

Competing Values Form Obstacles To Change

Deep conversations uncover invisible goals

By Valerie Von Frank

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When heart patients were given life-or-death advice, only one in seven was able to change his or her habits, according to a recent study. If the status quo is so powerful that people will stare down death, how can systems overcome inertia?

Two Harvard professors have explained what they term "immunity to change" — and what those willing to challenge their own and others' thinking can do to make a difference.

"Running alongside our visible and expressed values is a competing set of values we're unaware of," said Robert Kegan, professor of adult learning and professional development and co-author of *Immunity to Change: How to Overcome It and Unlock Potential in Yourself and Your Organization* (Harvard Business School Press, 2009). "Core values are a tremendous piece of leadership.

Leaders need to be able to articulate values in a way that have flesh and bone connected to them — but that doesn't get you into the end zone by itself. Just wanting (change) isn't enough.

"We fail at accomplishing our visible goals because of our success in accomplishing invisible goals," he said in an interview.

Kegan tells this story as an illustration:

A large school district in California gathered its leadership team to discuss how to improve learning for Hispanic students, who were about three-fourths of the district's population. The team, using Kegan and Lahey's approach, identified first their expectations for the students. Then they identified obstacles that were getting in the way.

The next steps, though, are key. The group identified worries and hidden motivations, thinking such as "I'm afraid learning new ways of operating will lead me to feel incompetent" and "I don't feel like we have time to do the extra work." These were the third column in the chart that is the core of Kegan and Lahey's process (see tool, pp. 4-5).

The final step was to begin to identify a few small actions members could take that would "test" these competing assumptions that were holding them back from change and begin to allow them to see whether they could get to their main goal by demonstrating to themselves that these underlying assumptions might not hold true.

But the California group was coming to the end of a long day of work, and their comments about what fears were holding them back from their goals, Kegan thought, didn't really take them to the core of their resistance.

The next morning, an administrator approached and confided in Kegan, "If we're really honest about having a genuine commitment to higher expectations, we need to also recognize our commitment to a pobrecito, 'poor little ones,' culture — one that says, 'These children have so many burdens, how can we put more stress on them by creating a more rigorous program?'"

That breakthrough, when the administrator was willing to share it with the group, led to a much deeper discussion. "It was difficult to hear, but many agreed with him, and said, 'We've never had a way to talk about this,'" Kegan said. "It helped them to see you could undermine kids not out of disregard, but out of misplaced expressions of love.

"The process starts out so reasonable — identify barriers — that people say, 'Oh, we've done this a hundred times. ...'" But going beyond identifying barriers to revealing competing values that are being successfully supported is critical.

He and Lisa Lahey, researchers in adult learning and change leadership, contend that people's inability to reach a goal, to carry through on a resolution, is due to an underlying commitment to a competing goal that prevents change. The competing commitment, of which most people aren't even aware, holds them back. The unconscious assumption is that to fol-

low through on the new commitment would jeopardize the more deeply held, competing commitment, and so individuals effectively sabotage themselves over a perspective Kegan and Lahey term the "Big Assumption." The Big Assumption is a belief that we don't even question, but accept as an essential truth. Once people learn to recognize their own Big Assumptions, they can progress not only toward their goal, but in personal growth and development.

After uncovering Big Assumptions, the next step is to initiate change. Using small experiments built around the competing assumption, people begin to experience any flaws in the competing assumption and then to make the changes necessary to realize their main goals, Kegan said.

For instance, as educators in the California system put in place a little more rigor for the students, they might begin to see that the students rise to the challenge and don't crumble. That outcome then leads to adults altering their assumptions at a collective level.

"Once you have identified and unearthed hidden motivations," Kegan said, "you begin experiments to see if you can modify your behavior. It can lead to bigger development of oneself and of the system as a whole." The change allows people not only to potentially achieve their main goal but to change their underlying way of thinking to continue to learn in new ways, what Kegan called "creating a transformation in meaning-making systems."

The framework rests on a developmental theory of mindsets, Kegan said, that expresses the neural plasticity of the brain. In other words, people's minds continue to develop beyond adolescence, a breakthrough idea just a couple of decades ago. With that assumption, Kegan, a psychologist, has focused his work on creating ways to make that growth intentional.

For systems, growth begins, of course, with individuals. Kegan said organizations often are able to identify teams of about 12 to 18 key leaders. That group then completes a "focus 360" review, with each individual talking to peers, those who report to them, those to whom they report, and a significant person in their private lives to determine a single change goal — "one big thing" they could change to become significantly better at what they do.

While some might balk at revealing matters they perceive as very personal, he said he points out to groups that everyone has worked for a leader with "issues" that staff had to work around. When people recognize that they may be the person someone in the organization is finding impedes progress, they become more willing to examine their own mental models, he said.

Work teams then discuss their individual immunities around a shared goal, following up with a look at group immunities, Kegan said. He and Lahey have spent the years since writing *How the Way We Talk Can Change the Way We Work: Seven Languages for Transformation* (Jossey-Bass, 2001) working with leaders and teams across various cultures and fields within many systems refining their process and seeing its impact.

"A system can overcome its immunity," Kegan said. "This is a powerful launch pad for learning."

Putting All the Pieces Together: Balanced Literacy Learning



By Laura Benson, published poet and author, teacher educator and literacy consultant

Ms Benson will present a two-day institute at the Fall Training Institute entitled, "Putting All the Pieces Together: Creating and Deepening Balanced Literacy Learning" (see the "Events" section.)

As an invitation and a window into Putting All the Pieces Together, I offer the following as an illustration of the pedagogy and practices we will study together:

Comprehensive Literacy Learning & Teaching

READERS' WORKSHOP *phonics; vocabulary; fluency; grammar; comprehension	WRITERS' WORKSHOP *spelling; writing process (such as drafting, revising, editing, etc.); grammar; vocabulary; fluency
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INDEPENDENT Reading	INDEPENDENT Writing
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MENTORING • Modeling & Demonstrating Reading by Teacher(s) & Peers • Read Alouds	MENTORING • Modeling & Demonstrating Writing by Teacher(s) & Peers • Read Alouds
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COLLABORATIVES • Shared Reading • Guided Reading • Teacher-Student Conferences • Peer Conferences • Partner/Buddy Reading • Book Clubs/Literature Circles	COLLABORATIVES • Shared Writing • Guided Writing • Teacher-Student Conferences • Peer Conferences • Partner/Co-Authoring • Word Work/Study
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Teachers and students engage in ongoing assessment and evaluation to monitor and determine each child's individual progress as reader, writers, and learner.

To develop responsive and rigorous apprenticeships for and with our students, we must know each child as an individual reader, writer, and learner. Accordingly, we monitor each child's literacy growth continuously and thoroughly by assessing him/her with multiple tools and data sources.

We further evaluate our students' literacy learning by using developmental continuums which outline the ten stages of reading and writing development as well as the key indicators or behaviors of reading and writing acquisition for each stage of development. By understanding where each child is developmentally, we can customize instruction for all our students so that their literacy learning is relevant and powerful.



NESA Virtual Science Fair Completes Another Successful Collaborative Competition

By Stuart Fleischer, NVSF Project Manager and Science Teacher, WBAIS, Israel

The winners of the 2009 NVSF for middle and 5th grade Projects have arrived. This year's semi-virtual science competition had over 1,700 students from grades 5-8. The winner of the middle school event was Daniel Jackson from TAISM (The American International School of Muscat). Daniel came in second place last year and was determined to take the trophy from AIS Johannesburg and bring it home to TAISM. Carey Johnson, Daniel's NVSF sponsor at TAISM said he was very determined to win the competition this year. His research title was, "What surface texture is the most aerodynamic?" He had some close competition from WBAIS – Israel, Cairo American College with 2 teams, AIS Chennai, CalTex Sumatra and AIS Riyadh. Nine Scientists ranging in fields from Geology to Biochemistry judged the top 7 teams. Congratulations to Daniel and thanks to bringing our NVSF trophy home from South Africa!

Cathy Berghahn, the NVSF Coordinator at CAC, has been asked to prepare to share with Mrs Mubarak and the Minister of Education the details of the NESA project to see how they may develop a similar program in Egyptian national schools. The NVSF5th Project had a fantastic year. Jimmy Leeper the project coordinator led 10 teams to a very successful year. This year's winner was WBAIS – Israel. Elisa Cifelli, Avital Vulf and Shivani Mansingh are the students that worked with their teacher, Susie Geller. The project title, "What is the effect of carbohydrates on different genders?" received praise from the e-judges.

This year the travelling NVSF5th trophy will move from LS Nepal to WBAIS. Also the Cameron Cup will be given to the 5th graders at WBAIS. This trophy honors Dr Bea Cameron whose vision and dedication to the success of the NVSF5th Project has been greatly felt by the teachers, students and schools participating in this project.

If you are interested in joining the NVSF middle school project or the NVSF5th Project, please contact Dr Stuart Fleischer at sfleischer@wbais.org.

On a side NVSF note, the CAC science fair program has caught the attention of Egyptian government officials this year, including the First Lady of Egypt, Susan Mubarak. Several teams have been invited to participate in Egypt's world environment day program in September.

Our Beliefs

We believe:

- individuals and organizations thrive only through continuous, transformative learning;
 - diversity strengthens us, enriches us and prepares us for an increasingly complex world;
 - respect, integrity and trust are essential to create and sustain learning communities.
- Collaboration is the cornerstone of our success.

Our Mission

To maximize student learning, NESA serves member schools by facilitating sustainable and systemic school improvement based on the best practices of American and international education.

Our Vision

NESA will create dynamic, collaborative professional relationships which transcend current barriers and boundaries in order to maximize student learning in member schools.