Transformational principals are effective leaders who work with and through a broad range of stakeholders and contexts to create high quality learning opportunities for students. Transformational principals are leaders who collaborate with others to identify needed changes to enhance student learning. These main competencies of transformational leadership were clustered into 5 categories:

## The Transformational Principal is...



These 5 categories, or domains, summarize the main roles a principal must assume, often times simultaneously, to effectively lead a school that is focused on instruction. Each domain is described through a particular set of competencies.

The competencies, or specific skills necessary in each role, were created and projected across the MLDS Continuum. The MLDS Continuum extends from aspiring, to emerging, to developing and then to transformational. Each level occurs throughout a principal’s career beginning with preparation.

Professional development and support are necessary to ensure a leader’s progression across the continuum indicating their mastery of the competencies at each of the four levels.

The **Principal** as the **Instructional Leader** ensures a guaranteed and viable curriculum.

**Leadership Competency #4**—Engages and supports staff to vertically and horizontally align curriculum to state/district standards (PSEL 4a,b;6d; 9i;10a,e)

Aspiring Leader	Emerging Leader	Developing Leader	Transformational Leader
Understands standards as they apply to horizontal and vertical alignment of local curricula and content areas.	Examines and becomes familiar with the existing curriculum and learning standards.	Facilitates staff discussions to ensure curriculum is comprehensive, rigorous, aligned, and engaging and supports continuity and fidelity across all grades and content areas.	Ensures staff regularly collaborates to continuously monitor and adjust the vertical and horizontal alignment of the curriculum to improve student learning.

The **Distinguished Transformational Leader** coaches, trains and/or mentors others in how to ensure a guaranteed and viable curriculum.

The **Principal** as the **Instructional Leader** ensures a guaranteed and viable curriculum.

**Leadership Competency #5**—Supports staff use of a variety of research-based practices appropriate to the intended content. (PSEL2b; 4b,c,d,e; 10a,f)

Aspiring Leader	Emerging Leader	Developing Leader	Transformational Leader
Understands a variety of research-based instructional practices and how to appropriately match learning content	Identifies existing instructional practices and reinforces those that are appropriate to the learning content	Builds teacher capacity with a variety of instructional practices appropriate to the learning content	Facilitates opportunities for collaboration and modeling of instructional practices appropriate to the learning content

**Leadership Competency #6**—Observes classroom instruction and provides meaningful and timely feedback on teacher practice and student response. (PSEL2b; 4b,d;6a,e,f;10c,e,f)

Understands and engages in meaningful feedback related to effective teacher practice	Observes classroom instruction and provides meaningful and timely feedback to build teacher practice and student response	Observes classroom instruction and provides meaningful and timely feedback to intentionally meet individual teacher strengths and areas for growth	Develops a systemic process for the continuous improvement of all teachers’ instructional practice
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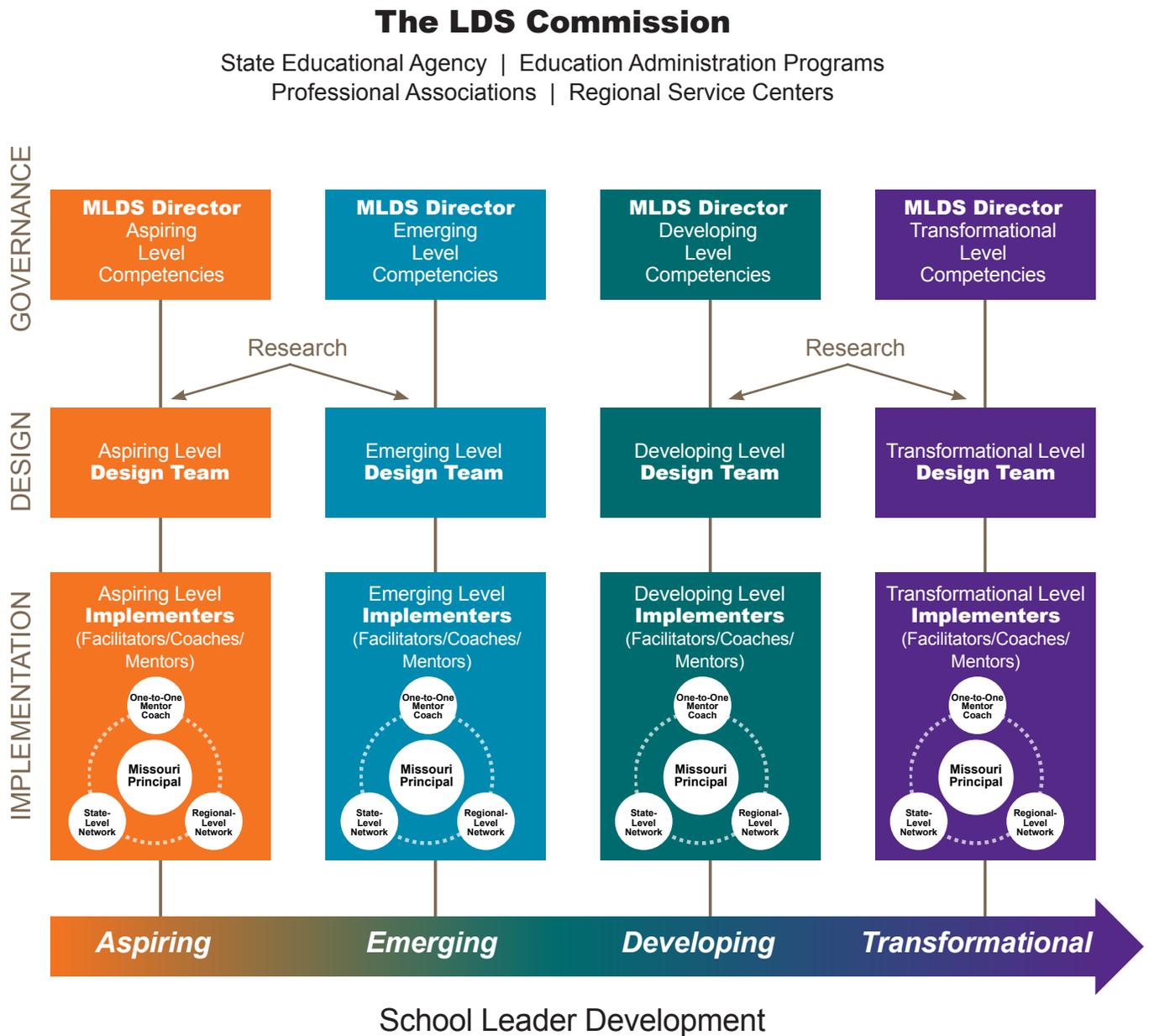
There are approximately 2,200 principals and 1,300 assistant principals currently serving in Missouri schools. In addition, there is an estimated 1,100 that earn an administrator certificate each year. These active and future principals likely have mastery or partial mastery of some of the competencies at the various levels while still needing new learning and additional support to develop mastery in others. This training and support will be necessary in order to achieve the goal of having a transformational principal in every school.

# MLDS Commission, Design Team, Meetings and Members

The MLDS organizational structure is designed to deliver the training and support necessary to ensure Missouri principals master the essential competencies of the MLDS. The key components of this delivery system include:

- Governance
- Design
- Implementation by facilitators, coaches, and mentors

This organizational chart demonstrates the relationship between the various levels of the MLDS:



## Governance

The governance component of the MLDS is responsible for establishing and executing the processes of interaction and decision-making among the key stakeholders involved in training and supporting effective transformational leaders in Missouri's schools. Governance for the MLDS is provided through two separate elements:

- MLDS Commission
- MLDS Directors

The MLDS Commission is a body of 12-15 key stakeholders representing the state agency, education administration programs, professional organizations, practitioners and regional service providers. The state agency (DESE) chairs the commission. The MLDS has the following Mission and Vision:

***The Vision of the LDS is that every school in Missouri will be led by a highly effective principal***

***The Mission of the LDS is to develop highly effective school principals in Missouri by creating a leadership development system to ensure excellent school leadership in service to all students***

The MLDS Commission and MLDS Directors meet quarterly and participate in regular professional development to ensure the competencies of the system remain current and relevant and its implementation efficient and effective. The duties of the MLDS Commission, among others, include the following areas:

- Vision, mission, values and goals that further the main focus of the MLDS and drive the development of action plans, meeting topics, agendas, etc.;
- A Business Plan that includes funding for the system, pricing and negotiation and ongoing investment;
- Human Resources for the system such as generating job descriptions for designers and implementers and selecting and acquiring directors;
- Communication to all key stakeholders about important topics and information like marketing, recruiting, quality, etc.; and
- Succession planning to maintain the integrity of the system and ensure appropriate and necessary representation.

An additional element of governance for the MLDS occurs through individuals who serve as directors for each of the levels. There is one Lead Director who oversees the Emerging Level of the MLDS. The MLDS Directors meet 4-6 times per year. These directors oversee essential functions in each of the 4 levels of the MLDS Continuum:

- Aspiring Level – preparation phase, or pre-service, that results in an administrative certificate
- Emerging Level – the initial years of practice resulting in readiness for the next phase
- Developing Level – the subsequent years of practice after the initial years when leadership skills are further developed and refined resulting in readiness for the next phase
- Transformational Level – the target phase when principals possess the necessary skills and knowledge to lead schools fully responsive to the learning needs of its students
- The Distinguished Transformational Principal – a select percentage of principals of proven effectiveness able to coach, train and mentor other principals through the LDS continuum

The MLDS Directors report to the MLDS Commission on various areas specific to their particular leadership level of development. The specific areas of a level of the MLDS Continuum for which they oversee and are accountable include the following:

- Lead a team of designers in creating learning content, activities and materials specific to a particular level of the system

- Oversee a team of implementers to ensure that quality training and support are provided to all principals on the competencies of that particular level of the system
- Ensure consistency and alignment of training, support and implementation across the four levels of the MLDS Continuum
- Actively participate in the evaluation of processes and outcomes at a particular level of the system to ensure principals are successfully mastering appropriate competencies resulting in effective school leadership
- Regularly provide information to the MLDS Commission regarding the effectiveness of the training and support provided to principals in mastering specific competencies in that particular level of the system

The interdependent work of the MLDS Commission and Directors provide for the efficient and effective management and execution of the MLDS System in service to Missouri principals as they develop, acquire and apply essential leadership knowledge and skills necessary for the success of all students.

## Design

The design phase of the MLDS is responsible for constructing a plan for delivering training and support to principals in their efforts to master the leadership competencies for each level of the MLDS Continuum. The Design team for each level will generally consist of 10-15 individuals tasked with the following:

- Actively participate in facilitator training to effectively deliver the learning experiences contained in this facilitator guide
- Develop training and support materials (e.g. articles/reading material, video, case studies, activities, tasks, tools, etc.) to assist principals in mastering competencies at each particular level
- Prepare those who facilitate, coach, and mentor to train and support principals in a way that ensures the fidelity of the delivery of materials at a particular level of the MLDS Continuum
- Participate in exercises/activities with other designers in the MLDS Continuum to ensure consistency and alignment of principal training and support
- Provide feedback and evaluative information to the MLDS Director for a particular level of the MLDS Continuum

High-quality models from other states and districts were gathered by the professional associations to inform the development of the domains, competencies and continuum of the LDS. Information, tools and other appropriate resources from the Rutherford Learning Group (RLG), the School Administration Manager (SAMs) Project, and other relevant research inform the learning materials that will be created for each of the four levels of the MLDS Continuum. Ongoing research will be conducted to ensure the competencies of the system remain current and relevant and its implementation efficient and effective.

The Emerging Level Design Team for the MLDS worked through a formal process in order to create six separate learning experiences for early career school administrators. A formalized process is an important step as it builds commitment while a product alone simply builds compliance. This formal design process occurred over a span of four months featuring a major work session each month. Additional background and preparation work occurred in between each of the four major work sessions. The Emerging Level Design Team first began with an exercise in capacity mapping which identified the strengths and interests of the design team members. The team next developed a mission, vision and core values. These included the following:

**Mission** – The Missouri Leadership Development System is a comprehensive research- based program which ensures every student in Missouri will attend school with an effective confident leader by developing, supporting and refining the leadership capacity of all Missouri school principals.

**Vision** – Create a comprehensive leadership development system of learning experiences that include comprehensive, relevant and engaging treatments that will serve as a blueprint for developing and supporting transformation school principals.

**Core Values** – Equity (statewide consistency), Fidelity, Sustainability, Relevance, High Quality

## Adult Learning Theory

The Emerging Level Design Team used guiding principles as it developed treatments that would be included in various learning experiences. These guiding principles included:

### Guiding Principle 1: Knowledge, Skills and Attitudes (ksas)

Knowledge, skills and attitudes combine to reflect particular characteristics necessary to do a job effectively.

**K** – knowledge: basic understanding, content

**S** – skills: can do, demonstrate, explain, coach

**A** – attitudes: based on experience, commitment to helping other grow

### Guiding Principle 2: WHY before the WHAT and HOW

A Learning continuum reflects a sequence of skills building from one level of difficulty or complexity to the next. The skills are cumulative meaning current skills are added to skills learned at an earlier level.

**Awareness** – knowledge, the why, basic understanding (THEN)

**Early skill building** – modeling, practice learning, trial and error (THEN)

**Advance skill building** – continuous improvement and reflection (THEN)

**Leadership/Renewal** – Articulate model for others, collaboration

### Learning Continuum



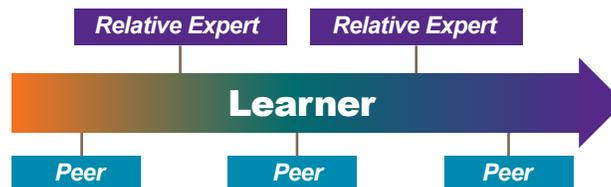
### Guiding Principle 3: Designing for Sustainability

To sustain is to endure or continue. A balance between support and expectations is a necessity for optimal learning to occur. As expectations increase so should support.



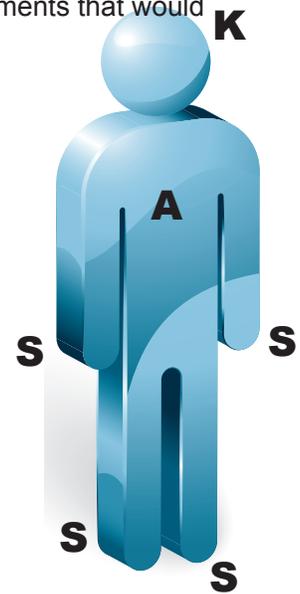
### Guiding Principle 4: Optimal spacing of work with peers, relative experts and established experts

Lev Vygotsky developed the Zone of Proximal Development to describe what a learner can do with help and what they can do without help. This theory is used to optimally determine when learners should interact with peers, relative experts and established experts (Vygotsky, 1980).



The formal process also included clarification of the MLDS competencies. This involved “unpacking” the language of the competencies to determine their specific intent. This was important in order to ensure that treatments and learning experiences appropriately addressed the intent of the competency. The process of unpacking each of the 32 competencies involved special attention regarding:

- Essence of the competency
- Use of Nouns
- Use of Verbs
- Use of Modifiers
- Implications



## Developing Learning Experiences

Once the competencies were unpacked, they were grouped into authentic learning experiences. A learning experience is an interaction or activity in which learning takes place. Within each learning activity are various treatments. These treatments were created to fully develop each of the learning experiences.

The MLDS Design Team next identified various engagement platforms. An engagement platform refers to the means by which the learner is introduced to learning. The engagement platforms included the following:

- Regional Meetings
- Conferences
- Learning Labs
- District Push-In
- One-to-One Mentoring / Coaching
- Retreat
- Online Events
- Twitter Events
- Other Engagement Platforms, tbd.

## Implementation

The implementation component of the MLDS is responsible for putting into effect or executing the training and support developed by the MLDS Designers. Facilitators, coaches and/or mentors (implementers) work directly with Missouri principals to assist them as they work to master the leadership competencies associated with particular levels of the MLDS Continuum. The Implementation team for each level will generally consist of 20-40 individuals tasked with the following:

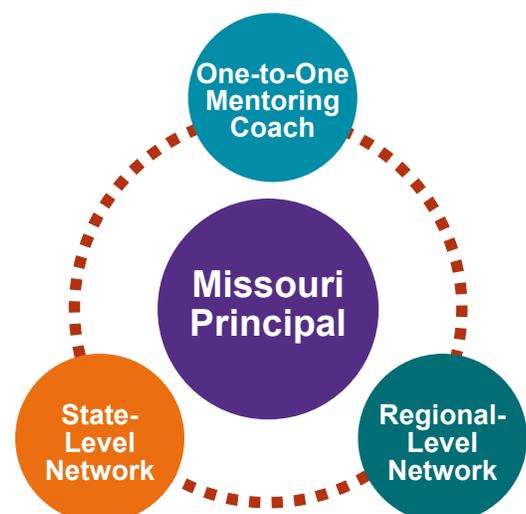
- Providing direct training and support to principals using appropriate learning materials (e.g. printed material/articles, video, case studies, activities, tasks, tools, etc.) which result in principals mastering competencies at each particular level of the continuum
- Delivering training and support that ensures a fidelity of delivery across the MLDS Continuum
- Participating in exercises/activities with other implementers in the MLDS Continuum to ensure consistency and alignment of training and support
- Providing feedback and evaluative information to the MLDS Design team and Director for each particular level of the MLDS Continuum

MLDS Implementation by facilitators, coaches and/or mentors occurs across three separate layers of training and support. These various layers work interdependently to ensure efficient and effective support and development for the principal.

One-to-one mentoring and coaching is provided at the Emerging and Developing Levels. Additional coaching occurs at the Transformational Level. Facilitation of networks with other principals occurs regionally in smaller groups.

Networking also occurs through a series of state meetings where all principals gather and participate in professional development together.

The training, support, mentoring, coaching, regional and state networks provided by the MLDS Implementation Teams result in principals mastering competencies at each level of the MLDS Continuum.



## **Missouri Leadership Development System (MLDS)**

### **Nomenclature, sequence, and structure:**

The thirty-two MLDS transformational level leader competencies are not addressed individually and in sequence. Rather, they are embedded in twelve larger, more authentic, Learning Experiences (LE).

The twelve learning experiences, other than portions of LE 1, Critical Firsts, which specifically address beginning of the year issues, are not presented in a dependent sequence. The twelve LEs are designed to engage administrators across a span of several years in multiple engagement platforms, or venues, such as regional meetings, state conferences, coaching/mentoring sessions, or learning labs. Each LE is comprised of a number of treatments, that represent specific activities and approaches designed to foster mastery of the competencies. The treatments that comprise each of the twelve LEs are presented in the recommended sequence (unless otherwise noted) that best accomplish the aims of the LE.

# Crosswalk: Learning Experiences – MLDS Competencies



## Recognizing and Developing Excellent Instruction

MLDS Competencies		National Educational Leadership Preparation (NELP) Standards
Visionary 3	examines data to evaluate mission	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Instructional 4	examines existing curriculum	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Instructional 5	identifies existing instructional practices	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Instructional 6	conducts observations and gives feedback	1.1-2; 2.1; 2.3; 3.1-3; 4.1-4; 5.1-2; 6.1-2; 7.1-4
Instructional 7	assesses use of assessments	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1; 6.1; 6.3; 7.1-4
Instructional 8	assess teacher use of data	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Instructional 9	uses data for professional learning	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Managerial 12	analyzes personnel strengths & weaknesses	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Innovative 26	gathers knowledge, skills and best practices	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Innovative 31	acts to promote student learning	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
Innovative 32	considers change promoting student learning	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4



## Understanding Self and Others

Visionary 1	examines existing core values and culture	1.1-2; 2.1; 3.1; 4.2; 4.4; 5.1-3; 7.1-2; 7.4
Visionary 2	examines communication of vision/mission	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Visionary 3	examines data to evaluate mission	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Instructional 9	uses data for professional learning	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Managerial 11	routines, procedures, schedules	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Relational 18	analyzes diversity of the school	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Relational 20	positive relationships with students	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1; 7.3-4
Relational 21	positive relationships with staff	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
Relational 22	analyzes culture of support/respect	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Relational 23	Identifies potential teacher leaders	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
Relational 24	positive relationships with families	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Relational 25	positive relationships with community	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
Innovative 27	engages in professional networks	1.2, 2.1
Innovative 28	reflects on leadership experiences	1.1-2; 2.1; 2.3; 3.1-3; 4.1-4; 5.1-2; 6.1-2; 7.1-4
Innovative 29	receptive to feedback	1.1-2; 2.1; 2.3; 3.1; 4.1-2; 4.4; 5.1-2; 7.1-2; 7.4
Innovative 30	applies time management practices	2.1

## Crosswalk: Learning Experiences – MLDS Competencies

	MLDS Competencies	National Educational Leadership Preparation (NELP) Standards	
<b>LE 4</b> A Primer on Decision Making	Visionary 1	examines existing core values and culture	1.1-2; 2.1; 3.1; 4.2; 4.4; 5.1-3; 7.1-2; 7.4
	Visionary 3	examines data to evaluate mission	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Instructional 9	uses data for professional learning	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
	Managerial 10	safe and functional school	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
	Managerial 11	routines, procedures, schedules	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
	Managerial 12	analyze personnel strengths and needs	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Managerial 14	Use data to determine interventions/support	1.2; 2.1; 2.3; 3.2-3; 4.2-4; 5.1-2; 6.1-2; 7.1-4
	Relational 18	analyzes diversity of the school	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
	Relational 19	resources support student well-being	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Innovative 26	gathers knowledge, skills and best practices	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Innovative 28	reflects on leadership experiences	1.1-2; 2.1; 2.3; 3.1-3; 4.1-4; 5.1-2; 6.1-2; 7.1-4
	Innovative 31	acts to promote student learning	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
Innovative 32	Considers change promoting student learning	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4	
<b>LE 5</b> Reading and Shaping School Culture	Visionary 1	examines existing core values and culture	1.1-2; 2.1; 3.1; 4.2; 4.4; 5.1-3; 7.1-2; 7.4
	Visionary 2	examines communication of vision/mission	1.1-2; 2.1; 2.3; 3.1-3; 4.2-4; 5.1-3; 6.1-2; 7.1; 7.3-4
	Visionary 3	examines data to evaluate mission	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Instructional 5	identifies existing instructional practices	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Instructional 9	uses data for professional learning	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
	Managerial 12	analyzes personnel strengths & weaknesses	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1-4
	Managerial 14	Use data to determine interventions/support	1.2; 2.1; 2.3; 3.2-3; 4.2-4; 5.1-2; 6.1-2; 7.1-4
	Relational 20	positive relationships with students	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-2; 6.1-3; 7.1; 7.3-4
	Relational 21	positive relationships with staff	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
	Relational 22	analyzes culture of support/respect	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4
	Innovative 31	acts to promote student learning	1.2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1; 7.3
	Innovative 32	Considers change promoting student learning	1.1-2; 2.1-3; 3.1-3; 4.1-4; 5.1-3; 6.1-3; 7.1-4 i

# Missouri Leadership Development System (MLDS)



## Aspiring Level Learning Experience 2:

Recognizing and developing excellent instruction: How successful school leaders cultivate strong instructional practices and develop an emphasis on skillful teaching through observation and feedback.

### Introduction and Rationale:

Stephen Fink in his study *School and District Leaders as Instructional Experts: What We Are Learning* (2012) noted that

*“The quality of teaching is the most important variable improving their instructional practice.”*

An administrator’s first essential step toward improving teaching is her ability to see, notice, and observe; in other words, to recognize excellent teaching. Dictionary.com provides these definitions of recognize: rek-uh g-nahyz (verb)

1. to identify as something or someone previously seen or known
2. to identify from knowledge of appearance or characteristics
3. to perceive as existing or true

When school leaders recognize excellent instruction, they are not seeing it for the first time. Rather, they are identifying episodes of excellent teaching by comparing them to what they have seen, learned, and experienced before. The act of recognizing, then, involves two parts. First the observer must have acquired and organized a knowledge/experience base that can be quickly and accurately accessed.

Then, the observer must have the processing ability to interpret, in real time, what is being observed in light of the observer’s knowledge base. That’s Step 1: Acquire and organize a knowledge base about instruction; then Step 2: Use the knowledge base to filter current reality for what’s most important toward improvement.

One of the key differences between how experts and novices observe differently is that experts tend to notice meaningful patterns in the contextual field where novices tend to notice less connected

details (Bransford, Brown, & Cocking, 2000). A casual observer looks up at the sky and sees clouds. A meteorologist sees patterns of cloud types that have meaning for forecasting weather.

*In How People Learn- Brain, Mind, Experience, and School* (Bransford et al., 2000) the authors note

Research shows that it is not simply general abilities, such as memory or intelligence, nor the use of general strategies that differentiate experts from novices. Instead, experts have acquired extensive knowledge that affects what they notice and how they organize, represent, and interpret information in their environment. This, in turn, affects their abilities to remember, reason, and solve problems. (p. 31)

As a school leader becomes more and more capable of recognizing excellent instruction, the next, complementary step is to be able to skillfully communicate that which is observed back to teachers in a manner that encourages growth and improvement (Costa and Garmston, 1994). Providing growth-evoking feedback and coaching to teachers is central to the role of school administrators, indeed to all management positions inside or outside education. Waldroop and Butler (1996) note “the goal of [feedback and] coaching is the goal of good management: to make the most of an organization’s valuable resources.” The awareness of how important feedback and coaching is for teachers increased

significantly when researchers Joyce and Showers (1988) showed that skillful feedback and coaching can dramatically increase teachers' application of new skills vs. staff development alone, that does not include a coaching component. The expectation that school administrators be instructional leaders in addition to their role as enterprise manager is now mainstream. Feedback and coaching skills are recognized as key components of that role. (Steiner and Kowal, 2007).

For emerging Missouri school administrators, the logic model is solid:

- A. Instructional quality is the prime mover of student achievement.
- B. Skillful administrators can learn to recognize patterns of excellent instruction.
- C. Adult learners can learn, grow, and develop substantially.
- D. Teachers apply new skills best when skillful feedback and coaching is employed.
- E. Administrators can improve their feedback and coaching skills through practice.

The learning experience, Recognizing and developing excellent instruction, seeks to develop aspiring administrators' abilities to:

- A. Observe classroom instruction actively and skillfully.
- B. Recognize and name specific patterns of excellent instruction using a common, professional language.

## MLDS Engagement Platforms and Treatments for LE 2

Recognizing and developing excellent instruction: How successful school leaders cultivate strong instructional practices and develop an emphasis on skillful teaching through observation and feedback

### Treatment 1: Understanding Effective Instruction

(approximate time allotment: 90 minutes)

**Engagement Platform:** Class activity

#### **Facilitation Notes:**

*Instructor should provide / suggest a variety of resources for students to review effective teaching practices*

#### **References:**

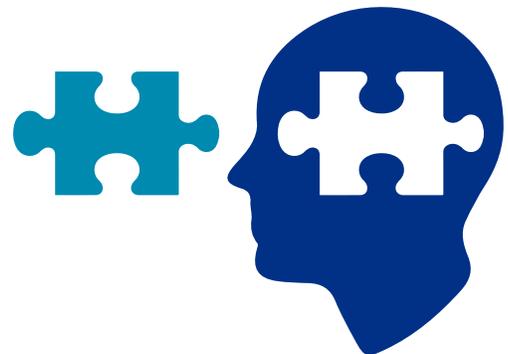
<https://www.edutopia.org/blog/5-highly-effective-teaching-practices-rebecca-alber>

<http://www.teachingworks.org/work-of-teaching/high-leverage-practices>

<http://www.nea.org/tools/52217.htm>

*(From the introduction/rationale...) When school leaders recognize excellent instruction, they are not, by definition, seeing it for the first time. Rather, they are identifying episodes of excellent teaching by comparing them to what they've seen, learned, and experienced before. The act of recognizing, then, involves two parts. First the observer must have acquired and organized a knowledge/experience base that can be quickly and accurately accessed. Then, the observer must have the processing ability to interpret, in real time, what is being observed in light of the observer's knowledge base.*

*That's Step 1: Acquire and organize a knowledge base about instruction; then Step 2: Use the knowledge base to filter current reality for what's most important toward improvement.*

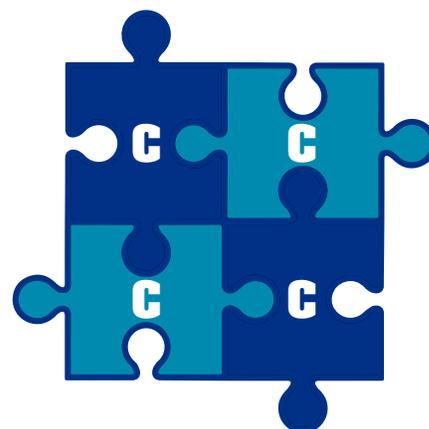


It is imperative that aspiring leaders establish a structural awareness (i.e. terminology and definitions) that enables tangible expansion (i.e. growth and improvement that can be named and defined, and allowed to evolve). This is consistent with the two part process of recognition as described above and is, in this sense, cyclical, continually demanding a higher level (and usually more complex) organization of one's knowledge base.

### Exercise:

After reviewing the referenced web pages above, gather in small groups of 3-5.

1. Discuss effective instruction, including examples from personal experience. Discuss and define evidence based instruction and recall examples of high leverage practices you have utilized or observed.
2. Discuss the advantages of an ever-expanding knowledge base and the organizational difficulties it may create.
3. The Four C's, as presented in the third reference link above, have been identified as skills necessary for 21st century learning, to be integrated into classrooms across all subject areas and grade levels. Though presented as skills to be taught, critical thinking, communication, collaboration, and creativity can also serve as a beginning framework for strong instructional practices, helping us to practice what we teach. In your group, list the Four C's across the top of a piece of paper, then look at 15 to 20 teaching practices from the references above and/or from personal experience, and find the best fit for each one within the Four C's. Upon completion, discuss within the larger group. Now look at your list of teaching practices and choose one practice from each C and examine its viability across multiple subject areas and grade levels; (if possible, choose successful practices from personal experience in a specific setting and consider the critical attributes that made the first application successful – transfer those attributes to a new setting). Discuss at length.
4. A possible follow up to the above experience would be to have students complete a close read on one of the other articles found in the links above. Have students discuss their thoughts about how these articles relate to the Four C's and their recent discussion.
5. Another follow up is to have students bring in resources they have used in their teaching and professional learning that demonstrate effective instruction. It might be a handbook on Lucy Calkins, Kagan strategies for engagement, Robert Marzano's nine high yield instructional strategies, John Hattie's strategies for maximizing student learning or others.
6. At the end of their study on effective instruction, student should write a reflection of their own professional growth regarding high leverage strategies based on this reading and class discussions.



### Treatment 2: Getting Comfortable with Observations

(Time Allotment: 60 minutes)

**Engagement Platform:** Class activity Facilitation Notes:

This learning experience may span over two or three class periods as students find time to conduct observations. Reflection on experiences should occur in class post-observations.

### References:

Teaching Channel Video: <https://www.teachingchannel.org/video/the-learning-walk>  
RLG 7 Principles of Active Observation



## Exercise:

1. Discuss the notion of observing others' classrooms. What's comfortable and not comfortable about that? What is your experience? Discuss any experiences that were not comfortable and how things could have been done differently. Discuss positive, helpful experiences. <https://www.teachingchannel.org/video/the-learning-walk> (watch video and discuss)
2. Teach two of the 7 Principles of Active Observation (RLG) – number 4 (enter as a visitor, not an owner) and number 6 (observe both field and ground). Do a close read and discuss.
3. Discuss how you will gain permission to visit others' classrooms by sending a note or verbally asking a teacher if you can visit. Let the teacher know that the purpose of your visit is to learn about instructional leadership and you would like the opportunity to visit as many classrooms as possible to see how different teachers teach.
4. Knowing that no lesson is perfect, it is often easier to spot what is not working than it is to pick up on what is working. Consider and discuss how you might transform constructive criticism into a higher level self-appraisal that encourages you to utilize practices that are working and inspire you to improve upon already-strong instructional practice. How might you share this personal inspiration with those that you are observing?
5. Have students develop a timeline about when and how they will visit (on plan period, before or after school, release time, etc.)



## Treatment 3: Visiting Classrooms

(Time Allotment: 2-3 weeks)

**Engagement Platform:** Field Experience

### **Facilitation Notes:**

*Reflection on experiences should occur in class post-observations.*

### **References:**

*Teaching Channel Video: <https://www.teachingchannel.org/video/the-learning-walk>*

*RLG 7 Principles of Active Observation Treatment Description:*



1. Introduce the concept of “cause and effect” by watching videos samples of teaching and brainstorming several specific actions of the teacher and the cause of his/her action. For example, notice when the teacher has students write their answers on dry erase boards, what does that do for the engagement and energy level of the class? When the teacher asks the students to share their predictions with their partner, what is the effect on students? Do several rounds of practice of “cause and effect.”
2. Actually gain permission to visit classrooms as discussed in class.
3. Visit at least 5-7 classrooms of different subject areas and grade levels. If possible try to get out of your building and visit other schools. Ask the administrator for the names of successful teachers who employ effective techniques for you to visit.



4. Try to visit at least some of the classrooms with a lead teacher, an instructional coach or an administrator. Have some discussion afterward about what you saw. If possible, ask the teacher to tell you about the teaching and learning that were occurring while you were there. If possible ask an administrator how they balance their management responsibilities with their obligation to enhance and improve instructional practice? How do they manage their time for each area? How do they come across as a helpful colleague vs. a manager or administrator?
5. As you visit, try to see beyond the content and grade level and focus on effective strategies.
6. As you leave let the teacher know how much you appreciated being able to visit. Leave him/her with something you noticed that was positive for students.
7. As a reaction, write a reflection after your visits that helps you think about the following:
  - a. What were some positive techniques you saw employed and how did that impact the students' engagement and learning?
  - b. Is there anything you saw that was new to you, and effective that you could use in your own teaching?
  - c. How did you feel as an observer in that classroom? Were you comfortable walking around and watching the teaching and learning? What could you do to make it more comfortable?
  - d. How do you think the teacher felt and how do you relate to that?
8. Discuss reflections in class activity with feedback from instructor.

# Missouri Leadership Development System (MLDS)



## Aspiring Level Learning Experience 3:

**Understanding Self and Others: How successful administrators cultivate self-knowledge and customer focus to create success for all stakeholders.**

### Introduction and Rationale:

Of all the traits that quickly come to mind when one imagines a particularly successful leader...courage, vision, commitment, integrity, service- rarely do we place on the A list the trait of honest self-awareness. An insatiable curiosity about the nature of those one purports to lead, likewise, does not make the top ten. These two leadership attributes, however, are directly and tightly linked to success in all enterprises, inside and outside education. The degree to which a school administrator knows well both self and others is the degree to which the administrator is able to design and act for success- both personal and organizational.



In their work *Heart, Smarts, Guts, and Luck* (Tjan, Harrington, and Hsieh, 2012) Tjan states “In my experience — and in the research my co-authors and I did for our book, *Heart, Smarts, Guts, and Luck* — there is one quality that trumps all, evident in virtually every great entrepreneur, manager, and leader. That quality is self-awareness. The best thing leaders can do to improve their effectiveness is to become more aware of what motivates them and their decision-making.”

In his work *Emotional Intelligence* (1995) and *Working with Emotional Intelligence* (1998) Daniel Goleman defines Self-Awareness as “Knowing one’s internal states, preferences, resources, and intuitions.” He goes on to say (in *Working with Emotional Intelligence*) that “Feelings give the essential reading. If there is a discrepancy between action and value, the result will be uneasiness in the form of guilt or shame, deep doubts or nagging second thoughts, queasiness or remorse, and the like.”

A logical complement to self-knowledge is the leader’s knowledge of others, customers and coworkers. The best in the business not only study their customers, they have a persistent curiosity and keen fascination with all aspects of their customers’ habits, motivations, home life, relationships, fears, goals, and preferences.

A focus on understanding self and others is the basis for creating a culture of trust (Hurley, 2006). When school administrators spend a great amount of time and energy learning about and studying others, they are rightly perceived as being other-focused, rather than purely self- focused (Russell, 2013). The often quoted observation by former president Teddy Roosevelt “Nobody cares how much you know, until they know how much you care” rings especially true for school administrators. Andrew (2015) explains “When people know how much you care, you have begun building the foundations of trust-based relationships. In business, developing and sustaining relationships based on trust puts you on the track to success, as relationships, particularly trust-based relationships, equal success” (para. 2).

One of the keys of being a successful leader is the ability to build and develop relationships of trust with pertinent stakeholders (Covey, 2006). From the students you serve to the colleagues with whom you collaborate and the community members with whom you engage, creating and sustaining relationships is essential

The learning experience Understanding Self and Others builds administrators' abilities to:

- A. Develop a deeper and more nuanced understanding of self, including one's motivations, talents, weaknesses, preferences, personality, values, purpose, temperament, and tendencies.
- B. Discern how the complementary elements of mission, vision, and core values can create clarity of purpose for self and school.
- C. Use capacity mapping to build awareness of the unique and valuable skills and abilities possessed by the current faculty and staff.
- D. Develop a deeper understanding of students by connecting their school and home contexts.
- E. Build and sustain positive, trusting relationships with stakeholders and stakeholder groups.

## MLDS Engagement Platforms and Treatments for LE 3

Understanding Self and Others: How successful administrators cultivate self- knowledge and customer focus to create success for all stakeholders.

### Treatment 1: Why Am I an Educator: My Mission, My Vision, My Values

(approximate time allotment: 120 minutes)

**Engagement Platforms:** Class activity

References: <https://www.youtube.com/watch?v=IPYeClTXpxw>

Treatment Description:

1. Ask students to think about why they have chosen education as a career. Further, invite them to think about why they are contemplating educational leadership. Start with writing as many answers to these questions on post-it notes. After 10 minutes of reflecting and making notes on post-its, have students sort their answers between educator and educational leader, and then place their post-its on a wall together, with an inner circle for educator and an outer circle for educational leader. What are the trends? What are the categories within each grouping? What are the categories that are common to both groupings? What are common reasons students in this class choose education? Why Educational Leadership?
2. Without consulting resources briefly define mission, vision and values, and talk about the differences between them and how they might drive our actions: (limit this exercise to 5 to 10 minutes).
3. Now watch Simon Sinek's video called Find Your "Why." <https://www.youtube.com/watch?v=IPYeClTXpxw>. Continue your previous discussion from #2 above, now connecting Simon's thoughts to mission, vision and values. (\*Note: Treatment 2 in Self and Others in the Emerging Level Participant Guide connects Why to Mission, What to Vision, and How to Values.) Note that Simon orders them Why-How-What in his 'Circles' representation, most likely because he is referencing marketing; if a student notes this, discuss it.
4. Have each student take a piece of paper and at the top write a one sentence summary of their Mission or Why, and a one sentence summary of their Vision or What. Now have each student examine their statements and decide if their 'Why' and 'What' are more consistent with their current role as an educator or their aspiration to become a leader. There is no right or wrong. Discuss how one's mission and vision may evolve according to aspiration.



5. Have the students make three columns beneath their Mission and Vision statements. Label the first column Values, and have them list the things that they value. Ask them to think about where those values may have derived from and write that in parentheses. Ask students to share out or share in pairs what they wrote, if they are willing. If appropriate, briefly discuss Belief and its importance in the formulation of mission, vision and values, but maintain focus on definitions and practical application of mission, vision and values.
6. Students should label the second column actions and draw arrows from each value to the next column where they will write an action that is consistent with that value; preferably an example of recent personal behavior. Again, students should share their thinking in small groups or with the whole group.
7. Students should label the third column Capacity. Capacity is defined as Experiences, Abilities, Talents, Skills, Interests, Passions (EAT-SIP). Read and take 4 or 5 minutes to consider the paragraph below:
  - a. Do you have a tendency to tackle problems or resolve issues by immediately using methods that have worked for you before? (i.e. relying on your strengths?) Think objectively about how you usually handle challenge and you will discover something about yourself. Think about someone else you know who tackles problems differently, in a way that would take you out of your comfort zone. Now think back and mentally apply their method to a recent issue you resolved, and consider how their method may have contributed to your resolution. It is important to know one's strengths and it is important to recognize and (when appropriate) adopt the strengths of others.
8. Now list a personal strength in the capacity column and draw an arrow from a recent action to one or more strengths that influenced that action. Given enough time list some potential strengths (or strengths of others) that could further strengthen your actions and are still consistent with your mission, vision and values.
9. The final step is where students reflect on other recent actions not listed, and consider if they are consistent with their beliefs and values? Do we have "internal consistency" when it comes to our day to day behavior professionally and personally. In other words, if you value respect, how do we treat students and families at school? Reflections can be oral or in writing.

## Treatment 2: Who Do I Choose to Surround Me?

(Time Allotment: 90 minutes)

**Engagement Platform:** Class activity

**References:** <https://www.cultofpedagogy.com/marigolds/> <https://www.edweek.org/tm/articles/2014/12/31/3-steps-for-building-a-professional-learning.html>



Treatment Description:

1. Have students trace their journey of people throughout their lives who have influenced them in a positive way. Think about the characteristics of those individuals and why and how they have impacted their lives and their personal and professional trajectory. Discuss how this helps us understand ourselves and our purpose. Talk about the difference in people who have influenced us in a positive and a negative way. Do some of those influencers also serve as role-models and mentors?
2. Read this article about professional learning networks (PLN). Debrief and talk about what that means to you. Draw a model of your professional learning network and do a gallery walk to share with classmates.



<https://www.edweek.org/tm/articles/2014/12/31/3-steps-for-building-a-professional-learning.html>

3. Go back to your “influencers” and see how many landed in your current PLN. Talk about that.
4. Read <https://www.cultofpedagogy.com/marigolds/> and discuss “The Marigold Effect” and how we have been impacted by people around us.
5. Write a letter to someone who has impacted you in a positive way.

### **Treatment 3: Seeing the Context by Shifting**

**Perspectives** (Time Allotment: 30 minutes)

**Engagement Platform:** Class activity

*References:* [www.worldometers.info/world-population/](http://www.worldometers.info/world-population/)

Treatment Description:

1. To understand self and others it is important to understand context. Context is the set of circumstances that surround a particular individual, and by definition, context influences meaning. As an example, a college degree is a college degree, yet we often attribute a greater depth of meaning to that degree when an individual has overcome considerable adversity to earn it. Take a few minutes to seriously think about your personal context: where you came from; where you are now; where you plan to be as “now” carries you forward. Jot down some notes and, if willing, share in pairs or with the class.
2. In #1 above, odds are you considered your personal context from your personal perspective. Now to gain insight into how context can influence meaning, go to [www.worldometers.info/world-population/](http://www.worldometers.info/world-population/) and think again about your personal context against the backdrop of this larger context that consists of (in this moment) 7,666,751,115 other personal contexts.
3. Of course you don’t have to leap this far to see the multiple layers of context that add nuance and depth to understanding self and others. Simply think of a recent accomplishment and extend the perspective from (for example) the classroom to the school to the district to the state... And then from the classroom to your family to your friends to your extended family to your neighbors...
4. By consistently practicing this shift in perspectives, we will become more open to understanding both self and others.

### **Treatment 4: Who Am I**

(Time Allotment: 30 minutes)

**Engagement Platform:** Class activity

*References:* <https://www.speak-first.com/which-animal-are-you/>

Treatment Description:

1. There are lots of different personality tests or surveys you can take that tell you a little more about yourself. Myers-Briggs, True Colors, DISC assessment to name a few, are lengthy inventories that ultimately give us our strengths or our tendencies when it comes to our relationships, communication styles and other. Have students talk about any experiences they have had in taking these inventories and what were the results. What did those tests teach students about themselves?
2. Ask students to go online and take The Animal Quiz. This is a brief inventory that can be done in about 10 minutes. After students get their results, have them talk about their animals. What does this tell you about yourself that you already knew? What does it tell you that you knew but were trying to forget? How can this help you relate to others? What else can this do for you?





## Missouri Leadership Development System (MLDS)

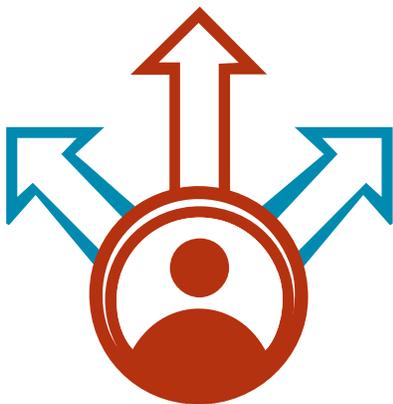
### Aspiring Level Learning Experience 4:

A primer on decision making for new school administrators: How to get things done, empower others, and make the right call on tough issues.

*Facilitation Guide: Facilitator notes are inserted near the corresponding section of the participant guide.*

*Facilitation Note: With all four of the Aspiring Level Learning Experiences, the Introduction and Rationale section can be used in multiple ways as a resource. Facilitators could use the section as a warm up activity, as a “read ahead,” as the basis for a Socratic seminar, to support small or large group discussions, or as a review/closure activity, to list just a few possibilities.*

#### Introduction and Rationale:



School administrators are asked daily to make hundreds of decisions. Some are simple, some are complex, and some are seemingly impossible - all are important. If the sheer number of important decisions to be made were not challenging enough, administrator decision making is made more complex by a number of cultural and contextual factors.

Communities and the schools that serve them are increasingly more diverse. In addition to demographic distinctions and implications, schools must also address a growing diversity of individual student needs. Expectations for the statistical performance of schools is higher and more visible. And, the political structures that govern and fund schools are increasingly polarized (Shapiro & Stefkovich, 2016).

Since one of the fundamental purposes of public schooling is to prepare the citizenry to participate in a democratic society, it falls on schools to pattern their decision making after democratic principles. School leaders are not merely making management decisions, they are at the same time expected to model participative, democratic governance (Fullan, 2005).

School leaders have, by virtue of their official position, a good deal of power over valuable, and often scarce, resources. Administrators routinely make decisions about things that impact the quality of other's work lives - budgets, room assignments, committee responsibilities, supervision duties, and planning periods, etc. With power over resources comes a responsibility to exercise that power in an ethical and moral manner with both integrity and transparency, (Fullan, 2005, Strike, Haller & Soltis, 2005). In his work, *Paradigms and Promises: New Approaches to Educational Administration*, Foster (1986) writes “Each administrative decision carries with it a restructuring of human life. That is why administration at its heart is the resolution of moral dilemmas.”

Each administrative decision contains in it a natural duality. Not only must school leaders make decisions that are rational and technically competent, but also must consider the symbolic, sometimes irrational, impact of the decision on others' perceptions and the school's culture (Deal & Peterson, 1994, 2009).

The learning experience: **A primer on decision making for new school administrators** seeks to:

- A. Develop a clear-eyed understanding by administrators of the importance and potential pitfalls of leadership decisions.
- B. Engage school administrators in an array of learning designs that will build their awareness and basic skills in administrative decision making.
- C. Provide practice and feedback toward initial mastery in the areas of participative decision making, empowerment of others, avoiding unintended consequences, and ethical/moral decision making.

## MLDS Engagement Platforms and Treatments for LE 4

A Primer on Decision-Making for new school administrators: How to get things done, empower others, and make the right call on tough issues.

### Treatment 1: The Process

(Approximate Time Allotment: 60 minutes)

**Engagement Platform:** Class Activity

**Facilitator Notes:** *When one steps into the role of school administrator, decision making is all of a sudden a very different experience than anything many new administrators have ever practiced. Rather than making a decision for 20 or 25 students, one is making decisions that impact the entire school community, decisions that impact climate and culture, students, teachers, support staff, parents, community and often the entire school district. This treatment is an exercise to raise awareness in aspiring leaders about decision-making components. Through this exercise, participants will understand there are common steps in making decisions and different steps are more or less important, depending on the decision that is being made. Participants will also discuss the impact decisions have on different stakeholders and how the impact of one decision may vary widely from stakeholder to stakeholder.*

A common framework for the decision making process often includes the following steps:



(The steps above are from: <https://www.umassd.edu/fycm/decision-making/process/>)

**Exercise:** Identify those decision making process steps from above that are illustrated in this video clip: <https://www.youtube.com/watch?v=pbBS8sHrDgA&feature=youtu.be>.

Now identify those decision making process steps from above that are illustrated in a typical school environment. One example might be the following:

You have been contacted by some parents about some confusion over the new math curriculum. Several teachers have asked that the school host a curriculum night to highlight the new curriculum. They would like to invite parents and students to experience some of the new math activities to help parents understand some of the approaches to teaching students problem-solving. Other teachers in the building do not wish to attend “one more evening activity.” It would be difficult to have some grade levels represented by teachers and some not represented. Identify those decision making process steps in which you would engage to determine what to do.



In small groups of 3 to 5, look at the list above and discuss the following:

- When you identify a decision do you ever include possible alternatives as part of the definition before you gather information? If so, how might this influence gathering information and each of the other steps?
- In which of the process steps above do you feel you cut corners?
- Are there any steps in which you feel you over-analyze or spend too much time with?
- Why is it important to identify more than two alternatives? Is there an ideal number of alternatives you should strive to identify?
- How do you typically weigh the evidence?
- Think of the stakeholders who are impacted by the decision you make?
- When reviewing the consequences of decisions, would it be beneficial to keep a scorecard on how the decision impacted different stakeholders (on a spectrum from constructive to disastrous)?
- Think of examples of a decision and rate the consequences or impact for various stakeholders (i.e. students, parents, teachers, support staff, etc.)

**Exercise:** In your small groups, or in the larger group, take 5 minutes to brainstorm and list different types of decisions; (for example – routine, strategic, personal, group, etc.). Don't overthink and don't limit your thinking. It is okay that many of these types will overlap. Now look at the types of decisions on your list and as a group circle those that you believe would benefit from the scrutiny of scorekeeping, and draw a single line through those that you believe would not benefit from scorekeeping due to diminishing returns. You just practiced a form of consensus decision making. As a group, draw some conclusions from your list.

## **Treatment 2: The Imponderable**

(Approximate Time Allotment: 60 minutes)

### **Engagement Platform: Class Activity**



Imponderable: that which cannot be precisely determined, measured, or evaluated. This definition perfectly describes the potential consequences of a decision. It is impossible to adequately foresee all possible outcomes. This lack of prescience is due to a complexity of contributing factors including the dual nature of many decisions and your individual nature as you struggle with choices that are not obvious or straightforward.

In treatment #1 we established a foundation for understanding the process of decision making. The purpose of this treatment is to introduce a simplified version of the complexity you will encounter in new leadership roles. Duality is a nicely packaged concept that will aid us in this simplification through a practiced awareness of the messiness

of decision making and the unpredictability of outcomes; but as implied, the process is actually much messier than presented below.

### **Exercise:**

An example of our ongoing attempts to simplify and understand is the exaggerated claim of right-brain left-brain duality, (nicely explained in article #2 linked below). To this day though you will find numerous citations that appear to legitimize this concept of duality, (as in article #3 linked below). Article #3 is presented as an example of the persistence of this myth. For an adequate understanding of this simplified introduction to the imponderable world of decision making, read article #1 and/or #2; you may skim the remaining information.

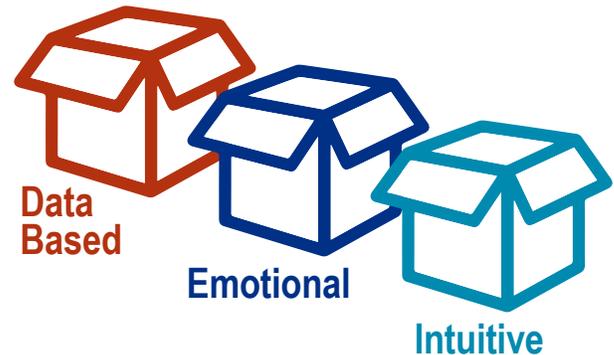


1. <https://www.funderstanding.com/brain/decision-making-and-right-brain-left-brain/>.
2. <https://www.medicalnewstoday.com/articles/321037.php>
3. <https://www.forbes.com/sites/piasilva/2018/05/02/is-the-ideal-entrepreneur-right-brain-or-left-brain/#6a010e4d53df>

As stated in article #1, when faced with distractions such as difficulties, frustration, questionable or hard-to-decipher information, and even mood and circumstance, studies show that we may rely more on an emotional gut-reaction, than on controlled, rational decision making skills; this specific information hints at the complexity to come. In your small groups share or come up with recent examples of 1) a straightforward (but important), rational decision; 2) a messy emotional decision; and 3) a decision with a surprising outcome. Discuss how the outcomes may have changed with the addition or subtraction of emotion or reason.

In his book *The Challenge Culture: Why the Most Successful Organizations Run on Pushback*, Nigel Travis encapsulates a slightly more advanced evolution of our thoughts on thoughts when he says:

“I tend to put them into three boxes or categories: data-based, emotional, and intuitive. The data-based response is quantitative in nature, relying on facts and figures, references, and specific cases to make a point. The emotional contribution comes from the heart and the soul; these are expressions of how one feels about an issue or situation. The intuitive input is really a synthesis of the quantitative and qualitative, a sort of informed instinct.”



The article linked below extends the thoughts above to clearly state that “instead of two separate systems, recent research suggests they are in fact inextricably linked and effectively harnessing the emotional and intuitive aspects of a decision can lead to better outcomes.”

- Read the complete article referenced above – (<https://www.kiddyandpartners.com/insight/emotional-vs-rational-decision-making/>) and then, in the large group, (knowing now that it is too simplistic, but helpful as an introduction), list in two columns synonymous characteristics beneath each heading, Rational and Emotional. If you need to jump-start your thinking, go here: <http://thepeakperformancecenter.com/educational-learning/learning/preferences/the-brain/left-brain-and-right-brain/>
- Discuss (and share examples of) how these characteristics are “inextricably linked”.
- Is it advantageous to work toward a reasoned justification of your emotion? (In other words) will a well-defined emotional characteristic lead to better results than an ill-defined or messy one? Or will a spoonful of objectivity simply make the subjectivity more palatable, but not improve results?
- Think about the immediately-preceding question and your answer. Are justifications merely reasoned excuses? Is “feeling good about results” sometimes the same as “better results”? Or, in its role as moderator, will reasoned thought consistently add to the result?

Finally, always ahead of his time, John Cleese in his role as Professor at Large at Cornell University gave a lecture on decision making on April 4, 1999 in which he also linked the emotional and rational, lamenting the lack of credit given to intuition. When presented with the idea that “the kind of thinking business managers should be using all the time is fast, purposive, deliberate, logical, computer-type thinking,” his response was,

*“Codswallop. Horsefeathers. Hogwash. Fiddlesticks. Balderdash. Flapdoodle. And Poppycock.”*



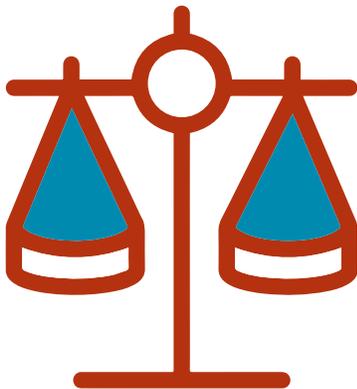
### Treatment 3: The Connection

(Approximate Time Allotment: 45 minutes)

**Engagement Platform:** Class Activity

Decision making is not accomplished in a vacuum. In fact, in the process steps in Treatment 1 above, Take Action is one of the steps and action is necessary for the other steps. (ex. Information will not magically appear. You must take action to gather the information.) In this guide, in Learning Experience 3 – Self and Others, Treatment 1, Action also plays a prominent role. In that Treatment we identified a flow between Mission, Vision, Values, Action, Capacities or Strengths, and Belief; each of these in some way impacts and influences each of the others. You will learn or have learned this in LE 3. In this learning experience, the first two treatments have established an awareness of the complexity and messiness of decision making and provided some rudimentary tools to aid in your efforts. In this third treatment we will add some depth to your awareness by connecting the importance of decision making to all other learning experiences.

At first it may feel obvious that “of course” decision making plays a role in all learning, and it would be easy to nod and move on. And if we do this, it would be consistent with a majority of our decisions. Think about it. Countless number of times each day we act without consciously 1. Identifying the decision, 2. Gathering the information, 3. Identifying the alternatives, 4. Weighing the alternatives, 5. Choosing your alternative, 6. Taking action, and 7. Reviewing your decision. And countless number of times each day we miss an opportunity. Granted, it is not realistic to stop each moment and decide to breathe, but when we do that it is called mindfulness; and researchers the world over proclaim the health benefits of this specific decision making process.



Another important consideration intended to aid in your awareness of the importance of decision making is the idea of autonomy. It is the nature of the human beast to believe in free will. But if the only time we stop to consciously process a decision is when we are stopped by disagreement or a dilemma, isn't this more like free won't? (It should be noted that varying takes on “free will vs. free won't” have been considered and are still debated since Benjamin Libet's famous experiments in the 1980's showed brain activity before action.) If you only stop to think about things when you disagree, you are not using all the steps in the decision making process.

**Facilitator Notes:** *In other words, we should be thinking about the decisions we are thinking about, no matter how we feel about it. It might behoove the facilitator to review some literature on free will, for example Sam Harris or Benjamin Libet.*

*Note how leaders often follow steps 1-6 in the decision making framework, however, Step 7 is often skipped. The sheer pace of decision making and the degree to which something is urgent or important often lures a principal into “Make the call and move on” decision making habits. Failure to reflect on the outcome of our decisions often invites a return engagement under less than optimal circumstances.*

*In characterizing decisions as straightforward, rational, or emotional, it is important for leaders to remember that their perspective is not necessarily shared by those subject to the decision. Individuals often seek to label decisions as right/wrong based on their personal sense of how a particular situation should be addressed. Further, efforts to interpret what a decision “means” can have a significant effect on future contexts.*



**Exercise:** In your small groups:

- Look at the seven steps in the decision making process again and discuss the steps commonly excluded from routine or instinctive decisions.
- Discuss the relationship between learning and decision making. Is one possible without the other?
- Consider the flow (Mission-Vision-Values-Action-Capacity-Belief) from the first paragraph of this treatment and discuss how a more conscious process of decision making might influence or change each of these.
- Think of a classroom example in which your choice of instructional design or technique could have benefited from a more conscious decision making process. If willing, share the example.
- In addition to health and autonomy, discuss and list any other personal benefits of consciously processing decisions. Don't be afraid of being obvious.
- Create a spectrum in your mind with "shoot from the hip" at 0 and "massive over analysis" at 10; (the numbers are merely markers and not judgements). Now put yourself on this spectrum and you cannot choose 5.



# Missouri Leadership Development System (MLDS)

## Aspiring Level Learning Experience 5:



Reading and Shaping School Culture: How to see and shape the invisible, but powerful, forces that fuel or freeze a school's improvement efforts.

**Facilitation Guide:** Facilitator notes are inserted near the corresponding section of the participant guide.

**Facilitation Note:** With all four of the Aspiring Level Learning Experiences Introduction and Rationale section can be used in multiple ways as a resource. Facilitators could use the section as a warm up activity, as a “read ahead,” as the basis for a Socratic seminar, to support small or large group discussions, or as a review/closure activity, to list just a few possibilities.

### Introduction and Rationale:

Each and every school comes equipped with a strong, existing culture. This invisible, but powerful, force is the primary determiner of success for a school's improvement efforts (Fullan, 2007; Hollins, 2015).

It is an unfortunate twist that many school administrators are selected for their positions based on their abilities to produce tangible, structural results; designing a school schedule, supervising employees, enforcing school discipline, or balancing a budget. However, beginning on day one of the job as school administrator, the primary factor for success is no longer tangible (Cunningham & Cresso, 1993). It is the leader's ability to understand, assess, and positively shape the intangible, but powerful, force that fuels or freezes a school's improvement efforts- school culture.

Culture, being an invisible force, lends itself to several definitions and descriptions...

- The totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought characteristics of a community or population. (The American Heritage Dictionary, 1975)
- The set of attitudes, values, goals, and practices that characterizes a company or corporation. (Merriam-Webster's Collegiate Dictionary, 1993)
- The guiding beliefs and values evident in the way a school operates (Fullan, 2007)
- The qualities of any specific human group that are passed from one generation to the next. (Kotter & Heskett, 1992)
- A system of informal rules that spell out how people are to behave most of the time. (Deal & Kennedy, 1982)
- The way we do things around here. (Bower, 1966)

The culture of a school plays an essential role in improving performance. Positive culture can infuse work with meaning, passion, and purpose (Deal & Peterson, 1999). A positive school culture is associated with more rapid and lasting school improvement, higher teacher motivation, greater teacher collaboration, more application of professional development skills, reduced absenteeism, and higher levels of adult and student learning (Hofstede, 2005; Fullan, 2007; Deal & Peterson, 2009).

The learning experience Reading and Shaping School Culture seeks to develop administrators' abilities to:

- A. Gain a clearer understanding of the nature and power of school culture by identifying, describing, and analyzing powerful non-school organizational cultures.



- B. Demonstrate the ability to understand, read, and assess current school culture by applying culture assessment criteria.
- C. Understand elements of culture such as heroes, stories, myths, traditions, rituals, ceremonies, symbols, and signs, which have, over time, shaped the current school culture.
- D. Assess and improve aspects of personal and organizational trust.

## MLDS Engagement Platforms and Treatments for LE 5

Reading and Shaping School Culture: How to see and shape the invisible, but powerful, forces that fuel or freeze a school's improvement efforts.

### Treatment 1: Finding Stability

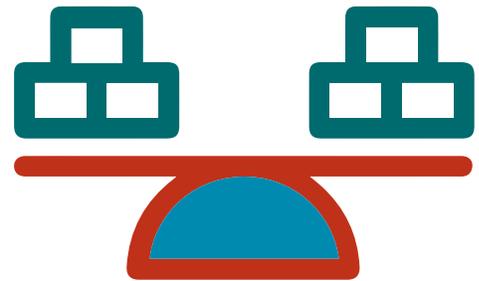
(Approximate time allotment: 45-60 minutes)

#### Engagement Platforms: Classroom

Edgar H. Schein, in *Organizational Culture and Leadership, Fourth Edition*, (2010) suggests that "culture is to a group what personality or character is to an individual." He goes on to say, "Culture as a concept is thus an abstraction." He then brings us back onto firmer ground when he says,

*"Culture implies some level of structural stability in the group. [Culture] is not only shared but also stable because it defines the group. After we achieve a sense of group identity, which is a key component of culture, it is our major stabilizing force and will not be given up easily. Culture is something that survives even when some members of the organization depart. Culture is hard to change because group members value stability in that it provides meaning and predictability."*

The purpose of this treatment is to acquaint you with the seemingly contradictory idea of abstract stability. Much like staring into the sun, to attempt to define culture by looking directly at it is an exercise in futility. And in this sense, organizational or school culture is indeed a bright ball of fire with the potential to provide warmth and light, and permeate, (thus stabilizing), all aspects of a given group. As you go through the exercise below, remember that the components identified in the article are NOT the culture, but the tendrils of light intertwined within and ultimately emanating from the culture.



#### Exercise:

Read John Coleman's article, "*Six Components of a Great Culture*"  
<https://hbr.org/2013/05/six-components-of-culture>

Discussion (in small groups):

- The article identified vision, values, practices, people, narrative and place as components of culture. Brainstorm and list other components or sub-components of organizational culture you have experienced. (For our purposes, components and elements are the same.)
- Think of some businesses that you frequent, and discuss strong and weak examples of these components as represented from your exposure.
- Without discussing, each individual should consider how each of the six components from the article will impact organizational stability and then rank them (1 thru 6) accordingly. Share your rankings. Did everyone in your group agree? Do you think it is a good idea for an organization to rank contributing components or sub-components? Do you think it is a good idea for individuals in the group to have some autonomy in choosing what is important to them? (Somewhat redundantly), is it better to strongly encourage a direction? Or is it better to allow a culture to evolve naturally?
- Share lists, thoughts and discussion with the larger group.



## Treatment 2: Embracing Abstraction

(Approximate time allotment: 45-60 minutes)

### Engagement Platforms: Classroom

In Treatment 1 above we introduced some tangible, identifiable components or elements that aid in the structural stability of organizational culture. In this treatment we will fly closer to the sun and try to glimpse (with squinted eyes) the powerful, intangible inner workings of organizational culture. We will start by looking at some possible overarching descriptors for actual culture.

In his 2018 book *The Challenge Culture: Why the Most Successful Organizations Run on Pushback*, Nigel Travis identifies some of these types of organizational culture. It should be noted that Travis does not offer this as an all-encompassing list. There are many typology offerings in the literature, with varying agendas and emphases; but we will use the three descriptors below from Travis to give us a jumping-off point for further discussion, which in turn may provide some relevant insight into the general concept.

1. \*Culture of Silence: head down, mouth shut, keep moving. (\*Travis borrowed this phrase from David Maxfield.)
2. Culture of Challenge: questioning and dialogue – pushback.
3. Culture of Confrontation: attack, insult, intimidate; often with an agenda and/or for personal power.

### Exercise:

Discussion (in small groups and/or in larger group):

- In his book Travis gives examples of confrontation vs. challenge and acknowledges that what one individual or group calls challenge another might define as confrontation. Steve Jobs likened polishing rocks in a tumbler to a “group of incredibly talented people bumping up against each other, having arguments, having fights sometimes, making some noise, and working together. They polish each other and they polish the ideas, and what comes out are these really beautiful stones.” Watch Steve Jobs: <https://www.youtube.com/watch?v=K-Yv-UdsmSo>
- How much challenge, how much friction, is too much? Give examples.

Though we may not agree on just how much of a quality is the right amount, we are likely to find more consistent agreement in naming specific characteristics common to certain types of culture. In fact, the three types of culture named by Travis above, name characteristics in their descriptors: silence, challenge, and confrontation.

- On a large paper or board make 3 columns, (Silence, Challenge, and Confrontation), and list other notable characteristics in the most appropriate column; (if there is disagreement, come to a consensus). If you need to jump-start your thinking, remember Schein’s suggestion that “culture is to a group what personality or character is to an individual” and look at this list – (<http://ideonomy.mit.edu/essays/traits.html>) – of 638 Primary Personality Traits, (234 Positive, 112 Neutral, and 292 Negative).

**Facilitator Notes:** *Prior to facilitating this treatment, be sure to make available the ideonomy link above. Associate personality traits with organizational traits according to Schein’s suggestion. For example, taking an “A” trait from each positive, neutral, and negative on the ideonomy list. Accessible would be in the challenge column, aggressive could be in the confrontation column but might be some discussion for the challenge column, and abrasive would be in the confrontation column. An example for the silence column might be aloof. The facilitator should review the list so that students can be kept from overthinking.*

So far, we have introduced 1) the concept of organizational culture, 2) its components or elements, and 3) positive, neutral and negative characteristic traits. If we put these into a formula, it could read “Organizational Culture equals (Component 1 times Component 2...) plus or minus characteristic traits” or

$$OC = (C1 \times C2 \times \dots) \pm CT$$



In this form it is clear why organizational culture is so difficult to quantify. Not only will the relative values of the components and traits differ from one individual to the next and from one group to the next, but the components and traits will also frequently change and evolve. In addition, as pointed out by Edgar Schein, “the group may split into subgroups that develop their own subcultures . . . where there are beliefs and values that work at cross purposes with other beliefs and values leading to situations full of conflict and ambiguity.” It is not always the case that subcultures are at odds, but they will add complexity; and regardless of productively, the addition of subculture to the third or fourth power, will contribute to an organizational culture that becomes even more mind-bogglingly unquantifiable. It is not recommended that you try to apply this formula; it is merely here to emphasize the intangible complexity.



**Discussion:**

- Do you visit multiple locations of a single brand such as a coffee shop or a grocery store or a sandwich place? Have you found yourself traveling further to go to your preference? If so, why? Are there tangible reasons? Or is it hard to put your finger on the reason(s) for your preference? Are these examples of subcultures? If you believe so, from your observations, are the results productive or nonproductive?
- In the above bullet point it is conceivable that at least some of the examples discussed were positive and productive, giving the consumer choices. It is also possible that the differentiation according to geography/neighborhood and clientele is purposeful and actually part of the overall culture; not necessarily a subculture. Discuss, (with examples) how purposeful differentiation might backfire on a well-meaning organization.
- Now follow this link – (<http://clsbluesky.law.columbia.edu/2014/09/12/the-broader-governance-lessons-of-the-valukas-report/>) and read as much as is necessary for context, but focus specifically on Governance Lessons Four and Seven as learned from the General Motors ignition switch controversy. Can you come up with other examples of fragmented cultures (Joanne Martin, 1992) that were nonproductive, harmful or dangerous? Based on these lessons, talk (carefully) about organizational silos you may have experienced or observed in school cultures you have been a part of.

**Treatment 3: Bridging the Gap**

(Approximate time allotment: 45-60 minutes)

**Engagement Platforms: Classroom**



In the two treatments above we worked to recognize stability, giving us something to hold on to as we immersed ourselves into the powerful but mysterious abstraction of culture. In this treatment we will work to demystify this process a little further so the leap from structural stability to impalpable complexity becomes even more manageable.

**Exercise:**

Read Bill Barnett’s article “When Choosing a Job, Culture Matters”

<https://hbr.org/2012/05/when-choosing-a-job-culture-ma>



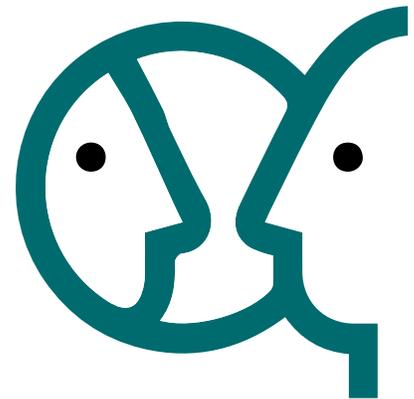
Discussion (in small groups):

- What is your biggest takeaway from this article? How might this help you in your current position? How might this help you in a future leadership position?
- In the article Barnett lists a number of questions he asked multiple people to learn about the organizational culture, including:
  - ✓ What are you excited about?
  - ✓ What are you proud of?
  - ✓ Who are your close friends in the company?
  - ✓ How does the group function together?
  - ✓ Who are the heroes?
  - ✓ What made them successful?
  - ✓ What will be my biggest challenges and opportunities in the job?
  - ✓ How will you keep score on me?
  - ✓ How will you really know I am making a difference?

List and share 2 or 3 cultural considerations, (components and/or characteristics), that are very important to you and discuss and list any obvious questions you would ask, that he did not ask.

- Why are open-ended questions so important to this process?
- In your small group share a positive or negative story that reveals your strong feelings about one of the cultural considerations you listed above.
- Why are stories so important to this process?

Barnett also presented several tips on what, how and when one should learn about a new culture. To this end, Edgar Schein further found that, (for those new to an organizational culture or for those observing from the perspective of an outsider), in order to immerse yourself into a culture you must “examine [your] own assumptions about how things should work.” In one example he found himself somewhat appalled by one group’s discourtesy; but once he let go of his personal aversion to interruption and multiple people talking at once, he was able to slow the pace somewhat by asking questions and gain a better understanding. He found that in this group the members



“Shared the assumption that you cannot determine whether or not something is true or valid unless you subject the idea or proposal to intensive debate. Only ideas that survive such debate are worth acting on, and only ideas that survive such scrutiny will be implemented. The group members assumed that what they were doing was discovering truth, and, in this context, being polite to each other was relatively unimportant.”

Once Schein accepted this premise, the newfound understanding aided the communication process and Schein was able to move past the discourtesy to productivity and progress without sacrificing his personal principles.

## Discussion:

- If you find yourself in a dream job surrounded by a nightmare culture, is there anything you can take away from Schein's learning that might help you? In a sense, Schein learned to respect disrespect – If respect is one of your top cultural considerations, could you do the same? Regardless, as a peer, how might you begin to work toward change? As a supervisor, boss or leader, would you work toward change differently than as a peer? If so, how?
- Think of your longest tenure toughing it out in a nightmare culture and share some learning from this experience.
- Instead of you working to change a nightmare culture, have you ever been changed by one? In hindsight, did you finally see the light? Or did you come to the dark side? Or did you perhaps actually meet somewhere in the middle?

### **Treatment 4: Climate vs. Culture**

(Approximate time allotment: 30 minutes)

**Engagement Platforms:** Classroom

We have engaged in activities about organizational culture, specifically related to schools and leadership. Before we leave the notion of culture, its complexity and significance, it is important to be sure we understand the difference between school culture and school climate, as they are two very different things. As school leaders, we must know the difference between our school's culture and its climate, and how to address both.

Typically, organizational culture refers to deeper and ingrained values, beliefs and guiding principles of the organization. It governs behavior and frames employees attitudes, boundaries, guidelines and constraints. Organizational climate on the other hand is more about the mood or the temperature of an organization and is more fluid than culture.

### **Exercise:**

1. In small groups and after a small explanation, predict what experts will say are the difference in culture and climate.
2. Watch this video ([https://video.search.yahoo.com/yhs/search?fr=yhs-att-att\\_001&hsimp=yhs-att\\_001&hspart=att&p=todd+whitaker+on+climate+vs.+culture#id=2&vid=2cd876a041218d4a0fe6ca776bd4bdea&action=click](https://video.search.yahoo.com/yhs/search?fr=yhs-att-att_001&hsimp=yhs-att_001&hspart=att&p=todd+whitaker+on+climate+vs.+culture#id=2&vid=2cd876a041218d4a0fe6ca776bd4bdea&action=click))
3. Follow that up with a quick read of Organizational Culture vs. Organizational Climate (<https://itsyourturnblog.com/organizational-culture-vs-organizational-climate-eadbd15a33e0>).
4. Now in your small groups, brainstorm different scenarios in your own school that would reflect climate and other scenarios that reflect culture. Talk about why each is culture vs. climate or climate vs. culture. Compare your experiences and how you see them.
5. Join small groups and share your lists, discussing and gaining consensus from the bigger group on climate vs. culture. After a few minutes, combine every other group so that you are having a larger group discussion about school climate vs. culture each time. In the end, it will be a whole-class discussion of your examples.
6. After the activity students may complete an individual writing reflection explaining how they might look at climate vs. culture from an administrative perspective. You might include things like how this thinking impacts goal setting, timelines, expectations, relationships and day to day behavior.



## When Choosing a Job, Culture Matters

Bill Barnett

MAY 02, 2012

<https://hbr.org/2012/05/when-choosing-a-job-culture-ma>

Some organizations will excite you. They'll stimulate your success and growth. Others will be stressful. They may lead you to quit before you've accomplished much or learned what you hoped to. With the pressure (or excitement) of finding a new job, it's all too easy to pursue a job opportunity or to accept an offer with only a hazy view of how the institution really operates. The path to an institution you'll like is to investigate the culture you're thinking of joining before you accept the position.

Sean (name has been changed) is a master at this. He pursued a job offer at a Fortune 500 company to be the first Chief Administrative Officer (CAO). He was well-qualified, presented himself well, and got the offer. He'd been competing with capable people. He was proud he'd "won the contest."

The next step was a return visit, after which he'd decide to accept the offer. Sean had already learned a lot about the company's businesses and some things about the organization. His priority now was culture and how the new position might fit: "I asked people, 'What are you excited about? What are you proud of? Who are your close friends in the company? How does the group function together?'" Sean learned things like who the heroes were, what made them successful, and what his biggest challenges and opportunities would be in the job. The different people he met with were learning from his questions. It was almost like he already worked there, and they were jointly determining how to make the new role successful.

Surprisingly, Sean turned down the offer. The new role was a misfit in the company's culture.

As he learned more about the company, Sean questioned how he'd be viewed as the first CAO in a company where everyone else focused on bottom-line results. It was a highly performance-driven environment with lots of business units. Corporate staffs were secondary.

"I asked how they'd keep score on me, how they'd really know I was making a difference," he said. "We never got to satisfactory answers to that question. They weren't hiding anything. This CAO position was a new one, and they didn't really know."

Sean was concerned that this new position wouldn't fit in the company's culture, that he wouldn't really be accepted, and that it wouldn't be a springboard to the line job that he really wanted after two or three years as CAO. He might have made it work, but why take the risk?

It's not uncommon for job seekers to enter organizations without understanding the culture and come away disappointed. When considering a new job, be sure to investigate the institution's culture. Consider these questions to guide you:

1. What should I learn? Understand the organization's purpose — not just what they say they're doing, but also how their purpose leads to decisions and what makes them proud. Learn how the organization operates. For example, consider the importance of performance, how the organization gets things done, the level of teamwork, the quality of the people, how people communicate, and any ethical issues.

Except for ethical issues, there's no absolute standard of what's best in organizational culture. Different purposes and different organizational features can be more or less appealing to different people.

When you understand how the potential employer operates, you'll need to consider how well that matches your goals. Your target organizational culture is an important part of your aspirations.

2. How should I learn? Read everything you can find about the institution, but read with a critical eye. Institutions have formal vision statements, and they often mention cultural topics in other public reports, but these documents are written with a purpose in mind. Independent writers take an independent perspective. They can be more critical, but they can miss details and get things wrong.



Discuss culture with people in the organization. You'll talk to people in the interviewing process, of course. But you may learn different things if you meet others there who aren't involved in your recruiting process. Also talk to people outside the organization who know it — customers, suppliers, partners, and ex-employees. Their different experiences with the institution will affect their views, so ask about situations where they've seen the culture in action.

3. When should I learn? It's hard to learn about culture at an early stage in your search. But your impressions can guide you to target some institutions and avoid others.

Culture may come up in job interviews, although it may be complicated to do much investigation when you're trying to sell yourself. People sometimes worry that discussing culture might make people uncomfortable and put a job offer at risk. The culture topic is certainly not off-base, and it is necessary to know for future growth in the company. Hiring managers should expect it. Whether it's in interviews or after you have an offer, you'll do best if your questions show you're learning rapidly about the organization, taking the employer's perspective, and beginning to figure out how to succeed there. Culture questions can cast you in a positive light. Sean's line of questioning confirmed the CEO's judgment to hire him, even if Sean didn't like the answers.

What's your view of how culture affects the job search? Has culture played a part in how you choose your future employer?

An adapted version of this post is included in the HBR Guide to Getting the Right Job.

Bill Barnett led the Strategy Practice at McKinsey & Company and has taught career strategy to graduate students at Yale and Rice. He now applies business strategy concepts to careers. He is also a contributor to the HBR Guide to Getting the Right Job.

### Six Components of a Great Corporate Culture

John Coleman

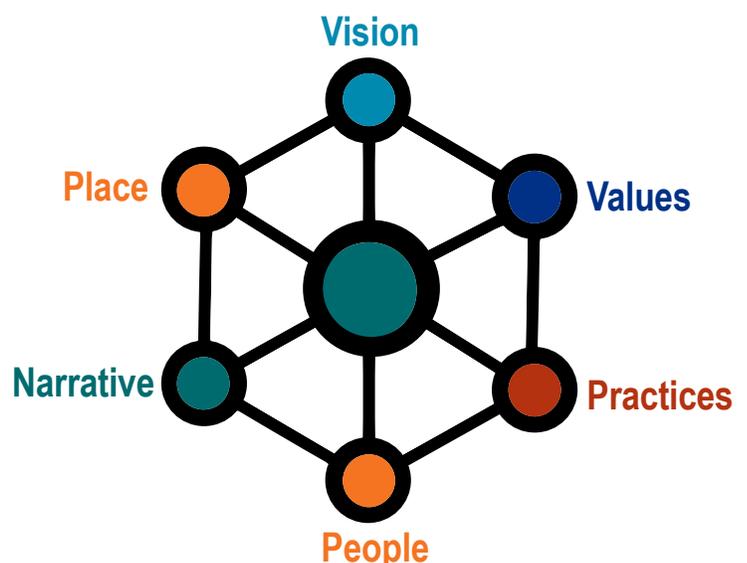
MAY 06, 2013

<https://hbr.org/2013/05/six-components-of-culture>

The benefits of a strong corporate culture are both intuitive and supported by social science. According to James L. Heskett, culture “can account for 20-30% of the differential in corporate performance when compared with ‘culturally unremarkable’ competitors.” And HBR writers have offered advice on navigating different geographic cultures, selecting jobs based on culture, changing cultures, and offering feedback across cultures, among other topics.

But what makes a culture? Each culture is unique and myriad factors go into creating one, but I've observed at least six common components of great cultures. Isolating those elements can be the first step to building a differentiated culture and a lasting organization.

**1. Vision:** A great culture starts with a vision or mission statement. These simple turns of phrase guide a company's values and provide it with purpose. That purpose, in turn, orients every decision employees make. When they are deeply authentic and prominently displayed, good vision statements can even help orient customers, suppliers, and other stakeholders. Nonprofits often excel at having compelling, simple vision statements. The Alzheimer's Association, for example, is dedicated to “a world without Alzheimer's.” And Oxfam envisions “a just world without poverty.” A vision statement is a simple but foundational element of culture.



2. **Values:** A company's values are the core of its culture. While a vision articulates a company's purpose, values offer a set of guidelines on the behaviors and mindsets needed to achieve that vision. McKinsey & Company, for example, has a clearly articulated set of values that are prominently communicated to all employees and involve the way that firm vows to serve clients, treat colleagues, and uphold professional standards. Google's values might be best articulated by their famous phrase, "Don't be evil." But they are also enshrined in their "ten things we know to be true." And while many companies find their values revolve around a few simple topics (employees, clients, professionalism, etc.), the originality of those values is less important than their authenticity.
3. **Practices:** Of course, values are of little importance unless they are enshrined in a company's practices. If an organization professes, "people are our greatest asset," it should also be ready to invest in people in visible ways. Wegman's, for example, heralds values like "caring" and "respect," promising prospects "a job [they'll] love." And it follows through in its company practices, ranked by Fortune as the fifth best company to work for. Similarly, if an organization values "flat" hierarchy, it must encourage more junior team members to dissent in discussions without fear or negative repercussions. And whatever an organization's values, they must be reinforced in review criteria and promotion policies, and baked into the operating principles of daily life in the firm.
4. **People:** No company can build a coherent culture without people who either share its core values or possess the willingness and ability to embrace those values. That's why the greatest firms in the world also have some of the most stringent recruiting policies. According to Charles Ellis, as noted in a recent review of his book *What it Takes: Seven Secrets of Success from the World's Greatest Professional Firms*, the best firms are "fanatical about recruiting new employees who are not just the most talented but also the best suited to a particular corporate culture." Ellis highlights that those firms often have 8-20 people interview each candidate. And as an added benefit, Steven Hunt notes at Monster.com that one study found applicants who were a cultural fit would accept a 7% lower salary, and departments with cultural alignment had 30% less turnover. People stick with cultures they like, and bringing on the right "culture carriers" reinforces the culture an organization already has.
5. **Narrative:** Marshall Ganz was once a key part of Caesar Chavez's United Farm Workers movement and helped structure the organizing platform for Barack Obama's 2008 presidential campaign. Now a professor at Harvard, one of Ganz's core areas of research and teaching is the power of narrative. Any organization has a unique history — a unique story. And the ability to unearth that history and craft it into a narrative is a core element of culture creation. The elements of that narrative can be formal — like Coca-Cola, which dedicated an enormous resource to celebrating its heritage and even has a World of Coke museum in Atlanta — or informal, like those stories about how Steve Jobs' early fascination with calligraphy shaped the aesthetically oriented culture at Apple. But they are more powerful when identified, shaped, and retold as a part of a firm's ongoing culture.
6. **Place:** Why does Pixar have a huge open atrium engineering an environment where firm members run into each other throughout the day and interact in informal, unplanned ways? Why does Mayor Michael Bloomberg prefer his staff sit in a "bullpen" environment, rather than one of separate offices with soundproof doors? And why do tech firms cluster in Silicon Valley and financial firms cluster in London and New York? There are obviously numerous answers to each of these questions, but one clear answer is that place shapes culture. Open architecture is more conducive to certain office behaviors, like collaboration. Certain cities and countries have local cultures that may reinforce or contradict the culture a firm is trying to create. Place — whether geography, architecture, or aesthetic design — impacts the values and behaviors of people in a workplace.

There are other factors that influence culture. But these six components can provide a firm foundation for shaping a new organization's culture. And identifying and understanding them more fully in an existing organization can be the first step to revitalizing or reshaping culture in a company looking for change.

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