A Culture of Candor: Leveraging Developmental Principles to Create a Learning Culture within a Non-profit Startup

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Accessibility
A Culture of Candor: Leveraging Developmental Principles to Create a Learning Culture within a Non-profit Startup

Doctor of Education Leadership (Ed.L.D.)

Capstone

Submitted by
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“When we show up boldly and practice the best ways to be wrong, we fail forward. No matter where we end up, we’ve grown from where we began.” —Stacey Abrams

“This may only be a dream of mine, but I think it can be made real.” —Ella Baker
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Abstract

The Principal Impact Collaborative (PIC) at the University of North Texas at Dallas creates transformative learning experiences for principals in school districts across the Dallas-Fort Worth metroplex. In its fifth year, this small nonprofit is challenged with balancing quick growth with the sustainability of its internal team. Both of these challenges were exacerbated by the complexities brought on by the pandemic in professional and personal ways. As a resident, I led an internal initiative to create a culture of learning to support this rapid growth and honor and respect the individuals doing the work. This capstone describes our journey to become more deliberately developmental as a lever to improve team effectiveness and increase organizational learning in order to scale effectively. This is done through three enabling conditions: become more candid, provide more critical feedback, and engage in productive conflict. Throughout this capstone I rely on adult development theory and the research on Deliberately Developmental Organizations from Robert Kegan and Lisa Lahey, as well as teaming and psychological safety concepts from Amy Edmondson, to intentionally create an environment of vulnerability, open communication, and feedback. Ultimately, this capstone points to the need to humanize our companies, organizations, and schools. In every sector, we could all flourish and thrive if we were unafraid to speak our truth, to provide honest feedback, and to engage in productive conflict. If we knew we could do such things without fear of retribution, we could each add to the collective learning of the places where we work and improve the overall effectiveness of the work itself through our increased collaboration and resulting innovation.
Introduction

At the core of each of us, we want to be truly known and understood, and to feel respected and valued. Sara Lawrence Lightfoot speaks of this human experience: “When we are respectful of others, we are genuinely interested in them. We want to know who they are and what they are thinking, feeling, and fearing. We want to know their stories and their dreams” (Lawrence-Lightfoot, 2012). To do truly excellent and transformative work, we must each be able to show up in all of the aspects of our lives as our whole selves. To be truly transformative, we must not check our baggage at the door each day, covering up a part of our identity, trying to “fit in.” Rather, we need to capitalize on our strengths and be fully accepted, and developed, in our areas of growth.

In all sectors, adults too often show up to work each day with two jobs: their actual job as defined by the job description, and the job of hiding and concealing their fears, worries, or mistakes. This is also true in education -- both in non-profits supporting schools and especially in schools and districts rife with archaic power structures and hierarchies which penalize vulnerability and mistakes.

This doesn’t have to be the way we do business or education. Imagine an environment where people could come to work knowing they were cared for in their entirety, flaws and all - they could be developed and grown; they could give feedback and speak with candor without fear of retaliation; and they could be fully valued. Individual capacity for work - new and creative - could increase if each person were valued in their full humanity and were developed and grown thoughtfully. An organization with this type of environment could increase impact through innovative ideas and improvements to their current work, and could increase scalability, all while honoring and respecting the humans doing the work.

Research on Deliberately Developmental Organizations suggests people are looking for more out of their workplaces than simply a paycheck with benefits. Rather,
they are looking for fulfillment and opportunities to grow and develop. A Deliberately Developmental Organization (DDO) does this by creating a culture where people can bring themselves more fully to work (Kegan et al., 2016). For example, one company included in the DDO research, Decurion, operates with the belief that “People are not only means but also ends in themselves…. We feel that reducing people to a role in a process dehumanizes them. While honoring the roles they play, we approach people as fellow human beings, as ends in themselves” (Kegan et al., 2016, p. 27). This is carried out through many practices, one of which encourages Decurion’s employees to check in with each other intentionally and to respond transparently--so co-workers know how each other are really doing. By being able to show up at work as their full selves, they are able to be more honest about where they need to grow and learn, which impacts how they engage with one another in problem solving and ideating conversions (pp. 28-29). This type of culture explicitly benefits the company’s effectiveness through increased staff retention and productivity (Kegan et al., 2016, pp. 168-169).

This Capstone will describe one organization’s journey seeking to create a culture of trust and vulnerability that values adult development as a means for increasing team and individual capacity--ultimately promoting growth and a more meaningful individual and collective impact. This will be done through a strategic project conducted at the Principal Impact Collaborative (PIC) at the University of North Texas at Dallas which supports principals in school districts across the Dallas-Fort Worth metroplex.

Context

“Leadership is second only to classroom instruction among all school-related factors that contribute to what students learn at school” (National Comprehensive Center for Teacher Quality, 2008). A Bain study reported 92% of respondents agreed the school leader can significantly improve the performance of a struggling school (Bierly & Shy,
In 2004, the Wallace Foundation and The University of Minnesota published a study concluding the only way to transform a school was through a powerful leader (Bierly & Shy, 2013). However, the Bain study also points out that school leaders are now expected to manage complex operational systems; lead instructional practices across a wide array of subjects and grades; and develop, coach, and manage the human capital on their campuses. Unfortunately, most school leaders are not prepared with the skill sets or mindsets to do this work well, and they receive “inadequate coaching and training on these key skills” (Bierly & Shy, 2013). Further, a 2021 impact report from the Wallace Foundation finds that when a high-performing principal replaces a below-average principal, the average fifth grader increases learning by almost three months in math and reading (Grissom et al., 2021, p. 39). In short, we know the role of a school leader is pivotal to school transformation and most school leaders need more support and development to be excellent.

The Principal Impact Collaborative (PIC) aims to address this area of opportunity for school principals. PIC was developed locally in Dallas-Fort Worth, Texas, by Yasmin Bhatia, CEO of Uplift Education, as an answer to this complex leadership problem. Ms. Bhatia believed by investing in school leaders, she could impact an even greater number of students. She also understood, firsthand, the negative impact of principal turnover and sought to create a solution to not just improve principal effectiveness but to also retain them for longer. Her idea was to create a collaborative network of principals focused on innovation, resilience, and leadership, which resulted in the formation of the Principal Impact Collaborative (2020) to “support public school principals to drive impactful change on their campus” (A. Barbosa, personal communication, June 1, 2020).

Alejandra Barbosa, the current executive director, took over the project from Yasmin and developed it into a full-scale organization which provides a two-year fellowship for experienced principals focused on high quality training, coaching and
collaboration. The first cohort of principals began in the fall of 2016 and included principals from Dallas ISD, Fort Worth ISD, Grand Prairie ISD, and Uplift Education (A. Barbosa, personal communication, June 1, 2020). At the time, I was the primary school director of Uplift Summit International Preparatory and had the privilege of being in the first cohort of PIC principals.

The 2016 cohort completed the two-year program in 2018, and a new cohort immediately began. Alejandra then hired her first full-time employee to join her in growing the organization. Until this point, PIC was housed out of Uplift Education, and in 2019, Alejandra forged a partnership with the University of North Texas at Dallas (UNTD). PIC became a part of the UNTD Office of the President, hired its third employee, launched its third cohort of principals, and started a central office pilot called Leadership Lab. In 2020, PIC continued to operate within UNTD, added a part time coordinator and a program director/resident (me), and concurrently executed workshops for the 2019 cohort, 2020 cohort, and a new pilot program for Dallas ISD: The New Principal Academy (A. Barbosa, personal communication, June 1, 2020).

PIC’s newly adapted mission is, “to develop bold, equity-driven, and resilient education leaders who strengthen our public schools.” (Principal Impact Collaborative [PIC], 2020). PIC achieves this mission through the vision which states “all students will thrive in schools led by visionary, impactful and enduring leaders.” PIC works to solve the following problem: “On average, urban public school principals turn over every 2.5 years. This constant change in leadership, particularly at some of our community’s most challenging schools, makes it difficult to get traction on long-term academic improvements and for all students to be on a path to college and career readiness.” To address this, “PIC supports and develops public school principals to drive higher retention, improve leadership capacity, increase job satisfaction, and ultimately, student outcomes” (PIC, 2020).
This is achieved through three strands of development: (a) design thinking, (b) leadership development, and (c) wellbeing and resilience. The focus on design thinking promotes a principal’s ability to be more innovative and creative in solving problems and addressing inequities. The leadership development strand supports a principal’s ability to be effective in managing change and improving their school’s effectiveness. And the wellbeing work prioritizes a leader’s own health—physical, mental, and emotional—in order to build their resilience and personal effectiveness. PIC is unique from other leadership development programs in that it creates a cohort of principals who are like-minded and brought together to work collaboratively, to inspire one another, and to challenge each other. This cohort model creates a space where leaders can share and learn vulnerably and honestly due to the trust and camaraderie that is intentionally built (A. Barbosa, personal communication, June 1, 2020).

As of August 2020, the PIC team began operating with the following strategic plan which focused on continuing steady growth for their core program and pilots as well as increasing their workshop effectiveness and principal satisfaction (see Figure 1).

**Figure 1: The 2020-2021 PIC Strategic Plan**

![2020-2021 Strategic Plan](principalimpactcollaborative.png)

*Source: (Principal Impact Collaborative, 2020)*
Key Problem of Practice:

The largest leadership development organization in Dallas, Teaching Trust, announced its closure as of August 2020, leaving a significant hole in the local marketplace for principal leadership development, and a potential availability in philanthropic dollars. At the same time, the COVID-19 pandemic caused an increased need for principals to have high-quality crisis leadership development as well as an increased need for resiliency and self-care. Due to these factors, some district and community leaders asked PIC how they might meet this increased demand for leadership development, and encouraged PIC to collaborate with funders to do so. Due to its strong results and effectiveness in previous years, PIC was already expanding programming, and these contextual changes increased the urgency to do so at a faster pace than previously considered.

As PIC planned how and when to scale, it was also concerned about doing so in a way that supported the internal staff carrying out the work. The PIC team consists of five team members, all of whom are female—three are full time and three are mothers of young children. Due to COVID-19, the team is working from home full-time while also managing their personal priorities, such as caregiving. Prior to this year, the team typically worked from their offices at UNT Dallas to plan and prepare for workshops which were conducted in person at various locations throughout the metroplex. The team often relied on informal interactions to share knowledge and collaborate and had one weekly all-staff meeting. Feedback was usually centered around work products and did not address any interpersonal concerns. With the shift to an entirely virtual working environment and increased urgency to scale, the PIC team needed an approach that would create trust and open communication and result in increased learning and innovation, while also respecting the humanity of each team member without causing burn-out or turnover.
The problem of practice became: How might PIC strategically scale impact, grow the organization, and not burn-out its internal staff? Which leads to the following research questions: what factors contribute to successful scaling and growth in a startup? How does an organization create those elements? And how do growing organizations create sustainability for their employees?

Review of Knowledge for Action (RKA):

To answer these questions in this RKA, I first explore the literature on effective scaling to understand what elements lead to sustainable and successful organizational growth. Building from that literature, I argue that organizational learning is the key to efficient and successful growth. To understand how to create organizational learning, I turn to literature on “teaming.” In this research, I find that for individuals to team well, there are skills and mindsets that must be developed on the individual level, which requires understanding adult development and Deliberately Developmental Organizations. Synthesizing this learning, I argue that if PIC wants to grow and scale the organization’s business model (and thereby increase impact on schools and students), then it must create a culture in which all members can thrive and learn. If it wants each of its employees to learn and contribute to a learning culture, then each person needs to grow and develop as an individual. This personal growth and development will lead to increased growth at both the team and organization level, which will ultimately increase the overall capacity to continue to learn and take on new and innovative work.

Elements for Effective Scaling in Start-Ups:

First, I need to understand the most effective ways to scale PIC as an organization and increase impact. Gulati and De Santola argue part of scaling well is developing human capital: invest in your current employees and hire new people to take on more specialized work (Gulati & De Santola, 2016). However, as new people are
brought into the organization, often in higher ranks than those there previously, this can create fissions in the culture and trust of the organization. To avoid this, leaders should cultivate a learning mindset among all employees and harness their accumulated institutional knowledge. This learning mindset can be fostered by having clear goals, expectations, and systems that create efficient learning and decision-making. The authors believe “culture may be most important during periods of growth” (Gulati & De Santola, 2016). Employees need to feel motivated and inspired by the mission and purpose in order to “work across boundaries and engage in the spontaneous collaboration and exchange of ideas the company needs to innovate” (Gulati & De Santola, 2016).

While Gulati and De Santola (2016) also argue that the system must be set up to allow for individual learning, Anderson and Adams add that “the long-term success of any organization also depends on its ability to scale effective leadership as it grows” (2019, p. 33). In their experience, they have seen leaders fail to lead their companies because of a failure to grow leadership skills in each individual at the company, regardless of their managerial responsibilities. A leader cannot single-handedly grow their organization, they must do this through the work of others. The most effective way to create leadership growth is through “generative tension” by being vulnerable about both the organization’s areas of growth and their own personal development goals (Anderson & Adams, 2019, p. 35). In order to create an organization that is able to scale its size and impact, leaders will need a strategy focused on individual learning and leadership development at all levels which allows for organizational wide learning to occur (Gulati & De Santola, 2016; Anderson & Adams, 2019). For PIC to scale effectively, it will need to consider how it might create a culture where each employee can grow and learn and then share and codify that learning across the organization.
Teaming: Organizing to Learn:

One strategy PIC can use to ensure that individuals are learning and that leadership is developed at all levels is to borrow from effective teaming which can help to improve systems for learning and to create the trust and vulnerability needed for the people in the organization to learn (Edmondson, 2012). “Teaming is the engine of organizational learning,” and includes the ability to gather, analyze, and share new information using ongoing reflections from feedback and experimentation (Edmondson, 2012, pp. 14, 27). To create this learning, individuals must be able to “speak up, collaborate, experiment, and reflect” (p. 52). There are three key building blocks to teaming: “a supportive learning environment, concrete learning processes and practices, and leadership that reinforces learning” (Garvin et al., 2008).

The first building block, a supportive learning environment, includes creating a culture built on “psychological safety, appreciation of differences, openness to new ideas, and time for reflection” (Garvin et al., 2008). Psychological safety describes the trust and vulnerability required to create a culture where people are able to speak up, reflect on mistakes, and share critical feedback (Edmondson, 2012, pp.123–125). An organization that values and seeks out innovation needs a culture where people are able to share differing opinions, learn from failures, and engage productively in conflict. “Removing the fear of speaking up allows people to suggest the novel ideas and possibilities that are integral to developing innovative products and services” (Edmondson, 2012, p. 126). This is particularly important in supporting women and people of color who can be negatively impacted by stereotypes and biases when psychological safety is not present (Edmondson & Roloff, 2015, p. 50).

The second building block, concrete learning processes and practices, rests on the idea that “knowledge must be shared in systematic and clearly defined ways” across teams, departments, and functions as well as with external stakeholders and customers.
The authors suggest one of the most well-refined systems for this type of learning comes from the military After Action Review (AAR) process (Garvin et al., 2008). The AAR process provides structure for teams to reflect on an event or process and determine what went well, what needs to improve, and why (Garvin et al., 2008). But it is not enough to just conduct AAR’s; the types of reflection questions used matters as well. Argyris (1994) suggests that using “double-loop learning” during reflections and debriefs can promote divergent thinking and uncover insights that typical surface level questioning does not produce, because it asks questions not only about objective facts but also about the reasons and motives behind those facts” (Argyris, 1994).

The last building block, “leadership that reinforces learning,” explains that leaders set the tone for the culture of a company and must actively create a culture where learning can exist (Garvin et al., 2008). Leaders in power must visibly show that they value divergent thinking and new ideas in order to encourage employees to speak up and share out (2008). Leadership matters in creating psychological safety as those in power signal to others how open and vulnerable they are able to make themselves. Responding positively and with encouragement to challenges and problems will create an environment where others feel safe (Edmondson, 2012, p. 137). Leaders need to be “willing to display fallibility, acknowledge the limits of current knowledge, highlight failures as learning opportunities, use direct language, set boundaries, and hold people accountable for transgressions” (Edmondson, 2012, p. 139).

Other factors can also support organizational learning such as goal setting, investing people in the use of tools and systems (Milway and Saxton, 2011, Drucker, 1992). Milway and Saxton warn that organizations often struggle to learn due to “a lack of clear and measurable goals about using knowledge to improve performance; insufficient incentives for individuals or teams to participate in organizational learning
activities; and uncertainty about the most effective processes for capturing and sharing learning” (2011, p. 44). Drucker argues that companies must invest in the “tools of the knowledge employee” in order to capture the learning but the company must also understand that the tool is only valuable if the employee is actively using it (Drucker, 1992). He also suggests that knowledge must be valued equally across ranks. Traditional hierarchy which values management knowledge over subordinate knowledge will limit an organization’s ability to learn and thrive (1992). While psychological safety and trust are key to creating a learning culture, organizations must also consider these additional factors when creating systems to promote learning.

Ultimately, the research concludes that teaming requires high amounts of psychological safety, vulnerable leadership moves, an ability to engage in productive conflict and direct communication, and systems and structures designed for learning. PIC’s leadership will play a critical role in creating psychological safety by modeling vulnerability, sharing their own mistakes and learning, and celebrating when others speak up or share critical feedback. Adopting practices like the AAR into its regular work, like debriefing after workshops, PIC can create routines where learning is elevated and codified. As an organization who is looking to scale and innovate while honoring the humanity of its team members, PIC will need to create a culture of trust and psychological safety that allows for the adults to share candidly.

However, productive conflict, open vulnerability, and direct communication skills are not often well-developed in individuals. These are skills that do not naturally occur in adults, and require individuals “to reexamine previously hidden beliefs, assumptions, or mental models” that impede their ability to grow (Wagner, 2006, p. 221). Because PIC is trying to scale without burning people out, it will need to effectively team, which requires intentional shifts to create psychological safety and candor. Since these behaviors may not come naturally to people, each person will likely need to shift mindsets and learn
new skills. This leads to my next research question: how do adults learn, and what type of organizational culture and systems are needed to do this deep reflection and learning?

**Becoming a Deliberately Developmental Organization:**

One stream of research that has focused directly on this challenge of bolstering individual learning in the service of teams and organizations is the research on Deliberately Developmental Organizations (DDO). In this work, Kegan et al. (2016) employ adult development theory as the backdrop for creating organizational culture. Adult development theory posits that adults have the capacity for continued growth after the adolescent years (Lahey, 2018, p. 2), and a DDO assumes that the “continuing growth of the business comes through the continuing growth of its people” (Kegan et al., 2016, p. 162). By focusing on personal development, people in DDOs increase their abilities in service of the organization's mission. They do this by being in trusting relationships where they can expect to provide critical feedback and engage in learning with one another (Kegan et al., 2016).

A DDO consists of three dimensions: “Home,” “Edge,” and “Groove” (see Figure 2). Home is the environment and culture in which the developmental work occurs. Edge is the “developmental aspirations” of each person—the ways in which an adult wants to grow and improve. Groove is the “developmental practices” that exist to support and create developmental growth. Together, Home, Edge, and Groove mutually reinforce one another and create a deliberately developmental culture (Kegan et al., 2016, pp. 86–108).
So, if PIC needs to focus on individual development and growth in order to create additional capacity for the organization to grow effectively, then becoming a DDO may be a viable route to achieve this goal. Because PIC is currently composed entirely of women and is in the business of creating equity, it is important for the organization to first consider how to explicitly create a culture (Home) where fear of failure and mistakes is eliminated so that members feel able to take risks and speak up. As discussed above, psychological safety may be the key to creating the element of Home in the deliberately developmental framework, so that employees can value each other in their whole humanity and are able to show up vulnerably, so that they can learn adaptive skills (Kegan et al., p. 238). This culture must be “safe,” “dependable,” and “collectively ascribed to” and are created through collectively agreed-upon and “shared norms, agreements, and rules” (Kegan et al., pp. 275-276). Once these agreements are formed, they will inevitably be breached. How an organization responds to these breaches is how Home is truly created (Kegan et al., 2016, p. 277). The result of creating Home should
be an increase in psychological safety, so that individuals feel able to take risks such as speaking up and publicly learning from mistakes (Edmondson, 2012; Bohnet, 2016, p. 13). Given the recent shift away from informal in-person interactions to virtual, remote working, the PIC team will need to be deliberate in creating a new type of virtual “Home.”

The second element of the DDO framework is “Edge,” which is founded in the idea that “adults, not just children, can and need to keep growing” (Kegan et al., p. 87). DDOs do not focus on continuous improvement of the company, but on the continuous improvement of the people in it (p. 88). A person’s growing edges are their current “limitations,” which can be overcome in order to increase their own effectiveness (p. 92). In order for an organization to grow and innovate, team members will need to focus on their own growing edges, so they are able to adapt quickly, take on new responsibilities, and improve practices. To do this, giving and receiving critical feedback on each person’s Edge is vital and must become a part of the everyday culture and way of doing things (Kegan et al., pp. 78–79).

Kegan et al. (2016) argue that to improve on one’s edge, a DDO uses “grooves: developmental practices and tools” (p. 98). The “grooves” are practices, routines, and rituals that a company uses to support the developmental learning of each person (pp. 98–99). This can include meetings, performance evaluations, and even how people talk about their work (p. 98). Two practices shared in Kegan et al.’s research, which are pertinent to the work at PIC, are the “baseball card” from Bridgewater (p. 132), and the Immunity to Change Map (p. 203). The baseball card is a document that triangulates many data points on one person—such as personality assessments, feedback and testimonials from others, and assessments of their skill sets—and includes a t-chart showing where a person feels strong, their “rely-ons” and where they want to grow, and their “watch out-fors” (p. 132). This card is then shared publicly with others in the organization, allowing everyone to see transparently where a person is excelling and
where a person is growing, in turn allowing others to provide feedback and learning opportunities for each other (pp. 133–134). The ITC map is also a useful tool for supporting individual development. “The ITC approach… is the most focused, most functional, fastest, and least costly way …to get everyone engaged with her growing edge” by making connections between how you feel, act, and think (Kegan et al., 2016, p. 249). The ITC process can give everyone a way to identify their growing edge and ways to test it without overexposing their weaknesses (p. 249).

These are examples of practices that produce individual development but, particularly in the case of the baseball card, also create team and organization wide learning. As previously discussed, Edmondson suggests that for teams to learn, they must be able to engage in candor and disagreement (2012). Used effectively, the baseball card is a groove that requires exactly that. Because the baseball card is a public space where individual growth areas are shared, it requires self-reflection and psychological safety in order for an individual to feel comfortable completing it and sharing it with others. It also allows others in an organization to be able to provide useful feedback to their co-workers. And, as this feedback is shared, candor will be required and disagreement might occur. If an organization then integrates the use of the baseball card into routines, such as all-team meetings or one-on-one check ins, then conversations occurring about individual development will bring mistakes or learning edges to the surface for all to learn from them (Kegan et al., 2016, pp. 132–134).

An organization can go one step further by integrating whole organizational learning systems that bring the individual and team learning to the surface for everyone, such as the previously mentioned AAR model, which provides time and structure for all to learn (Garvin et al., 2008). By having systems—or grooves—in place, organizations are able to make learning a priority and ensure that it becomes a part of their day-to-day practices. This connects to the previous suggestions from Milway and Saxton as well as
Drucker, who argued the necessity for organization-wide systems and processes to create and codify learning on the macro level (Milway & Saton, 2011; Drucker, 1992). As a small organization, PIC has not previously developed these types of systems and will need to strategically build out grooves that support learning on individual, team, and organizational levels if they are to identify and transcend their edges. But first, they must start by creating *Home*: the container in which all of the developmental work will exist (Kegan et al., p. 108).

**Role of the Leader in a DDO:**

In creating a culture of learning and vulnerability, any organization—PICs included—will need to combat the socialized norms of hierarchy (Edmondson, 2012, p. 131). Kegan et al. argue the most effective way to create a DDO is for the leaders to be “as hard at work on themselves as they are on the performance of their business and the reliability of their cultures” (2016, p. 122). On her website, *Dare to Lead*, Brené Brown shares the sentiment that leaders have a responsibility to seek out and develop the potential of their people and their processes (Brown, 2020). In order to accomplish any of the aspirations described above, it is necessary for the organization to have a leader who sees potential in their organization and its people, actively develops them, and is equally committed to their own development as well.

Additionally, Edmondson argues that “the most successful leaders in the future will be those who have the ability to develop the talents of others,” who can also cultivate a culture in which people can thrive by “speaking up, learning from each other, and experimenting safely” (Edmondson, 2012, p. 285). But traditional hierarchical structures in organizations can hinder this type of development and learning, especially for those with lower status (Edmondson, 2012, p. 131). Drucker also supports this thinking, as he suggests every person in a company must be a responsible decision-maker and learner, not just the executives (1992).
The roots of hierarchical fear go back centuries. As humans, we are wired to respect the alpha and respond with fear in order to maintain existence (Edmondson, 2012, p. 132). In an organizational context, this often unconscious fear or respect of hierarchy can impede candor, especially for those on lower rungs. A specific example of how this manifest is when a leader speaks up first, with authority. This “often results in greater self-censorship by others, even if this was not the original intent” (Edmondson, 2012, pp. 131–133). To combat this, the leadership at PIC must actively work to create a culture in which speaking up, being vulnerable, and focusing on individual development becomes the norm, through modeling of their own vulnerability, celebrating developmental progress, and holding people accountable to the developmental culture.

Using learning and practices from DDO’s can aid PIC in creating a culture where adults are able to develop and grow in a culture based in candor. Each PIC team member will need to identify their own Edges, but given the need for increased candor and feedback in order to innovate and scale, they will need to focus their edges on these enabling conditions: candor, feedback, and conflict. PIC can consider integrating learning practices like the baseball card and AAR as potential grooves and should spend deliberate time developing psychological safety to create their learning container, or Home.

**Theory of Action:**

Based on the learning from this RKA, it can be concluded that an intentional shift toward individual development can impact team effectiveness, which will in turn create capacity for scaling. As PIC considers how and when to grow, it will need to purposefully create learning and codify that learning into new processes and systems. It must encourage a culture of vulnerability, open communication and feedback, and sharing of ideas, all resting within an accountability system that creates psychological safety for every individual. To do this, PIC must ground itself in organizational values and include
them explicitly in the mission and hiring and evaluation practices (Gulati & De Santola, 2016). PIC team members will also need to engage in direct conversations involving disagreement and critical feedback. And for PIC to be able to team (in order to learn in service of scaling), it will need to support and encourage its members to grow as individuals. Thus, individual adult development and a deliberately developmental culture become not only desirable, but necessary, resulting in the following theory of action:

If I create enabling conditions that allow for individuals to develop their ability and commitment to be more candid, provide critical feedback, and engage in productive conflict, then the team will become more high functioning, and then PIC, as an organization, will become more deliberately developmental, which will create increased capacity to scale.

**Strategic Project Description**

Based on this theory of action, my strategic project focused around improving an individual's capacity to candidly provide critical feedback and engage in conflict, as a means for the Principal Impact Collaborative to become more deliberately developmental and to increase capacity (see Appendix A). To do this, I focused on creating the three aspects of a DDO: home, edge, and groove, and integrated my learning about teaming, such as developing psychological safety and team learning practices. The following table in Figure 2 shows the activities and experiences I utilized, which were aligned to the “if” portion of my theory of action, and also aligned to home, edge, and groove.
**Figure 2: Activities and Experiences Aligned to If Portion of TOA**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Tools and Activities (Groove)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>If</strong> I create the enabling conditions (Home)</td>
<td>● Building the container activities: Journey Lines, Core Values, Sweet Spots</td>
</tr>
<tr>
<td></td>
<td>● Be Well Lead Well Analysis and Sharing</td>
</tr>
<tr>
<td></td>
<td>● Leader Vulnerability and Framing</td>
</tr>
<tr>
<td></td>
<td>● Weekly Routines: Mindfulness, Monday Hello and Friday Close Out</td>
</tr>
<tr>
<td></td>
<td>● Creation of PIC Principles</td>
</tr>
<tr>
<td>that allow for individuals to develop their ability and commitment to:</td>
<td>● ITC (as applicable)</td>
</tr>
<tr>
<td>-(Edge) Be more candid</td>
<td>● Baseball Card</td>
</tr>
<tr>
<td></td>
<td>● One on One Coaching Conversations</td>
</tr>
<tr>
<td></td>
<td>● Strategic Plan Stepback</td>
</tr>
<tr>
<td></td>
<td>● Be Well Lead Well Assessment and one on one coaching</td>
</tr>
<tr>
<td></td>
<td>● Creation of PIC Principles</td>
</tr>
<tr>
<td></td>
<td>● Workshop Debriefs</td>
</tr>
<tr>
<td></td>
<td>● Team Meeting Structure and Roles</td>
</tr>
<tr>
<td></td>
<td>● Stepbacks</td>
</tr>
<tr>
<td>-(Edge) Provide critical feedback</td>
<td>● ITC (as applicable)</td>
</tr>
<tr>
<td></td>
<td>● Giving and Receiving Feedback Workshop</td>
</tr>
<tr>
<td></td>
<td>● Baseball Card</td>
</tr>
<tr>
<td></td>
<td>● One on One Coaching Conversations</td>
</tr>
<tr>
<td></td>
<td>● Be Well Lead Well Debrief</td>
</tr>
<tr>
<td></td>
<td>● Giving and Receiving Feedback Workshops</td>
</tr>
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<td></td>
<td>● Creation of PIC Principles</td>
</tr>
<tr>
<td></td>
<td>● Workshop Debriefs</td>
</tr>
<tr>
<td></td>
<td>● Stepbacks</td>
</tr>
<tr>
<td>-(Edge) Engage in productive conflict</td>
<td>● ITC (as applicable)</td>
</tr>
<tr>
<td></td>
<td>● Be Well Lead Well Microactions</td>
</tr>
<tr>
<td></td>
<td>● Creation of PIC Principles</td>
</tr>
<tr>
<td></td>
<td>● Post Workshop Debriefs</td>
</tr>
<tr>
<td></td>
<td>● Team Meeting Structure and Roles</td>
</tr>
<tr>
<td></td>
<td>● Stepbacks</td>
</tr>
</tbody>
</table>

Because this work is interconnected, I will describe the work I did in three layers, but will also acknowledge certain activities or experiences that impacted other layers.

First, I focused on creating “home” through workshops and learning experiences to build trust and psychological safety. Second, I adapted existing—and created new—structures and routines to create “groove,” or opportunities to engage and transcend our “edges.” And lastly, I used our personal reflections and our structures, such as our weekly staff meeting, to support the team in identifying our edges.
Layer 1: Building Home:

During the summer months, I focused on creating psychological safety, trust, and vulnerability. Based on initial conversations with each team member, I understood that while the team worked together often and had developed some trust with one another, they hadn’t spent intentional time together to deeply understand their individual strengths, preferences, and work styles. We first began by taking an Enneagram assessment and engaging in a reflective conversation about our results, led by an external consultant in order to understand our personalities and preferences with a common tool and language. The Enneagram is a personality assessment that provides each person with a personality type that describes their personal tendencies—how they cope with and process emotion, view themselves in the world, handle conflict, and more (The Enneagram Institute, 2020). By identifying each of our types, we were able to share more about our preferences at work and what makes us feel valued and why. This knowledge helped the team to better understand why each of us worked in certain ways. We also completed a “sweet spots” activity, led by one of our teammates, where we identified the areas where we excel and enjoy (the sweet spot); areas where we don’t excel, but in which we want to grow; and areas in which we must operate, but don’t enjoy.

This created insights into which parts of our work where we felt the most competent; areas where we wanted more support or development; and the areas we needed—or hoped—to delegate or quit doing. We also shared our leadership journey lines, as a means for understanding our deeper “why,” which then connected to our next conversation about our personal core values. During the core values conversation, we connected our personal core values to our organizational values and were able to identify common values and unique ones. Lastly, we completed the Be Well, Lead Well
assessment and engaged in reflection with our consultant about our team profile, as well as our individual areas of strength and opportunities for growth. Be Well, Lead Well (bewellleadwell.com) is a framework that PIC used for our principal wellbeing content, so it was also helpful to experience the assessment and workshop as a participant.

Throughout these experiences, it became clear the team members were feeling overwhelmed by the amount of work on each of their plates and by the complexity brought on by COVID-19, as well as the intentional work they were doing to integrate racial equity into workshops. This led me to facilitate a conversation about what the culture currently was and what it needed to be, in order to ensure we were clear about our culture aspirations and we were bought into the work it would take to make the shift toward being developmental. Out of this, it became abundantly clear that the team cared deeply about producing high quality work, but felt overwhelmed by the amount of work and the diversity of skills needed to do so. They also shared a desire to be developed in a professional and personal way, and to be able to enjoy their work and their colleagues. They described this aspirational culture to be a place where they could get regular feedback and development, speak directly and candidly with one another, and maintain and prioritize their personal goals as well. They also want to see success in their current roles while working towards future professional goals (see Appendix B).

To build the team’s understanding of what a developmental culture is and why it might be the answer to our sustainability challenge, I introduced the team to the concept of a deliberately developmental organization through a book study on An Everyone Culture (Kegan et al., 2016). We used this to create a shared understanding of what adult development is, how to create a deliberately developmental organization, and then collectively decided on our first steps for creating “groove.”

After receiving feedback that the team needed more informal time with one another, given that remote working meant we had no typical “office chit-chat,” we
implemented a 15-minute meeting at the beginning of each week as a chance to say “hello” and connect in a personal way and an end of week meeting to close out and connect socially. One teammate also planned a virtual game night including all staff and partners.

In early January, I led the team through a two-part process to brainstorm and decide on our developmental principles. This conversation began as a way to create norms or agreements on how we would engage with one another with a developmental lens. It evolved into a co-created list of principles that we collectively agreed to uphold as a means to create a safe container where we can do difficult developmental work (see Appendix C).

Layer 2: Creating Groove:

I worked with the team to adjust a few existing structures and to create some new ones that served as our groove. These structures enabled us to grow home and address our growing edges. One existing structure was the weekly all-staff meeting. Before this change project, the team’s weekly meeting centered around sharing information, asking teammates to complete tasks, and occasionally giving feedback on work products. I used this already-existing meeting as a focal point for our initial culture shifts. I used a collaborative process to shift this meeting from transactional to developmental by ensuring the meeting was a place where each member could bring their full self, have opportunities to be vulnerable and share learning, and address their unique growing edges.

This structure continues to evolve with feedback overtime. At this point, the meeting starts with celebrations, personal connections, and mindfulness—further building home—and ends with the process-observer sharing feedback on our team effectiveness, based on our developmental principles—also building home, and at times refining edges. At least half of the time in these meetings we used to discuss challenges,
brainstorm ideas, and challenge our thinking, which provides opportunities for candor and conflict. We rotate the roles each meeting, so all of us have opportunities to facilitate and make decisions about how we connect and engage with one another, as well as refine our own facilitation skills. We use our PIC developmental principles as a way to give each other feedback at the end of the meeting—recognizing where we excelled, and where we need to improve. We also use these meetings as opportunities for learning, such as mini-workshops on developmental practices (i.e., giving and receiving feedback or “pinch sorting”), and opportunities to provide feedback on each other’s developmental edges. See Appendix D for a sample team agenda.

Further, I created two stepback routines as grooves, to engage and transcend people’s edges. One was a new post-workshop debrief structure modeled after the After-Action Review (Darling et al., 2005), which allowed us to provide critical feedback, think deeply about our leadership, and make decisions on how to grow and improve for the next workshop (see Appendix E). These occurred monthly after each workshop series and included the entire team when possible. The debriefs created an opportunity for each person to think deeply about the experiments they were running—such as new workshop content, like racial consciousness, or a new way to prepare a facilitator. We reflected on our own actions and decisions—what worked and what didn’t, and what we would continue or change for the following month. I also added a process for creating our strategic plan and reflecting on our progress throughout the year; we held one of these strategic plan’s “stepback” in November, we will hold another in April, and will begin the process again in June. These structures also served as additional ways to build home and refine edges.

Lastly, I adapted Bridgewater’s baseball card as our main structure for creating groove (Kegan et al., 2016, p. 133). This structure allowed us to integrate all of the work we had done to get to know each other and ourselves, such as our sweet spots and
Enneagram, in a way that kept them at the forefront of our work together and created a clearer way to identify our edges. To build psychological safety and model vulnerability through the process—which supported the building of home—the executive director and I completed our baseball cards first, shared them with the team, and provided feedback for each other in the moment. My intention was partly to start the process of creating the cards for the team, but more so to model how to give critical feedback in a team setting using the baseball card as a tool (see Appendix E). By the end of November, the other two teammates shared their baseball cards during a team meeting and the team provided feedback on their “watch out for”s and “rely on”s.

In October, the executive director and I began a series of one-on-one conversations, centered around our scaling strategy and accompanying organizational hierarchy and structures, resulting in the realization that we needed a new mission and vision statement. The executive director led the team through a series of conversations where the team was able to brainstorm and provide feedback on the new mission and vision. These conversations created opportunities for the team to be candid, to give critical feedback in the moment, and even at times to engage in productive conflict.

Throughout my change project, I met with each teammate one-on-one most weeks. These conversations allowed me to check in with each person on their development goals, what was holding them back, what support they needed, and to provide them with coaching. This structure also provided time for my teammates to give me feedback on my leadership and on our culture change work more broadly.

Layer 3: Defining Our Edges:

I began the pursuit of identifying our edges as an extension of our strategic planning conversations in early fall. I asked the team to create two types of development goals: (a) skills or knowledge that need to be developed to carry out the priorities they owned in the strategic plan, and (b) one improvement goal that was really important to
them and transcends work—something that would impact them as a whole person. I talked with each team member individually about what these goals might be and they worked on them individually. These conversations began before the team started their deep dive into understanding the nature of a DDO and before we created our developmental principles.

Through the process of creating the baseball card, sharing it during a team meeting, and getting feedback from the team on each person’s rely-ons and watch-out fors, each person was able to identify their developmental edges. This process brought clarity to each person on how they should be growing in order to be more capable in their work, and highlighted the need for further development on how to give and receive feedback effectively; this in turn led to a two-part workshop on feedback in early spring.

In November, as a part of a one-on-one development goal conversation, one teammate asked to use the *Immunity to Change* map (which she had read about in the book) to focus on her developmental edge. She used her one-on-one time to share her first three columns, and I used the criteria from our year-two PLIO ITC maps to probe her thinking. She shared that it made her nervous, “but in a good way,” and she was excited to use this tool as a way to grow in an area she felt would really benefit her both professionally and personally.

My change project was not linear, nor did it unfold in neat phases; instead it appeared to layer on itself and each new experience helped to build home, create a new groove, or define and refine an edge. As I introduced a new practice or concept, I used feedback from that experience to adjust my approach to meet the needs of my team. In the following section, I provide evidence for which parts of this culture change work were most effective, which were not as effective, and which don’t yet have clear results.
Evidence to Date:

In the following section, I will describe my evidence to date (as of February 2021). This includes inputs and outputs for the “if” side of my theory of change, and outputs and outcomes for the “thens.” My strategic project included several factors for the if side of my theory of change, including developing home and improving an individual’s ability to be candid, provide critical feedback, and engage in productive conflict. To understand our baseline, I conducted one-on-one interviews with each teammate at the beginning of the project and again at the end to measure our growth. I also used an anonymous survey conducted in February to understand our progress toward becoming a DDO and our level of psychological safety. This survey provided some insight to team culture at that moment in time and will be used for future teaming as a baseline, but does not have a direct baseline comparison for this particular project. I also used anecdotal observations and feedback shared in ongoing one-on-one check-ins and after workshops or meetings.

My theory of action assumed this work would result in increased team effectiveness, growth toward becoming deliberately developmental, and increased individual capacity, which could support scaling. To measure these results, I used a variety of methods, including one-on-one feedback conversations with each team member; anecdotal notes and observations; feedback shared during and after meetings; and evaluation of external programming and the results from the February anonymous team culture survey (questions and averages can be seen in Appendix G).

Because shifting culture and working toward a developmental orientation occurs over a long period of time, I expect our progress to continue and strengthen with time. Equally important to consider is the context in which this project occurred. As mentioned previously, PIC engaged in the challenging and complex work of culture change while also working in a fully virtual environment, as we navigated the personal challenges
caused by COVID-19. Throughout the following evidence sections, I will evaluate our progress toward the theory of action with these critical contextual pieces in mind.

Overall, the team made the most progress in developing our sense of home and psychological safety. We also made progress in developing our team edge in increasing candor, but only made limited improvement in providing critical feedback and engaging in productive conflict. At this point, we are becoming more highly functioning as a team and are more deliberately developmental, but are still in the initial stages with inconclusive data. I believe we are seeing impact on our capacity to scale, but as I will describe later in this section, this has been difficult to measure. These findings can be found in the following sections and charts (see Figures 3–10).

Evidence for the “Ifs”

The if portion of my theory of action is to create the enabling conditions to do developmental work. This included taking steps toward increasing psychological safety and building home. The evidence indicates that we have made significant progress toward this goal, as can be seen in Figure 3. The anonymous team culture survey resulted in an average of 3.55—on a scale of 1 (strongly disagree) to 5 (strongly agree)—on questions relating to psychological safety and building a sense of home. While there is no baseline number to compare these data to, it does evidence that the team is moving towards agreement on the psychological safety related questions. This was also evidenced in my one-on-one interviews with each teammate, in which one person shared, “the work we have done around our culture has propelled our work even further in the fact that we can show up authentically.”

We did this effectively through the team building activities that led to the culminating artifact of the baseball card. Members of the team specifically identified the process of creating and sharing their baseball cards as an impactful activity. Having an opportunity to integrate the relationship and trust building experience together assisted
in creating psychological safety and vulnerability. One teammate stated that “baseball card sharing felt a bit forced, but that's okay because it's practice in doing it. Might feel awkward at first. Sharing the cards helps to build home because it lets us get to know each other better.” It also provided an opportunity for the team to think about how their values, personalities, past experiences, and skill sets work together to create their areas of strength, rely-ons, areas of development, and their watch-out fors, (see Appendix E). By sharing these with each other, we were able to further build trust by deepening our knowledge of each other. This experience also helped us to better understand ourselves and our needs: “[t]he baseball card is really helping me figure out how to bring my whole self to the table,” another team member shared with me. “I am a work in progress but I don’t have to be perfect or have to have this persona.” Prior to this experience, the team provided feedback that many of the activities to build home had felt disjointed and there was concern that they would not be carried forward or integrated into our everyday work, so this tool also supported the conditions to enable developmental work by integrating all of our activities intended to build home.

The creation and use of our PIC principles further evidences our significant progress in creating home. These principles are agreements and commitments to one another for what we believe must be true about our culture from a developmental perspective (see Appendix C). The principles are used to give one another feedback and set the tone for all of our developmental work, further building the container, or home. They are a key enabling condition; without them, there is no clarity on how we expect to engage with one another, but with them, we are able to strive toward a specific type of developmental culture, created for us and by us where we are able to hold one another accountable.

Lastly, evidence suggests the enabling conditions were further developed by adding structures that allowed for personal connection. While working in a virtual
environment, these were particularly important. Our weekly all-team meeting includes 10–20 minutes of reflection, mindfulness, breathing, intention setting, etc. The roles for these meetings, including who facilitates, are on a rotating schedule, which allows every team member to plan our connection time. We also added additional time for us to engage with one another outside of work conversations, through our weekly “hello” and “close out” meetings, which created a further sense of safety and a way to know each other. While these structures have helped, there is also evidence that they are not enough, especially due to our virtual working environment and quick growth: as one team member shared, “[t]he Monday and Friday time has made me feel more open with people and has helped create a trusted space. But I need more time to just hear from others on what they are working on. We have to be really intentional about how to keep everyone in the loop and create transparency when we are all virtual.” The evidence for the impact of these structures can be seen in the below table (see Figure 3).

**Figure 3: Evidence for Progress Towards Theory of Action**

The following charts outline my theory of action, progress toward each of the ifs and thens, and evidence to support. On this chart, green indicates significant progress, yellow indicates some progress, and red indicates little-to-no progress.

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progress</th>
<th>Tools and Activities (Groove)</th>
<th>Evidence - Before</th>
<th>Evidence - After</th>
</tr>
</thead>
<tbody>
<tr>
<td>If I create the enabling conditions (Home)</td>
<td>Green</td>
<td>• Building the container activities: Journey Lines, Core Values, Sweet Spots</td>
<td><em>June 2020 one-on-one interviews</em></td>
<td>February 2021 one-on-one interviews, post-session feedback, check-in feedback, anecdotal observations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Be Well Lead Well Analysis and Sharing</td>
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<td>• Leader Vulnerability and Framing</td>
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<td></td>
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<td>• Weekly Routines: Mindfulness, Monday Hello and Friday Close Out</td>
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<tr>
<td></td>
<td></td>
<td>• Creation of PIC Principles</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>&quot;When I started, I wasn’t sure if we were deliberate about our culture. I didn’t see it boldly or clearly happening and the pandemic made us have to focus on the work and surviving. Some of our partners had to let people go and we just had to stay above water.” —participating member</td>
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<td></td>
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<td></td>
<td>&quot;Creating our principles did a lot for helping me reframe how to keep from getting to destructive conflict. When I think about instances where it has happened in the past, if those people had that framework in the past, then maybe I wouldn’t have felt wronged, or maybe I would have made less of the mistakes.”</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>&quot;Team time is invaluable — and so nice:).”</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>&quot;It’s been helpful having a thought partner in the process. I don’t feel alone in my role because I have support. When I am questioning my own leadership, I feel</td>
<td></td>
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</tbody>
</table>
I have seen some progress toward my goal of increasing candor among the team, as evidenced in the chart below (see Figure 4). During one-on-one interviews, the team rated themselves an average of 3 on how candid they felt they were prior to the beginning of this change project (0 = not candid at all, 5 = completely candid). In February, the team’s self-analysis increased to 3.75. In February, the team averaged a 3.44 on anonymous survey questions relating to candor (scale: 1 = strongly disagree, 5 = strongly agree). Given no baseline, these data show the team is trending toward more candor, but is not conclusive. Anecdotal observations supported the self-analysis, particularly through an increase of voices during our weekly all-team meeting. There has also been an increase in positive recognition when candor is present, as well as more candor in external meetings with principals and partners. For example, one teammate gave positive feedback to another after she had shared for the first time in a team meeting, “I appreciate your self-awareness and candor—thank you for sharing it, I learn so much from you when we are hearing you share.” Candor in my one-on-one check-ins has also increased as teammates have grown more effective at self-reflection and feel more psychologically safe to share what is holding them back. For example, a teammate shared, “I’m improving but there are instances where I just want to be an observer or learner, sometimes something sparks with me and I can associate to it. I consistently tie what we are doing to other experiences I have had. But, there’s a little stubborn part of me that just wants to listen. Maybe I am expecting something to validate the thought I have. I think it needs more and I need to hear other people’s thoughts, first.”

However, there is also evidence that while we are making progress toward being more candid, we still have room to grow, as can be seen in Figure 4. For example,
during the one-on-one interviews in February, a few of the themes shared with me indicated that some teammates struggle with being candid depending on certain variables, such as who they are speaking with, whether their opinion has been solicited, the hierarchy and organizational structure of the team, and their own confidence or knowledge of the topic or project.

**Figure 4: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progress</th>
<th>Tools and Activities (Groove)</th>
<th>Evidence - Before <em>June 2020 one on one interviews</em></th>
<th>Evidence - After <em>February 2021 one on one interviews, post session feedback, check in feedback, anecdotal observations; February Team Culture Survey</em></th>
</tr>
</thead>
</table>
| that allow for individuals to develop their ability and commitment to:  | (Blue) | - ITC (as applicable)  
- Baseball Card  
- One-on-one coaching conversations  
- Strategic Plan Stepback  
- Be Well Lead Well Assessment and one-on-one coaching  
- Creation of PIC Principles  
- Workshop Debriefs  
- Team Meeting Structure and Roles  
- Stepbacks | On a scale of 0-5 (0 = not candid at all, 5 = completely candid), how candid were you?  
Team Average = 3  
What holds you back?  
- Hurting someone’s feelings  
- Unclear of my authority  
- My own confidence  
- The other person’s previous reactions  
- Hierarchy and power dynamics  
- Lack of knowledge and experience | On a scale of 0-5 (0 = not candid at all, 5 = completely candid), how candid are you?  
Team Average = 3.75  
Team Culture Survey:  
On a scale of 1-5 (1 = strongly disagree, 5 = strongly agree),  
Team Average on Candor Questions = 3.44  
What holds you back?  
- Differs based on who I am talking with  
- Easier when I am asked for my opinion vs. unsolicited  
- Less comfortable with candor upward  
- Pandemic and virtual working makes everything harder  
- Mentally/psychologically in a challenging space right now  
- Lack of background information on the topic or project  
- Concern it might create anxiety for others |

The evidence I collected in the one-on-one interviews suggests that the team’s perception of our comfort in giving critical feedback has increased from an average of 1 to 2.63, as can be seen in the below table (see Figure 5). And, on our February team culture survey the team averaged a 3.25 (scale of 1 = strongly disagree to 5 = strongly agree) on both questions: In the last month, have you given critical feedback? And, in the last month, have you been asked for critical feedback? This indicates that some critical feedback is being exchanged, but there is also overwhelming anecdotal and
observational evidence that it is not happening consistently. While there seems to be a decrease in anxiety around giving feedback, I have not seen strong evidence that it is occurring more regularly yet, which is why I have coded this enabling condition as having made some progress. However, I did see evidence that there was an increase in providing positive feedback. The evidence also suggests that giving critical feedback might not actually be the right enabling condition; rather, asking for critical feedback might be more useful.

It appears the baseball card was the most impactful tool to increase feedback, as the team now has direct insight into their teammates’ growth areas, and can align feedback to these edges. For example, a teammate shared the following feedback at the end of a brainstorm session, “Just wanted to share—great job in yesterday’s team meeting. You did a great job offering feedback on the alumni impact brainstorm. Really loved how you found some constructive ideas to offer on how we evaluate and measure the value of the peer network and equity growth. I know this is something you’ve been working on in your ‘watch-out-fors’ so really appreciated you leaning into the growth.”

The baseball card also provided an opportunity for team members to do a deeper dive into what might be holding them back from giving critical feedback, as they crafted their “watch out fors” and then got feedback from teammates in return. We were able to ask questions of each other, such as: “What type of feedback do you struggle with most?” and “Why do you think that is?” These questions allowed the individual to craft a more specific watch-out-for and also allowed teammates to give more tailored feedback. “The baseball card feedback made me narrow in on what parts of feedback I am uncomfortable with,” said one team member. “I can give actionable and targeted feedback on work products when I am asked for it. Where I struggle is giving feedback on someone’s personal leadership, which I think may offend them. My ‘watch-out-for’ is giving unsolicited feedback. But, if you ask me for my feedback, then I can give it to you.
I can give a more nuanced reflection on where I struggle with feedback having been through the baseball card."

Because the team all identified feedback—in some form—as an area of growth, I provided a "giving and receiving feedback workshop," which was one of the more impactful learning sessions in improving this enabling condition. During a one-on-one interview, the following reflection was shared indicating an increase in self-awareness about the need for asking for feedback: “I'm not sure if my feedback is being delivered more effectively. The awareness that I need to grow in it and support in doing it minimizes some anxiety, but not all. It's a step in the right direction. I'd like to hear from my teammates if I have grown.”

Individual team members described a variety of reasons for why they still hold back on critical feedback, including not feeling safe with someone who is higher in the hierarchy, not as comfortable with interpersonal feedback versus work product, and negative experiences in the past where critical feedback wasn’t received well. One reflection was shared between the giving and receiving feedback workshops, which highlighted the need for asking for feedback rather than sharing. This teammate shared that when asked for their opinion, they felt comfortable giving it, regardless of the subject, but when expected to give feedback, especially to a supervisor, it was much more difficult to do so. In fact, it felt to this teammate like I was putting the onus of critical feedback on the lower ranks of the organization, since it is a manager’s responsibility to give critical feedback anyway, and this didn’t feel like the most effective way to increase critical feedback. After this reflection, I began to reframe our enabling condition of increasing critical feedback: instead of expecting unsolicited critical feedback, we used the giving and receiving feedback workshop as a way to increase the amount of times we were each asking for critical feedback.
Additionally, the team shared during one-on-one interviews and check-ins how our context of working in a fully-virtual environment while navigating the pandemic also limited their ability to give critical feedback. For example, one person shared, “I have been struggling with giving critical feedback, even though I know I should share it and I know I have good intentions. Time is also not on my side. There's no time to just quickly give the feedback. I know it's meaningful, but I'm not so sure if there is time to really digest and talk through the problem. I'm not sure how to find the right timing of when I should give critical feedback.” Two teammates also shared they found it difficult to give critical feedback to someone else, when either they were feeling less emotionally well or worried the receiver was not emotionally well due to the volatility caused by the pandemic.

**Figure 5: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progres</th>
<th>Tools and Activities (Groove)</th>
<th>Evidence - Before <em>June 2020 one on one interviews</em></th>
<th>Evidence - After <em>February 2021 one on one interviews, post session feedback, check in feedback, anecdotal observations</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>- (Edge) Provide critical feedback</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- ITC (as applicable)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Giving and Receiving Feedback Workshop</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Baseball Card</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- One-on-one coaching conversations</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Be Well Lead Well Debrief</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Giving and Receiving Feedback Workshops</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Creation of PIC Principles</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Workshop Debriefs</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>- Stepbacks</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>On a scale of 0-5 (0 = not comfortable at all, 5 = completely comfortable), how comfortable were you with giving critical feedback?</td>
<td>Team Average = 1</td>
<td>Why?</td>
<td>Comfortable with going against someone’s ideas or telling them they should think differently</td>
<td></td>
</tr>
<tr>
<td>Team Average = 1</td>
<td></td>
<td></td>
<td>Comfortable with work product feedback, but still think very carefully about my words</td>
<td></td>
</tr>
<tr>
<td>Team Average = 1</td>
<td></td>
<td></td>
<td>Lack of knowledge and experience</td>
<td></td>
</tr>
<tr>
<td>Team Average = 1</td>
<td></td>
<td></td>
<td>Perceived competition with teammates</td>
<td></td>
</tr>
<tr>
<td>Team Average = 1</td>
<td></td>
<td></td>
<td>Lack of experience with giving feedback to a peer</td>
<td></td>
</tr>
<tr>
<td>On a scale of 0-5, (0 = not comfortable at all, 5 = completely comfortable) how comfortable are you with giving critical feedback?</td>
<td>Team Average = 2.63</td>
<td>February Team Culture Survey:</td>
<td>Scale of 1-5 (1 = strongly disagree, 5 = strongly agree), in the last month, have you given someone critical feedback?</td>
<td></td>
</tr>
<tr>
<td>Team Average = 3.25</td>
<td></td>
<td></td>
<td>Team Average = 3.25</td>
<td></td>
</tr>
<tr>
<td>Team Average = 3.25</td>
<td></td>
<td></td>
<td>Why?</td>
<td></td>
</tr>
<tr>
<td>Team Average = 3.25</td>
<td></td>
<td></td>
<td>Growth came from our conversation about principles which gives me language to where I feel less intimidated and don’t worry as much that history will repeat itself</td>
<td></td>
</tr>
<tr>
<td>Team Average = 3.25</td>
<td></td>
<td></td>
<td>Feel most uncomfortable with feedback that is interpersonal, for example if I feel my time hasn’t been valued, it’s difficult to say that</td>
<td></td>
</tr>
</tbody>
</table>


According to my one-on-one interviews, the team’s perception of productive conflict occurrence has grown from an average of 1.67 to 2.75, indicating that we have made progress in this enabling condition as can be seen in Figure 6. Additionally, according to the anonymous culture survey in February, the team averaged a 4 on a scale of 1 (strongly disagree) to 5 (strongly agree) for the question, “Are members of this team able to bring up tough issues and problems?” The team also averaged a 3.33 on the question, “Do you feel safe telling your leadership when you disagree with what they think?” As mentioned previously, this survey did not have a baseline, but indicates a positive perception that people can speak up about difficult topics, which could result in conflict. However, due to a lack of other evidence to support this perception, I have coded this as having some progress. While I have found the team is feeling less anxious about conflict and more able to identify when it is happening, there is not substantial evidence that conflict is happening more consistently. I have observed—and several members of the team have reported—that the increase in structured reflection conversations, such as workshop debriefs, curriculum planning, and the strategic planning step back increased the moments of productive conflict. We sometimes engaged in debate during the brainstorm and problem solving time of our weekly all-staff meeting. I saw an increase in challenging one another’s ideas when we are discussing a potential proposal or debriefing a workshop. However, I also discerned from interviews
that perceived hierarchy structures impede their ability to directly contradict other teammate's ideas, in addition to not knowing enough about a new project, or how far along another person might be in the project timeline. Some teammates feel we still have a culture of being overly polite, need more accountability to complete next steps after a conflict, and acknowledge how difficult it is to engage in conflict if they are feeling anxious or depressed for other reasons, such as the impact of the pandemic.

The strongest evidence that we have started to make progress in this area is in decreasing individual anxiety when conflict does arise. For example, a team member shared, "I can tell that I have grown in awareness—in the sense that if I am stepping into a conversation, I can name that it is a productive conflict. That is something that I would typically be anxious about. I can think, okay, this is probably productive conflict versus just a problem. I think I have marginally gotten less anxious around those conversations. I can now catch myself feeling anxious about a candid conversation or critical feedback and know I need to grow in it."

**Figure 6: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progres</th>
<th>Tools and Activities (Groove)</th>
<th>Evidence - Before</th>
<th>Evidence - After</th>
</tr>
</thead>
<tbody>
<tr>
<td>-(Edge) Engage in productive conflict</td>
<td></td>
<td></td>
<td> </td>
<td><em>June 2020 one on one interviews</em></td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td> </td>
<td><em>February 2021 one on one interviews, post session feedback, check in feedback, anecdotal observations</em></td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● ITC (as applicable)</td>
<td>On a scale of 0-5 (0 = not at all, 5 = occurs often), how often did productive conflict occur? Team Average = 1.67</td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● Be Well Lead Well Microactions</td>
<td>Why?</td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● Creation of PIC Principles</td>
<td>● Personality style — desire to be helpful and non-confrontational</td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● Post Workshop Debriefs</td>
<td>● Didn’t have a structure or practice to resolve conflict when it did occur</td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● Team Meeting Structure and Roles</td>
<td>● No opportunity to pause and reflect on past moments of conflict</td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td>● Stepbacks</td>
<td></td>
</tr>
<tr>
<td> </td>
<td></td>
<td></td>
<td></td>
<td>On a scale of 0-5, (0 = not at all, 5 = occurs often) how often does productive conflict occur? Team Average = 2.75</td>
</tr>
</tbody>
</table>

**February Team Culture Survey:**

On a scale of 1-5 (1 = strongly disagree, 5 = strongly agree), are members of this team able to bring up tough issues and problems?

Team Average = 4

On a scale of 1-5, do you feel safe telling leadership when you disagree with what they think?

Team Average = 3.33

Tell me more:
Would like more opportunities to engage in collaborative conflict, nature of virtual makes this happen less frequently and organically

Step backs, workshop debriefs are good opportunities for this, but could spend more time collaborating on changes for the future

Struggling to be well on a personal level, which makes engaging in conflict even more challenging

Need more accountability and follow up on agreements that come out of our conflict

Hierarchy impedes ability to engage in conflict

We build on ideas, but we don’t debate them

Sometimes it feels like we are being too polite

Evidence for the Then’s:

We have made some progress on increasing our team effectiveness as can be seen in the chart below (see Figure 7). Structures such as our team meeting agenda and rotating roles, debriefs, regular check-ins, and internal workshops have increased our efficiency in communication and sharing of ideas, as well as pushed the team to implement feedback and changes quickly into our programming. Our team was able to continue working at a high level of effectiveness while one teammate was out on leave. And, due to our increased level of candor, we are able to have more direct conversations with one another, to get to the heart of matters quickly. We have also been able to maintain—and in some areas, increase—our external effectiveness, even in spite of shifting to a fully-virtual environment, which I assume is partially a result of our increased team effectiveness.

The team shared their own personal reflections during the interviews, which indicated their individual improvements on being a good teammate, and in turn, improved our team’s functioning. The following quotes from team members also highlight
a keen sense of being on a developmental journey and a desire to continue to grow and improve on our team effectiveness.

My goal edge is to be more assured that the decisions or moves I make are what the program needs or the project needs, and are fitting within the norms we just created, but also aren't always the way we've always done things. I feel like I am getting more confident in pushing back when I think we could do things differently and not reinvent the wheel. I feel more confident in myself. I have done work towards that but still there’s a lot of work to be done. —Team member 1

My ability to be more confident and assured in my decisions directly impact the team. If I am not willing to stand on something I feel strongly about, push back, or offer different ideas, then it doesn't develop the people around me and doesn't push the work forward. A lot of the things that I lead, other members aren't necessarily in them, so it could do a disservice if I am not confident when I share, because others aren't working on it, so if I'm not doing it in a way that's confident, it would be detrimental to our work and our brand. It's not just about my development, it's also true when I work with my teammates. When I give feedback that isn't just tactical but is also critical, then I can help her grow.

—Team Member 2
Additionally, on the team culture survey as referenced in Figure 7, the team averaged a 3.54 on a scale of 1 (strongly disagree) to 5 (strongly agree) on the questions related to teaming and psychological safety. While these results are a snapshot in time, they do indicate the team is leaning in a positive direction in terms of building psychological safety and becoming more highly functioning.

**Figure 7: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progress</th>
<th>Evidence - After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Then the team will become more highly functioning,</td>
<td>February Team Culture Survey: Scale of 1-5 (1 = strongly disagree, 5 = strongly agree) Team Average on Teaming (Psychological Safety) Questions = 3.54</td>
<td></td>
</tr>
</tbody>
</table>

“...I've grown in my ability to be reflective because I have been given the space to do it through the work you have led. What I'm not sure I am aware of enough yet, is to know how that's helped me grow. I take the time to think through what I am bringing to the work, when I am holding back, my interpersonal interactions, and how I am showing up at work or not. I have been given the space to reflect a lot more, which has helped me grow, but I can't necessarily name what it is impacting yet.”

“I've been able to own or identify my voice with respect to the work we do and among our team. Being able to see what I contribute in action is helpful. My sense of wondering has improved, breaking outside of a mold of thinking I had before. It's been really helpful in team meetings, even having considerations pulled out of me — others asking for my opinion. It probes me in an area where I might not have contributed, but once I do, it feels good.”

We have also made some progress on our journey to becoming deliberately developmental, as can be seen in the chart below (see Figure 8). On the team culture survey, the team averaged a 3.54 (scale: 1 = strongly disagree, 5 = strongly agree) on the questions relating to becoming deliberately developmental. These results do not have a baseline to compare, but show that the team is moving toward becoming more developmental. Based on evidence from observations, conversations, and interviews, I conclude we have made more progress on developing home as previously described, than on improving our edges of candor, feedback, and conflict. Teammates have shared that they have an increased awareness of their edges and practices to develop them, a
commitment to grow one another, and an increased sense of vulnerability and safety in sharing mistakes. However, this has not yet translated fully into the team’s ability to give one another direct feedback or to engage in healthy conflict at appropriate times.

We have demonstrated an increased ability to be open and honest about mistakes, which evidences that we are becoming more developmental. As one teammate stated: “I can definitely share my mistakes. I had to come to terms with, if I am making a mistake, I just have to voice it and ask for help. Asking for help was hard, because I didn't want to be a burden, I wanted to figure it out on my own, but how can I do that on my own? I need to be able to learn how to take care of it in the future, so when it comes up again, I am more equipped.” Another teammate reflected on the impact of focusing on their edge of improving: “if I am working on feedback and being candid, that should help my teammates in their growth, because I am openly sharing with them versus holding it back. Hopefully by sharing vulnerably what I am working on in my development, it helps others to do the same.”

Becoming a deliberately developmental organization is a lengthy process, and while we certainly haven’t arrived at being developmental, team members recognize the benefits and are able to identify that we are progressing. For example, “It’s helped for us to talk blatantly about our desire to grow in feedback and candor. Knowing that we all had that as growth areas, being on this journey together, we are calling it out as an intentional thing we are trying to do. It’s a collective growth opportunity and I’m not alone in this.”

There is evidence of a lack of accountability and the need for more clarity about what it looks like to actually be developmental. A teammate shared with me during the interviews a specific reflection about how to use our baseball cards more effectively. “On our baseball cards—we need to hold one another accountable. What are the best ways to keep everyone’s watch-out-fors at the forefront, while having a natural discussion? We
could also take work that we are doing and have our own internal training to share what we know with each other.” This evidence shows that we haven’t yet engrained the baseball card into our everyday practices and culture.

**Figure 8: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progress</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 2021 on one on one interviews, post session feedback, check in feedback, anecdotal observations, February 2021 Culture Survey</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

and then PIC, as an organization, will become more deliberately developmental

**February Team Culture Survey:**

Scale of 1-5 (1 = strongly disagree, 5 = strongly agree),

Team Average on DDO Questions = 3.54

“I created the watch-out fors in my baseball card, but haven’t yet narrowed in on what the things that I just need to watch out for and hold myself accountable to are, and what are areas where I need an actual goal around, so that I’ll push myself in that area.”

“I am more receptive to talking about my areas of growth verbally and indirectly, and seeing everyone else just as transparent has been helpful. The baseball card has been particularly helpful, to make those connections to others. So much of this work can be done in a silo, so it’s helpful to have a safe space to feel comfortable sharing.”

“I still feel some anxiety about sharing my growth edges, but it doesn’t hold me back from doing it.”

Additionally, to understand the change we are seeing in becoming developmental, which is a shift in our culture, evidence can be drawn from a reflective exercise where the team described our culture in September 2020 (on the left in Figure 9, below) and in late January 2021 (on the right). The culture at PIC continues to be mission and purpose-driven, organic, informal, and personal, and focused on high-quality work products. The most significant difference is some increase in trust and vulnerability, and fewer comments about work volume and feeling stretched thin—but perhaps a heightened awareness of hierarchical structures.
Figure 9: Evidence of Shift Towards a Developmental Culture

<table>
<thead>
<tr>
<th>Team Description of Culture as of Sept. 2020</th>
<th>Team Description of Culture as of Jan. 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Casual, comfortable, organic</td>
<td>● Empathetic, relaxed, thoughtful, mindful</td>
</tr>
<tr>
<td>● Genuinely care about each other as people</td>
<td>● High standards</td>
</tr>
<tr>
<td>● High expectations, especially for external</td>
<td>● We can show up authentically — we all</td>
</tr>
<tr>
<td>facing documents and products and workshops</td>
<td>care about each other as human beings,</td>
</tr>
<tr>
<td>● Operate thinly/scrappy/everyone helps</td>
<td>but also all take our work seriously</td>
</tr>
<tr>
<td>● Virtual setting limits informal interactions</td>
<td>● Mission Oriented</td>
</tr>
<tr>
<td>with each other and partners</td>
<td>● Mostly open and transparent convos with</td>
</tr>
<tr>
<td>● Mission oriented</td>
<td>one another</td>
</tr>
<tr>
<td>● Optimistic &amp; Constant Learners</td>
<td>● Built a strong foundation of trust</td>
</tr>
<tr>
<td></td>
<td>● Safe space to be vulnerable and show</td>
</tr>
<tr>
<td></td>
<td>up as you are</td>
</tr>
<tr>
<td></td>
<td>● Very collaborative</td>
</tr>
<tr>
<td></td>
<td>● Not restrictive in our ability to share</td>
</tr>
<tr>
<td></td>
<td>our opinions and our backgrounds and</td>
</tr>
<tr>
<td></td>
<td>those contribute to our learning and</td>
</tr>
<tr>
<td></td>
<td>our output</td>
</tr>
<tr>
<td></td>
<td>● Ambitious</td>
</tr>
<tr>
<td></td>
<td>● Still some insecure overachiever</td>
</tr>
<tr>
<td></td>
<td>tendencies</td>
</tr>
<tr>
<td></td>
<td>● Learners</td>
</tr>
<tr>
<td></td>
<td>● Hierarchical feelings/tendencies</td>
</tr>
</tbody>
</table>

My theory of action suggests that the previously discussed evidence should impact PIC’s ability to increase internal capacity to scale. There is early evidence (see Figure 10, below) indicating this is beginning to be true—although it is still unclear to what extent, and perhaps too early to tell conclusively (thus I have coded it red, showing only minor progress. Collecting evidence for increased capacity has been challenging, so I have used personal reflections on individual capacity, results from the team culture survey, evidence of joy as capacity building, and examples of new workstreams, to understand to what extent this change project ultimately increased capacity to scale.

In one-on-one conversations, the team reported an understanding that their personal development work directly connects to their teammates’ ability to do their work effectively and, in turn, supports the overall effectiveness of the organization. One teammate also reflected during the one-on-one interview that as we continue to create “clearer lanes and more balance ...that will make us a lot more effective.” The team shared many reflections that indicate an individual understanding and belief in developing themselves on the individual level in order to increase their own capacity and the capacity of others.
These skills support PIC’s ability to scale and grow. For example, one teammate shared that “[i]t’s a rising tide, for the organization to grow, the people in it need to be growing. It’s a responsibility for all of us to be pushing ourselves, so that we are growing and the organization is growing. If I grow in my ability to give feedback, or speak up when I am feeling pinched, then we’ll get to the real work faster. It moves how I do my work forward and helps others move their work forward. The work collectively increases.” Another teammate reflected on how their growth edge directly supports their work. By growing this edge, they are able to be more effective in their role, “When I work on my growth edge of being too humble, it ties back to being able to grow the organization and to get more funding.” As this person improves their confidence through candid feedback from teammates, they are also able to be more candid and bolder with funders. This improves their capacity as they are no longer wasting time being anxious about funder conversations, or having redundant conversations with a funder.

On the team culture survey in February, several questions could have a potential impact on team capacity, as seen in Figure 10 below. These questions show the team is directionally agreeing they are able to take risks, ask for help, bring up tough issues, accept differences, and value and utilize unique talents. These skills and abilities might increase a person’s individual capacity by limiting the amount of anxiety or fear they have when needing to speak up and limiting the amount of time a person spends covering up a mistake or over-analyzing their work. Additionally, these measures indicate a positive sense of psychological safety, which will improve a person’s ability to give and receive feedback and will support the growth of individual edges. For example, when a teammate gave me feedback on one of my growth areas—of thinking through and acknowledging the details that a new project requires before agreeing to pursue it—I was then clearer about who would do what, when, how, and with what support. This resulted in the team and me having more capacity to do the work, because we were able
to get right into the conversation of details and didn’t duplicate efforts (while limiting everyone’s anxiety).

Shawn Achor’s research on happiness shows there is a positive correlation between having a positive view or mindset and being more effective. “When your brain is positive it actually achieves more than it would have otherwise” (Achor, 2010). I have also seen evidence of this from team mates. When our team is happy, excited, and feeling positive about their work, they are more likely to be effective, grow and take on the challenges of their own and other’s development work. The following quote shows how this might be true:

“My teammates fill my cup. I see their passion and when they have a great work product or a great idea, it fuels and reinforces to me a leadership principle I have, which is to surround yourself with talented people. I don’t get a ton of feedback from every person on the team, which makes me think about how I can solicit it in a better way. But I learn from my teammates and they have reminded me to appreciate styles and behaviors that are so different than mine. They help me be open minded about different styles. One of my teammates puts the mirror up to my leadership more, which really helps me grow. And another is really intentional about giving me feedback and pushes. —Team Member

The evidence also points to additional growth edges that could improve team effectiveness and increase capacity, which PIC might consider in the future. For example, there is a need to create streamlined systems that would in turn increase capacity. “We could be more systems driven instead of reinventing the wheel each year. We do the same things, but if we had a system, we wouldn’t need to do that. So then we can dig deeper and not have to organize everything each time. Like, knowledge
management—this has gone well for teaming—I constantly go back to the same place to
find those resources, but it's an area of growth for our core program specifically. That
would help build capacity. We need to continue working on productive conflict and
critical conversations. I'm still struggling with that, specifically with people who are higher
on the ranking order than me." The evidence shows a need to improve on the ability to
prioritize and be smarter about how time is spent. Another teammate shared, “I’m not
sure if we are focusing our energy on the right things. We all have an opportunity to
prioritize better and be more intentional about our time. We carry insecurity in our work
that creates unnecessary anxiety and mental energy waste. If we limited those
insecurities, could we free up mental capacity?”

My theory of action posits that we would increase our human capital capacity
through this change project, resulting in increased work without burning-out our people. I
do not have evidence to say that this is emphatically true or not, but we have been able
to submit several new proposals with districts and organizations for pilots and workshops
throughout the year. Two of these have been accepted, resulting in a new series of
design-thinking workshops for social entrepreneurs and another for a community
partner. We are also working with several local districts to pilot a cohort for principal
supervisors, and are in the beginning phase of a potential virtual rural cohort of school
principals. Further, we have added three new workshop strands for our core
programming, including racial equity, trauma-informed leadership, and personal
wellbeing through crisis.

Overall, I have found it difficult to measure capacity. Edmondson notes, “[t]he
relationship between learning and performance is complex. The benefits are difficult to
quantify: they accrue over time, and accrue through second- and third-order effects.”
(2012, p. 253). Given the benefits will be clearer over time and perhaps show up in
unexpected ways, it has been difficult to measure the impact of our learning on our
capacity to scale in just nine months. Additionally, I operated throughout this project (a) with the understanding that capacity meant how much work could be done by a set amount of people in a set amount of time; and (b) with the assumption that by limiting the amount of wasted time caused by not speaking up and not giving feedback, we would be able to increase our capacity through improved efficiency. The previously discussed evidence hints that this might be true, though it does not prove that it is true. In fact, in many ways, this evidence indicates we made an improvement in effectiveness, but not necessarily in efficiency.

**Figure 10: Evidence for Progress Towards Theory of Action**

<table>
<thead>
<tr>
<th>Theory of Change</th>
<th>Progess</th>
<th>Evidence - After</th>
</tr>
</thead>
<tbody>
<tr>
<td>which will create increased capacity to scale.</td>
<td></td>
<td>February 2021 Culture Survey, on a scale of 1-5 (1 = strongly disagree, 5 = strongly agree), Team Averages on Questions Impacting Capacity: Members of this team are able to bring up problems and tough issues = 4 Unique skills and talents are valued and utilized on our team = 4 People on this team sometimes reject others for being different = 3.25 It is safe to take a risk on this team = 3.75 It is easy to ask others for help = 3</td>
</tr>
</tbody>
</table>

Anecdotal Evidence:
- Teammates offering to help each other out, take things off another teammate’s plate
- Being able to carry on the work when a teammate was out on leave
- Accepted proposal and contract for design workshop with Teach For America DFW
- Submitted proposals with Dallas ISD, Best in Class and TASA for new workshops
- Added new workshops for current principals in areas of racial equity, trauma-informed leadership, and wellbeing through a crisis

As previously mentioned, it’s important to acknowledge evidence pointing to the impact of the challenges this year has presented: the COVID-19 pandemic, working virtually, the volatile political environment, and the impact of the racist system in which we all exist. Each person came to work with increased anxiety and uncertainty and this ultimately impacted our ability to engage in difficult personal and interpersonal work. For example, the following was shared: “I’m excited for the growth. At the new year, I felt the
pressure to reset, but how can we reset with so much going on in the world? Do I really want to force myself to be okay when I’m not okay?” And from another teammate: “[p]ersonally, I’m in a hard space, so when it's hard to show up at all, it's hard to be able to do hard things. I particularly feel challenged with how much life is giving to everyone. Being critical sometimes doesn't feel like the way to go. At the end of day, I know I have to balance empathy with accountability, but it's hard.”

As psychological safety increased, these types of reflections were shared more vulnerably and openly and further proves the importance of creating psychological safety, especially as we were navigating such a complex and deeply emotional year, all the while doing it through a computer screen. The examples of Deliberately Developmental Organizations in An Everyone Culture (Kegan et al., 2016) do not include suggestions of how to do this type of work in a virtual setting. We engaged in this change project with no clear roadmap of how to create home, edge and groove while working through Zoom, or while grieving normalcy, or while processing the many other changes and challenges we each faced personally. So, overall, I conclude we made significant progress in this change project, given the tremendous challenges our team continues to overcome.

In sum, we have made significant progress toward developing home, the container to do challenging developmental work, by increasing psychological safety; by deepening our understanding of one another and ourselves; and by agreeing on the type of culture we are building. We’ve made some progress on our ability to be candid, and toward embracing critical feedback and conflict, albeit to a lesser extent. We’ve seen a positive impact on our ability to function and to become developmental, and those have started to show impact on our capacity to scale, though that has been difficult to measure. We have a profound understanding that the work of shifting our culture to
become deliberately developmental and the work of increasing our capacity through teaming takes a long time, and we are committed to stay on a journey that is unfinished.

**Analysis:**

My theory of action, which was based in deliberately developmental theory, teaming theory, and effective scaling strategies, suggested that if I focused on candor, feedback, and conflict as specific growth edges, we would then become more developmental, which would in turn improve our effectiveness as a team and increase our organizational capacity to scale. While this was true to some extent, it didn’t happen quite as anticipated. As the previous section showed, I was more successful in improving our candor and increasing comfort with conflict, but less so with increasing instances of critical feedback. I did have some success in creating a sense of home and psychological safety, although I found I was limited, due to ingrained assumptions about hierarchy. Overall, our team effectiveness has increased and we have taken on new projects, but it’s difficult to ascertain if we have truly increased our human capital capacity to do so.

To understand these successes and gaps, I will rely on Bolman and Deal’s Four Frames of Leadership (2014). This allows me to analyze my own leadership actions based on their four lenses: symbolic, human resource, structural, and political. In addition, throughout the analysis, I will incorporate theories of psychological safety, adult development, and the Kübler-Ross’ five stages of grief (Gregory, n.d.) to understand the nuance of this culture change project.

A multiframe approach is a particularly useful way of analyzing this change project, as it addresses various elements of an organization that must be recognized and leveraged in order to create lasting change. Because a leader tends to lean on one frame more than another, it is important to consciously work towards the frames that feel
less natural, since a multiframe approach is most effective. Essentially, to be effective, a leader needs to flex between different frames depending on what the situation warrants (Bolman & Deal, 2014, p. 18). Looking back on my experience with PIC, as well as all of my previous leadership experiences, I tended to lead from the HR or “family” frame. The same is primarily true with how I led this change project, although there are elements of each frame in my leadership. By analyzing each of these frames, I will be able to identify frames on which I over-relied and those which I under-utilized. This analysis will lead to implications for myself, as well as the site and sector.

Symbolic Leadership Frame:

“Deep down, people want to find meaning in both life and work. Symbols cluster to form culture, the shared patterns that define ‘our way of doing things’ for a group or organization” (Bolman & Deal, 2014, p. 107). The idea of symbolic leadership, paired with the following section on human resources leadership, was truly at the heart of our developmental work. Being a DDO is a way of doing things with the intention of supporting the creation of a meaningful work life and personal life, where you can be fully you (Kegan et al., 2016, p. 6). If done right, the heart of my theory of action is that the members of PIC would feel compelled not only by our mission to serve school principals, but also by our intentional way of interacting with one another, which results in individual growth and development. In analyzing the symbolic frame, I found that I was less effective at creating an inspiring vision and rituals of celebration, but more effective at creating a sense of community (Bolman & Deal, 2014, p. 105).

The role of symbolic leadership is to create focus, energy, and hope for the future, centered on a unifying vision (Bolman & Deal, 2014, p. 115). While I personally felt energy and hope from my change vision, I also believed it was a hypothesis that I was testing, and did not utilize it in a way that created unity or served as a rallying cry. Because of this mindset, I created experiences early on that I hoped would lead the
team to their own understanding and conviction about shifting our culture to become developmental. My intention was to create a bottom-up conviction, rather than a top-down mandate, which was not a typical, symbolic approach. To do this, I worked with the team to identify what was true about our culture at the time and what we desired to be true about it in the future, but I did not create a clear vision that we could all articulate and understand which left us without a unifying or symbolic vision.

I often shared my hopes and intentions for the specific meeting we were in, which might have led to some increased psychological safety and conviction for that particular conversation, but I was not direct and clear about my ultimate goal, which led to some confusion about our culture-change work. In fact, early in this change project, I received feedback from the executive director that I was not being as clear as I could about why I was choosing certain activities and what my goal was, because I would often start a meeting or learning experience by asking for feedback on whether or not the team felt it was the right topic or approach. While I was intending to do that to build buy-in and trust, it meant that I often confused people and perhaps left them feeling unsure about the purpose of the activity. The path to create a developmental culture is not always self-evident and must be centered around a clear and collectively ascribed-to theory of action, which creates urgency and cohesion and is specific to the needs of that organization (Kegan et al., 2016, p. 233; Bolman & Deal, 2014, p. 127). We might have made more progress if I had been clearer and more transparent about my theory of action or vision with the team early on, and if I had created opportunities for the team to provide feedback and be a part of the creation process.

After receiving feedback from the team that there was a need to integrate the teaming activities we engaged in, we created the baseball card, and the vision started to materialize. This process, which also led to the creation of the PIC Developmental Principles, ultimately resulted in an increased understanding of the theory of action for
our culture-change work, and therefore increased buy-in and motivation to achieve it. Additionally, the baseball card and the early “home-building” exercises created opportunities for the team to bond, encouraged cohesion, introduced workplace joy through sharing of ourselves personally, and allowed the executive director and me to model candor and vulnerability—key tenets of symbolic leadership which ultimately increased psychological safety (Bolman & Deal, 2014, pp. 124–125; Edmondson, 2019, p. 168).

A critical element of symbolic leadership is a compelling strategic vision that inspires others to follow it (Bolman & Deal, 2014, p. 127). One factor that might have led to less success occurred in the early stages of the project: I wasn’t clear with the team about the vision for our culture work, because I wasn’t totally clear on it myself. When I made a distinct shift by actually creating a clear statement and sharing it with the team to process, I saw a change in the way they talked about our culture and increased instances of developmental language and work occurring during our meetings. By creating a clear vision for our culture, sharing vulnerably about my own learning and missteps, and explicitly making the connections between our culture to our external mission, I increased psychological safety and increased urgency and conviction to do the difficult developmental work (Edmondson, 2019, Chapter 7; Bolman & Deal, 2014, p. 115). I might have seen earlier traction had I more effectively framed that our culture shift would take a significant amount of time and it might feel worse before it improved (Edmondson, 2012, p. 254). This would have allowed me and the team to recognize what was happening and acknowledge our progress more often.

Symbolic leadership calls for celebrating wins along the way (Bolman & Deal, 2014, p. 126). Throughout the strategic project, I would celebrate growth and progress as I saw it—shouting out a teammate for being vulnerable or for pushing back in a meeting; giving positive feedback in a one-on-one when I saw the fruits of working on a
developmental edge; or thanking a teammate for giving me critical feedback. I believe these actions contributed to some increased psychological safety and caused the team to continue to become more candid; however, it likely only improved in those areas and did not fully translate to significant team psychological safety. Because I was not as clear about exactly what the strategic vision was, I was also not clear about what wins I expected to see. I trusted change would happen; I then waited to see what it was, and celebrated those steps in small ways. If I had been clear from the beginning about what changes I expected to see and shared those expectations and goals publicly, our progress would have been more obvious to everyone.

The evidence shows that we have much to celebrate as a team, but I don’t believe I have created rituals and routines to make celebrations a part of our daily interactions. If I had created systems that allowed for my team to reflect regularly on their developmental growth, they might have seen their progress more clearly for themselves (Bolman & Deal, 2014, p. 125). We have grown psychological safety and started to develop a sense of home; my teammates are beginning to feel known and know each other; our team often shares that they feel safer at work, they are unafraid to share if they make a mistake, and they value our candor and productive conflict during brainstorm sessions. For example, I noticed, and teammates also commented about, our increased productive conflict and candor during the conversation when we finalized our new mission and vision statements. There is also evidence that teammates are learning new skills due to coaching and feedback, which is translating to positive experiences for our principals. We’ve also seen “wins” in scaling our work through the submission of new proposals, being hired by a new partner organization, and an early commitment to a new pilot program. But these wins were not lifted up and mirrored back to the team in a way that allowed all of us to see the growth as it was happening, or to celebrate how much we were growing, even in spite of the significant challenges working virtually during a
pandemic posed. Often, individual teammates would tell me stories about how their developmental edge work was impacting them or their work, but I did not elevate that to the whole team. These testimonials and stories can be powerful ways to create conviction, increase vulnerability and psychological safety, and build momentum (Bolman & Deal, 2014, p. 117). We might have seen even greater progress if I had created a culture of celebration as a means of reinforcement.

An area where symbolic leadership did prevail was in creating rituals and traditions that fostered a sense of community and openness through our weekly opening and closing meeting, and our weekly all-staff meeting (Bolman & Deal, 2014, p. 125). Although these are also structural shifts, they were symbolic in that they occurred regularly and created a time where there was no hierarchy, just connection—a chance to say hello, hear about each other’s personal lives, and be fully human. These symbolic moments supported our success in increasing our sense of home.

Ultimately, I underestimated the power of being explicit about my change vision and making my thinking visible, as well as the significance of celebrating progress. My TOA suggests that focusing on increasing candor, feedback, and conflict will make PIC’s culture more developmental, thereby increasing team effectiveness and capacity. If I had been more explicit about this change vision early on and created opportunities for my team to give feedback and suggestions to revise it, I might have created even more conviction and urgency to work towards it which would have created a stronger unifying vision. This, paired with celebrating progress and wins along the way, might have led to greater psychological safety and individual change, resulting in more critical feedback and productive conflict.

**Human Resource Frame:**

The human resource frame suggests effective leaders should align their decisions and actions around company values and principles, such as trust and
transparency, and invest in their people and empower them (Bolman & Deal, 2014, pp. 55–62). Additionally, the human resource leader must see themselves as their employees see them and be able to communicate effectively with others (Bolman & Deal, 2014, p. 76). In the following section, I will analyze my results through the human resource frame, including how I was able to invest in and empower others, the impact of grief on our ability to do this difficult project, and my awareness of how I was perceived by others and its impact on my ability to lead.

The human resource frame suggests leaders should heavily invest in their people, which is exactly what my project hoped to do (Bolman & Deal, 2014, p. 57). The underlying assumption was that if we create a culture based on developmental principles and develop and empower people to become their very best selves, then we would be a more effective team and have increased organizational capacity. I was successful in investing in our people to some extent. For example, it was clear that the team needed a shift towards candor and critical feedback so that they could communicate more effectively. It was also clear that individuals did not feel adept at giving critical feedback, so I chose to facilitate a series of conversations and workshops to ensure everyone understood what a deliberately developmental culture was, how to create one, how to give and receive feedback, and offered ample opportunities to share learning through our various debriefs and stepbacks. The workshops and training developed the team’s knowledge and understanding of what a DDO is, why it exists, and how it might function. We also engaged in workshops to learn how to be more effective at giving and receiving feedback. These development sessions were investments in our people and positively impacted our work to build home and an understanding of elements of the project, such as what an edge is or how to give feedback.

However, these development sessions did not directly result in the team being empowered to integrate their learning into their work as effectively as I hoped. This might
have been because I was less than clear about my vision early on and not intentional about how to bring them into the planning and development of the project as I could have been. If I had empowered and enabled others to own this priority as well, in a more collaborative structure, it might have created more buy in and understanding for the change.

Investing in and empowering others also requires psychological safety, which I worked to create through the actions to build home. As discussed in the RKA, having psychological safety creates a place where team members can be open and vulnerable without fear of retribution, consequently removing the barriers to speaking up (Edmondson, 2012, p. 125). The exercises we did as a team helped to lay a foundation for this safety and to build home (such as Enneagram, journey lines, core values, sweet spots, weekly hellos, and reflections and mindfulness during team meetings), which allowed us to better understand each other as whole people—what we value and why, what our insecurities might be, and what our preferences are. These experiences allowed us to know each other more fully and to begin building the container for our developmental work. As one teammate explained, “I appreciate the intentional pause to do reflective work as a team, I know we have to do these to be connected and authentic in the work.”

Although not explicitly a part of the human resource frame, investing in people can be supported by understanding their context and their needs outside of the workplace. Throughout this strategic project, our world, country, and state were experiencing turmoil. Broadly, we were navigating the global pandemic, a volatile political climate—including an insurrection on our Capitol; a racial reckoning across the country and a financial crisis. More locally, the closing of Teaching Trust, significant cuts to school budgets, complicated hybrid-learning models; and even more personally, insufficient child care and three postpartum recoveries, among other life changes and
demands. These life-altering experiences can cause an individual to experience grief, which can in turn impact their ability to lead and to work (Berinato, 2020). I believe many, if not all of us on the PIC team, experienced the stages of grief (as can be seen in Figure 11) throughout this change project and were in different stages at different times. This cycle shows how a person navigates grief starting with shock and denial and ultimately ending with decision and integration (Berinato, 2020). At PIC, an example of integration occurred when we realized how well we led virtual adult development for principals and that our new racial identity content was overwhelmingly effective. The research shows it is possible to minimize the “grief dip” through coaching (Berinato, 2020), so our work to become more developmental, and may have actually helped us stay higher on the grief curve and minimize some of the depression by having peers and managers supporting each of us in our full humanity.

However, I think it is also important to explore: if we are all in a space of shock, denial, frustration, or depression, then how much change can really be expected? When grieving, how much growth is truly possible? I began this work approaching change in the same way I would have if there wasn’t a pandemic (I was in the denial stage), and I really didn’t grieve for myself or consider how challenging the pandemic would make even the simple parts of life. Because I was in my own state of frustration and depression (caused by postpartum and COVID-19), it was difficult for me to understand and to navigate others’ emotions and needs—I was not fully myself (Berinato, 2020). I did not recognize, at the time, how incredibly complex and challenging our world was, and I did not create space and time for the team to process their grief by creating space for us to name and feel the grief (Berinato, 2020). This might have limited psychological safety and the team’s ability to minimize the dip.
Managing human resources well also includes managing yourself well. This is done by having fine-tuned self-awareness, in order to develop a clear picture of yourself as others see you. This can be done by taking a stance of humility and inquiry (Bolman & Deal, 2014, pp. 64–65; Edmondson, 2019, pp. 167–170). My effectiveness in creating psychological safety might be in part due to my frequent requests for feedback, both about the work and also about my leadership (Bolman & Deal, 2014, p. 69). For example, in June I started to engage every teammate in extended one-on-one check-ins, listened deeply to hear for everyone’s areas of growth to determine where we needed to focus, sought feedback on the vision and plan as we went, and asked for feedback after each of our sessions for changes. Leading through inquiry and inviting others to improve the work and to provide me with critical feedback led to improvements in our learning stance by increasing psychological safety (Edmondson, 2019, p. 165).

However, this amount of feedback also meant that I wasn’t always as clear or confident about the strategic vision, as previously mentioned. And I lacked the self-awareness to see that, while candor was increasing in my individual relationships, it wasn’t necessarily translating to increased candor in all settings. Because I am relationship driven, I am quick to see the changes needed to improve interpersonal
relationships, and assume, sometimes wrongly, that others see those needs as well and are motivated by them. By underestimating others’ ability to see the importance of candor and feedback, I missed a huge opportunity to build a greater sense of urgency for shifting our culture to become more developmental and candid, with more opportunities to disagree. I also missed opportunities to speak up and to be candid myself (Bolman & Deal, 2014, pp. 70–73; Edmondson, 2019, p. 168). If I wasn’t being entirely candid, how could I expect others to do the same? By being highly collaborative and seeking feedback often, but not being direct and candid about my leadership moves, decisions, or failures, I ended up leading through an accommodating lens instead of an integrative approach (see Figure 12). By leading with accommodation, I did not create opportunities for my teammates to engage in conflict and did not advocate often enough for increased critical feedback. An increase in advocacy might have helped to “interrupt ineffective patterns and provoke self-reflection” in my teammates through a stronger balance of inquiry and advocacy (Bolman & Deal, 2014, p. 76).

**Figure 12: Bolman and Deal’s Advocacy vs. Inquiry Matrix**

![Bolman and Deal's Advocacy vs. Inquiry Matrix](image)

*Source: (Bolman & Deal, 2014, p. 73)*

By having high inquiry but low advocacy and missing the steps of creating a sense of purpose, I hindered psychological safety (see Figure 13). There were
opportunities for me to model candor by being direct about our goals and expectations, normalizing making mistakes, and speaking up when I felt we weren’t aligned to our developmental principles (Edmondson, 2019, Chapter 7). The executive director and I started this work by being the first to share our baseball cards and giving each other public feedback using the cards. This was a strong first step, but I did not create more opportunities to model in this way and, as stated earlier, I missed opportunities to frame the work by setting a clear vision. I also missed opportunities to emphasize purpose (Edmondson, 2019, pp. 162–164). Each time we used a tool or engaged in an activity that I envisioned using to push us toward this change work, I would explain what we were doing and why. However, this remained fairly surface level and would have been more effective if I had shared what was at stake and asked the team to make these connections and reflections throughout the process themselves. The challenge with missing this important step is it created a lack of clarity in whether or not there were boundary violations as referenced in Figure 13. Because I had not led the team to create clear organizational principles, it was not clear to anyone what the boundaries were, and therefore it could not be addressed if they had been broken. This was the primary reason for engaging in the two part principles creation process, albeit late in the change project. By going back and creating these principles, which are, in a sense, boundaries, the team and I were then able to have candid conversations when one was not upheld.
One example of my lack of self-awareness was how much I underestimated the impact of historical and present context on each individual's ability to be candid, give feedback, and engage in conflict. While I was more successful at building home and psychological safety through our various team building activities and through my frequent requests for feedback, I was less successful at increasing critical feedback and productive conflict. One of the reasons for this was my inability to see what others saw (Bolman & Deal, 2014, p. 64–65). I missed important understandings, such as being able to see how siloed the team had become due to the virtual context, underestimating the stickiness of the hierarchical structure, and undervaluing the importance of a clear decision-making process. These factors made it so that not all team members felt safe giving feedback in all situations, for reasons I did not anticipate or address during the change project due to my unawareness at the time.

Lastly, I believed according to my theory of action that we needed to increase critical feedback, which I chose to do by attempting to increase the amount of unsolicited critical feedback being given (rather than asked for), with an underlying assumption that it would happen when people felt psychologically safe enough to do so. However, my evidence showed that even though our psychological safety and sense of home was

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**Figure 13: The Leader's Tool Kit for Building Psychological Safety**

<table>
<thead>
<tr>
<th>Setting the Stage</th>
<th>Inviting Participation</th>
<th>Responding Productively</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership Tasks:</strong></td>
<td><strong>Demonstrate Situational Humility:</strong></td>
<td><strong>Express Appreciation:</strong></td>
</tr>
<tr>
<td>Frame the Work</td>
<td>• Acknowledge gaps</td>
<td>• Listen</td>
</tr>
<tr>
<td>• Set expectations about failure, uncertainty, and interdependence to clarify the need for voice</td>
<td>• Be inclusive</td>
<td>• Acknowledge and thank</td>
</tr>
<tr>
<td>• Framing is ongoing process</td>
<td>Practice Inquiry</td>
<td>Destigmatize Failure</td>
</tr>
<tr>
<td>• Identify what’s at stake, why it matters, and for whom it matters</td>
<td>• Ask good questions</td>
<td>• Look forward</td>
</tr>
<tr>
<td><strong>Emphasize Purpose:</strong></td>
<td>Set Up Structures and Processes</td>
<td>Offer help</td>
</tr>
<tr>
<td>• Create forums for input</td>
<td>• Create forums for input</td>
<td>• Discuss, consider, and brainstorm next steps</td>
</tr>
<tr>
<td><strong>To Accomplish:</strong></td>
<td>Provide guidelines for discussion</td>
<td>Punish Clear Boundary Violations</td>
</tr>
<tr>
<td>Shared expectations and meaning</td>
<td>Orientation toward continuous learning</td>
<td></td>
</tr>
</tbody>
</table>

Source: (Leadership Now, 2019)
increasing, it wasn’t yet impacting our frequency of critical feedback, especially upwards in the hierarchy. For example, during my entire change project, the only unsolicited critical feedback I received was from the executive director. I did receive critical feedback from others, but only when I asked for it. According to Brené Brown, to create spaces where vulnerability and candor are safe and transformation can occur, people must be able to give and receive feedback. To do that a person must first be willing to solicit and receive feedback before they can become effective at giving it (Brown, 2012, pp. 197, 205). If feedback is solicited frequently and with true openness, then giving feedback will happen more frequently and candidly (Bolman & Deal, 2014, p. 69). When I shifted my thinking from increasing critical feedback given, to increasing critical feedback sought, I personally saw an increase in candid responses and more openness to share critical feedback. While the goal remains to create a culture where feedback is continuous and a collective responsibility, there needs to be scaffolding to achieve it (Kegan et al., p. 111). The leader needs to “make the first move to foster a culture of learning” (Heifetz et al., 2009, p. 287) and in this case, I needed to begin by asking for feedback, which reduced the risk for team members and increased psychological safety.

**Structural Frame**

An organizational structure helps employees know what they are supposed to do and how to do it, and should align to the type of work being done (Bolman & Deal, 2014, pp. 26–27). Throughout my change project, I led changes to some of PIC’s existing structures to align them to our new developmental approach and introduced some new structures, which resulted in systems that supported candor, feedback, and productive conflict. But I also underestimated the impacts of virtual working life on informal interactions, how the hierarchical organizational structure might inhibit candor and feedback, and how the complexities of leading in crisis through the pandemic might impact the type of leadership needed.
The evidence indicates that we made significant progress towards creating home, and some progress towards developing our enabling conditions of candor, feedback, and conflict. One of the reasons we were able to achieve these successes was through changes to the organizational structure, which allowed for improved vertical and horizontal coordination (Bolman & Deal, 2014, p. 28). I knew I needed to intentionally create opportunities to build home, edge, and groove within our organizational structures and systems, in order to create a lasting change (Kotter, 2012, p. 146). I had the opportunity to adapt existing structures to support our developmental work and introduced some new structures.

For example, the team had one, pre-existing weekly all-staff meeting, which focused on sharing updates and information. I led the team to shift the focus to becoming more efficient in sharing updates. This was accomplished by moving much of this part of the meeting to an asynchronous model and left the in-person time to do team building; i.e., mindfulness, brainstorming and feedback, collaboration, and clarification of needs and asks. This change was also done in tandem with the team and through rounds of iteration and further tweaking and investing the team in the change. I also initiated a new process for workshop debriefs and strategic planning stepbacks, based on the AAR concept discussed in the RKA. The strategic planning process resulted in more meaningful goals for each individual to pursue and by reflecting back on them halfway through the year, I further increased the urgency and ability to meet them.

I also added the monthly post-workshop debriefs to increase our opportunities to reflect candidly about what worked and what didn’t, and what it was about our decisions or actions that led to those changes. These debriefs created opportunities to have conflict and sometimes give feedback to each other. They also led to changes for the upcoming workshop, workshops the following year, new ideas for how we should debrief for our pilot programs, how we communicate and ask for feedback from our district
partners, and they even impacted the content for our funder updates and marketing materials. This one structural change increased our ability to coordinate and collaborate across many functions. Ultimately, these improved and new structures created intentional time for teammates to deepen their understanding of each other and themselves (supporting home and edge), and to engage in reflective conversations about how to improve our programming (opportunities for candor, feedback, and conflict).

Because of COVID-19 restrictions, the PIC team shifted to a virtual working environment for our internal work and for all of our external programming, which created changes to the way that information was being shared. Due to working remotely, all informal interactions disappeared, people primarily communicated with one another only in prescribed meetings, and unstructured social time no longer occurred. PIC is a small organization and people communicate in organic ways, often relying on informal opportunities to collaborate, communicate, and problem solve together. With the shift to remote virtual work, these more informal interactions could no longer be relied upon as a means of team building or information sharing. The change I previously mentioned to the meeting structures was critical in ensuring that all team members had opportunities to share what they were working on and what they were learning in their work. However, I missed the mark on ensuring all team members had opportunities to engage with one another individually and was not clear about how the team should communicate new ideas, proposals, or projects to one another, in order to keep everyone in the loop. Teammates only had exposure to one another and specifically to our executive director if it was a pre-planned meeting. This, combined with the increased awareness of everyone feeling overwhelmed, led to the following reflection from one teammate: “It’s hard to know when to have feedback conversations. When I don’t have time with a person, it feels weird to ask for time to have a critical conversation. Right now, my lack of
comfortability to put time on people’s calendar impacts my ability to be candid. I don’t feel I can add time with someone. So, they aren’t aware of what I am doing to give me feedback on my work.”

The structures of virtual working life also meant that there was less informal conversation that would typically have kept everyone looped into other people’s work. For example, if we had the opportunity to submit a new proposal, but forgot to include that in the weekly meeting update, then a person not working on the proposal wouldn’t know it was happening because informal conversations about work were no longer happening. I did not realize the impact working virtually was having on our ability to candidly share information and concerns until later in the project, which created unnecessary hurdles to our developmental work.

The evidence indicates that even by the end of the project, some teammates still felt candor was inhibited by a sense of hierarchy, which impeded people in lower ranks from feeling psychologically safe to give feedback upwards. A traditional hierarchical structure where information and critique only flow downward is best fit for work that is constant and does not require adaptation or critical thinking (Bolman & Deal, 2014, p. 31). However, this is quite opposite of the type of work PIC does, which is highly adaptable, customized, and creative. The hierarchical structure does not fit the type of work being done at PIC which deterred some people from being candid and engaging in productive conflict. There are implicit and sometimes explicit assumptions around autonomy, collaboration and feedback, due to this real and perceived hierarchy. Our clearly defined roles and responsibilities matrix created a structure that organized the work—but without intentional systems to create collaboration and psychological safety, it seemed to inhibit candor. Because I did not recognize the concerns or fears around hierarchy or the ways it was silently showing up in our meetings, I did not address it directly. This primarily impacted feedback and resulted in teammates not giving
unsolicited feedback, as was addressed in the previous section on the human resource lens.

The evidence also indicated that some team members held back from being candid at moments when they were unsure about their own authority and the decision-making process, or when we were in a situation with collaborative leadership or one with centralized leadership. Throughout this change project, we were leading amidst the COVID-19 crisis, which dramatically impacted all of us but often in ways I did not recognize at the time. While leading through a crisis, a leader must ensure that their team has all the facts and information they need, ground the team in what is needed for the future, trust their team to make good decisions, and ensure the people are cared for and supported on a personal level (Center for Creative Leadership, n.d.; McNulty & Marcus, 2020).

Prior to this project and before the pandemic, PIC tended to be organized with both centralized leadership and decision making, and with high levels of collaboration, regardless of the type of work. I continued to use this sort of organic leadership approach and was not intentional about increasing communication, wasn’t clear about trusting the team to make decisions, and did not check in often enough on their personal wellbeing, as would be necessitated by crisis leadership. Instead, final decisions were most often made by the executive director, and teammates were brought in to collaborate, ideate, and brainstorm on most projects. The structures I created and implemented, such as workshop debriefs and team-wide curriculum planning meetings did fit the structure of collaboration and improve communication. However, some teammates did not feel safe enough to give candid feedback when they felt a need for more clarity around decision making, or a need for more collaboration and less centralization.
Due to our formal matrix and hierarchy and push to become even more highly collaborative, it sometimes left some team members out of the communication loops, making it more difficult for them to collaborate effectively. For example, without knowing where a leader is in the planning process, another team member held back on giving feedback because she wasn’t sure if it was needed at that stage. Team members also lacked clarity about their respective levels of authority (Bolman & Deal, 2014, p. 45). PIC is an interdependent team—each person relies on other people to be effective in their own role. By not making decision-making processes and moments of collaboration and feedback clear to everyone, I hindered psychological safety, resulting in less critical feedback and candor at times when it was particularly needed as we navigated the crises.

This line of thinking explains why, at times, a sense of hierarchy was needed and desired but at other times it impeded the team’s ability to collaborate and give feedback effectively. Additionally, the structure needed can also change at different stages of work, so when PIC is in a planning phase or is designing a new program, a highly collaborative structure is needed, and when we are in an execution stage—such as submitting a new proposal or executing on the program mode—a more centralized, high accountability structure is needed (Bolman & Deal, 2014, p. 43). As I was leading the team toward a structure that would increase feedback, it sometimes conflicted with the need for centralized leadership. At other times, the centralized leadership (or perception of such) conflicted with the need for candor. As a leader, I was not clear about which structure we needed at what point, and missed opportunities for clear framing. The team needed clarity about who made what decision and when, as our environment and context shifted throughout the year.

While many of the structural changes I led created a positive impact on our ability to become more developmental and to increase our effectiveness, there were also
missteps, such as not anticipating the clarity needed about our structures—particularly because of our virtual context within the crisis of the pandemic—which led to less critical feedback and productive conflict.

Political Frame:

Because people have their own interests and unique values and because we “live in a world of scarce resources,” leaders need to be able to identify and navigate political dynamics rather than ignore them (Bolman & Deal, 2014, pp. 79–80). One aspect of navigating political dynamics is understanding power. There are several different types of power: power that comes from a role or position, power generated from relationships, and personal power (McGinn & Long Lingo, 2007). Power and politics are at play in both areas of success and failure in this project.

Throughout my change project, there were moments where I undervalued my own power. In the beginning, I saw myself as an outsider and not being a part of the current culture or structure, but my team saw me as an insider and as being in the layer of leadership. And this was true—I held a role, I was their manager, and I was the only one directly managed by the executive director. I did, in fact, have positional power, and I used that power to decide what content we would engage with to do our development work, to schedule training and workshops, and to focus our team’s energy on certain edges.

But I did not recognize the limitations of my positional power. Positional power comes with perceptions and historical experiences that others place upon the person in that position immediately—these relate to the position and not the person. For much of this project, I did fully understand how my positional power was impacting others in the organization and their ability to be fully candid with me. By not recognizing and acknowledging my positional power, I misunderstood the impact hierarchical power was having on our ability to create psychological safety. I mistakenly assumed, because we
worked so collaboratively, that hierarchy and positional power was less influential than it really was.

I also had relational power. Prior to beginning residency, I was a principal in the PIC program, which meant I had a previous relationship with our executive director, some of our partners, and some of our alums. Additionally, one of my teammates was a teacher on the campus where I was a principal. These relationships allowed me to progress the work quicker than I would normally have been able to do with new people, especially in the virtual context of COVID-19. I utilized these relationships to seek out their feedback and commitment early on. However, I was also cautious about not over-relying on these relationships, for fear of making anyone else feel less important, although I was not candid about this. As I worked to create transparency in the organization, I was often not candid about the anxiety and worries I had. I worked for the last several years on my personal ITC goal of being able to be truly candid and give direct and critical feedback to others, particularly when there is an imbalance of power. Often, I felt this goal at odds with the work I was trying to do. While I was in a position of power, I did not feel that I had equal relationship power with everyone and I did not feel I had “expertise power,” being the newest member of the team. My own perceived imbalance of power and abundance of caution led me to be less candid and direct than I should have been, thereby not creating the psychological safety necessary and not modeling for the team what candor should look and feel like.

Political leadership includes understanding the political and power map of an organization and its stakeholders and creating an effective and inspiring agenda or vision (Bolman & Deal, 2014, p. 81). To map the political terrain, I met with each team member one on one early in my residency, to understand their history with PIC and their hopes and dreams for their future and the organization’s. These conversations allowed me to create an agenda specific to their needs—the need to be more candid, provide
more critical feedback, and engage in productive conflict. In this way, and throughout the project, my use of one-on-one check-ins to ask for feedback, provide coaching, and encourage others to speak up, allowed me to leverage my political leadership to create more value for all (Bolman & Deal, 2014, pp. 85–87).

However, in the beginning, the vision was not communicated in an effective or inspiring way. As it became clearer, individuals became more motivated by it and more willing to work towards it. If I had incorporated my understanding of the interests and needs of the people on the team (that I was learning about during the one-on-ones) into a communication strategy around the vision, it might have been more compelling to all (Bolman & Deal, 2014, p. 81).

Beyond using individual’s needs to inform the agenda, it is also important for a politically savvy leader to use the information gathering phase to create allies (Bolman & Deal, 2014, p. 84). PIC is such a small organization, that I did not consider creating a smaller group of leaders to push this work forward, instead I thought of everyone as the guiding coalition to some extent. However, I did rely on the executive director to provide feedback, brainstorm ideas, and ensure my actions aligned to the overall organizational strategic vision. In this way, the executive director became my strongest ally. This was effective in ensuring I continued to have bandwidth and authority to do the work.

But I did not leverage the executive director as well as I could have by setting them up to be a powerful messenger and communicator of the agenda and its purpose. I underestimated the value of the change vision coming from our executive director and not just me. While I spoke often about the need for our work toward a greater sense of vulnerability and development, I did not often ask the executive director to do the same. I could have more strongly advised them on ways to create psychological safety, communicate the vision, and celebrate the short term wins rather than using them mostly as a sounding board and occasionally asking them to lead (which they were always
willing to do). I have no doubt they would have contributed greatly to the sense of urgency if I had created the space to do so, and this would have further modeled providing critical feedback and being candid.

An aspect of being a political leader is understanding the needs of your stakeholders and using that to inform your agenda, create allies, and increase value for all (Bolman & Deal, 2014, p. 81). In trying to understand the needs of my team, I was able to understand what each person’s developmental edges were, which allowed me to target our approach to becoming developmental and to be strategic about how to increase team effectiveness (specifically through candor, feedback, and conflict). But I did not recognize where each person was on the stages of adult development, and how that might impact their ability to do this type of developmental edge work; nor did I appreciate the ways I would need to differentiate my support.

The foundation for Deliberately Developmental Organizations rests on the theory of adult development found in the graph below in Figure 14 (Kegan et al., 2016, p. 62). This change project asked the people at PIC to become more candid, to provide more critical feedback, and to engage productively in conflict. To employ these skills independently, it would require a person to have a self-authoring mindset in order to understand themselves, their organization, and the world around them in a more complex way (Kegan et al., 2016, p. 73–74). A person operating in the socialized mindset would rely on external authority to expect or mandate this type of communication and then would need significant scaffolding to be able to engage in candor, feedback, and conflict, and would still only do so out of a desire to please leadership (Kegan et al., pp. 64–65). While I do not know for sure which stage each person on our team is in, I do believe it is likely that we mostly fall in socialized and self-authoring mindsets.
There is a need for a DDO to offer different types of support depending on where the individual is developmentally (Kegan et al., 2016, p. 68). I was able to create differentiation in my coaching of each person through one-on-one check-ins. These were opportunities to create alignment, direction, and a sense of team, which would motivate someone in the socialized mind to work towards the change (Kegan et al., pp. 63–65). I also asked questions early on to understand each person’s career goals and professional goals for the year. I was able to use these to target my supports to their personal learning agendas, which would ideally support a person in the self-authoring mindset (Kegan et al., 2016, pp. 65–69).

However, it is a little more difficult for me to understand how to support the development of a person in the self-authoring mindset, as they might have hidden agendas or be less outwardly clear about what their self-authored filters are (Kegan et al., 2016, p. 66). These are people who act independently and have their own frame. I believe I needed to bring their frame into the larger picture more often, to show connections between their individualized goals and the resulting increased capacity to...
grow as a team. Ultimately, the goal of a DDO would be to challenge every person, regardless of which developmental plateau they are on, to be growing towards the next. I am not clear to what extent, if at all, we were able to do this.

Summary of Analysis

Each frame—symbolic, human resource, structural, and political—is connected to the next and reliant on each, which is why being able to use them with agility and understand which frame is most useful for which situation can lead to effective change leadership (Bolman & Deal, 2014, p. 20). However, I believe from my experience, that when a leader is also working through stages of grief due to traumatic experiences like the pandemic or a natural disaster, it can limit their ability to reflect deeply on which frame is needed and act accordingly (Berinato, 2020). I would hypothesize that a person would over-rely on a certain frame when experiencing grief or trauma, which would explain why I tended to rely on the human resource frame, or my ability to build strong and trusting relationships, throughout my change project. This project assumed that the PIC team was in a state where they were able to take on difficult developmental work. While this was often true, the theory of action did not take into consideration our psychological state amidst the pandemic and what impact that might have on our individual ability to engage in developmental growth, or to be able to recognize when growth was happening. I clearly see growth and improvement in each of my teammates and our team as a whole, which leads me to believe this project has been largely successful, despite a less than clear vision in the beginning, the volatile and quickly changing context of the pandemic, personal challenges, and missed opportunities to celebrate the small wins. We are absolutely on a path to becoming more developmental and have shown that individual development does, in fact, create a higher functioning team, which can create capacity to scale.
Adjusted Theory of Action:

Based on the previous analysis, I have adjusted my theory of action to reflect my new learning and reflections:

If I create enabling conditions that allow for individuals to develop their ability and commitment to be more candid, ask for and receive critical feedback, and engage in productive conflict, then the team will become more high functioning, and then PIC, as an organization, will become more deliberately developmental and able to iterate and refine our growth edges, which will create increased capacity (in terms of effectiveness) to scale.

Implications for Self:

I am forever indebted to the PIC team for trusting me to lead our teaming and development work to which, I believe I have been the ultimate beneficiary. As my analysis indicates, I have three primary learning points which include: first, underestimating the amount of vision clarity, psychological safety, and time needed to create change; second, underestimating my own leadership power and need for wellbeing; and third, not spending enough time celebrating and recognizing the small (and sometimes not so small) wins for my teammates and myself.

Clarity of Vision, Psychological Safety and Urgency

I dramatically underestimated the value of having a clearly communicated strategic vision. In the beginning, I did not even realize that I wasn’t clear about the theory of change, and so I wasn’t able to be transparent about that with the team. My lack of confidence early on in my entry at PIC led me to be less willing to put a stake in the ground. In the future, I need to slow down in the beginning and co-create a theory of action, so that I am not relying on my own knowledge or confidence and instead build momentum and conviction with others. This will in turn create a greater sense of urgency
for change. In future roles, I need to recognize that my tendency is to lead through a human resource lens and not as much through a symbolic or political lens (Bolman & Deal, 2014). To balance this, I can rely on others to backfill my historical knowledge of the organization, to provide nuanced reflections on what the future ought to look like, and to rally their peers and networks towards this new vision. Similarly, I will build psychological safety and trust by being open and transparent about my learning agenda and the areas where I need support from the very beginning.

I also underestimated the value of the change vision coming from the executive director and not just me. This has made me realize the importance of working with the leadership team in an organization to create a common message that reverberates throughout every conversation and interaction. I need to leverage my power and influence in these conversations more than I did, which I will dive into deeper next time. As mentioned previously, early in my change work, I received feedback that I was not as clear about the purpose of activities because I asked for so much feedback before diving in. I did this as a way of bringing others into the work and as an attempt to co-create, but I realize now that my timing was ineffective. Rather than asking for feedback at the beginning of a meeting, discussion, or activity about how that interaction could be conducted, it is more effective for me to gather that feedback during the planning process, or to even create a coalition or team of allies who are working with me to create the programming. Getting feedback earlier in my projects will improve my confidence by knowing that I am doing the work with a group of empowered team members and not alone.

Lastly, I now recognize how hard it is to create psychological safety when hierarchical barriers exist, whether perceived and/or real, and I recognize that moving forward I must do strategic and thoughtful work to identify those types of barriers, acknowledge them and replace them with a new way of thinking and acting. This
requires acting out of all frames but particularly the political frame, by understanding the
needs of individuals and working towards creating value for all (Bolman & Deal, 2014,
pp. 85–87). As a leader, it is critical for me to seek out opportunities to build
psychological safety systematically through the utilization of many factors working
together as described in Teaming (Edmonson, 2012), such as sharing my own mistakes
and growth edges, holding others accountable to the organization’s mission and
principles, celebrating progress, and responding openly and with care when given critical
feedback Edmondson, 2012, p. 139).

My Leadership Power and My Wellbeing

On a more personal note, I underestimated the impact of my postpartum
recovery, while in COVID-19, on my ability to be confident at work and to lead with
vulnerability. My struggle to regulate my own emotions resulted in being emotionally
unavailable at work and not acknowledging or recognizing how emotionally difficult
development work can be. This meant that I often got lost in my own virtual silo and
failed to recognize the challenges my team was having that were within my control. Nor
did I reflect regularly enough on what my leadership moves were, or sufficiently analyze
what was working or not working along the way. Further, I did not respond with positive
emotions to celebrate our wins as boldly as I would have normally.

And all of this was complicated by the fact that I was working from home with my
young children, whom I regularly supported throughout the day as needed (and a huge
shout out to my supportive partner who was the primary caretaker). The complex
emotions I felt this past year meant that, like many of us, I had good days and I had bad
days. And my role as a mom (particularly a mom of very young children) and a partner
and a daughter, during a pandemic, inherently impacted my ability to be effective at
work. Sometimes it makes me more effective—more able to make confident decisions
and communicate concisely—and sometimes it hinders my ability to be vulnerable and
to expose my weaknesses as honestly as a leader should. Here, the implication for
myself is that I finally recognized the need to seek out therapy, which was incredibly
helpful in setting boundaries and realistic expectations of my own, as well as engaging in
daily affirmations and gratitude. I will also discuss suggestions for organizations to
address this complex and quite universal need in implications for the sector.

However, when I was able to start sharing more about my personal struggles, I
found it created space for others to do the same. The more open and vulnerable and
honest I could be with each member of the PIC team, the more they opened up to me as
well. By bringing my whole self to work, I can create a space for others to be their whole
selves with all of their own flaws, challenges, and insecurities. In my future work, I will
carry this important learning experience with me and use it as a motivator to speak first
and often about challenges, thereby creating a culture where that is not only acceptable
but encouraged.

Finally, I—at times—undervalued my own power or had flaws in my self-
acknowledgement of my power. By underestimating the amount of power that came with
my role, I undervalued the impact that hierarchy had on my ability to create
psychological safety. I also operated out of a desire to make every person at PIC feel
valued, and I might have led too cautiously those with whom I had no previous
relationship. I also undervalued the impact of modeling candor and vulnerability. In the
future, particularly in new roles, I will need to operate with a value and intention to be
candid. Daily self-reflection and journaling help me to recognize moments where I am
being less candid, as well as utilizing the pinch sorting tool to understand where my
insecurities might be coming from. These reflections will support my ability to self-reflect
and be candid in the future.

Recognizing the Wins
Even for me—a person who cares deeply about culture and believes it to be the driving force for results—it is easy to get wrapped up into the day-to-day work of executing the program and go days without thinking about internal culture. I now understand that to create a culture of learning, it cannot exist solely in a meeting agenda or a workshop; it must become a part of an organization’s DNA. As a person who intends to continue to do this type of culture change work for organizations, I must consider how to build the technical changes needed to create systems, structures, and practices to support learning as well as doing the trust- and relationship-building work that comes more naturally to me (Bolman & Deal, 2014).

I must also be thoughtful about how I communicate both the vision and the successes. When I see progress, I need to put that at the forefront of people’s minds so they, too, can see and celebrate the small wins. Similarly, I do not regularly reflect on or celebrate my own successes or wins. As can be seen throughout my analysis and the above implications for self, there is more focus on areas of growth than on the areas that went well. To address this, I will build celebration into every meeting by starting, after the hellos, with a reflection question: **Name one thing you’ve done this week that you are proud of.** I will in turn share my own answer to the question. Committing to a practice of personal gratitude at the end of each day has also supported my ability to recognize and celebrate wins—big and small.

Lastly, one of my goals for coming to Harvard and completing this degree was to narrow my own leadership focus, to find out what it is that I am good at, to get better at that, and to have my thoughts and opinions challenged such that I might change my direction. I am now confident in saying that I have finally arrived at an understanding of what it is that I do—what I am good at, what I love, and how it can serve others. While education is my career and the place where I choose to do this work, what I am passionate about is helping organizations create cultures of transparency, so that they
can learn from one another, be more effective, and so all humans can have a place to work where they can thrive and be respected and valued in their whole humanity. I am a developer of people, a forever learner, and a leader of culture. In my future roles, I know this needs to be at the core of my work.

Implications for Site:

My analysis suggests there are two significant and adaptive challenges that need to be addressed before real change will become a part of our cultural DNA: change perceptions of hierarchy and increase accountability. These also include several more technical changes that will further support the development and teaming work, such as increasing one-on-one time, having more purposeful celebrations, and codifying learning through more effective systems.

Change Perceptions of Hierarchy

PIC’s leadership should consider engaging in the adaptive work of changing the perception of the role of hierarchy within the organizational structure. Because people are socialized to acknowledge and respond to power and hierarchy, and these perceptions can make it more difficult for those with less power to be candid with those who have more power, leaders must strategically and thoroughly shift the perception of hierarchy (Edmondson, 2012, p. 131). This can be done first by shifting the developmental goal of giving critical feedback, to asking for critical feedback. If leaders are regularly asking for, and receiving, critical feedback, this will, over time, create a culture of feedback and diminish the fear of overstepping the hierarchical power structure. While having clear roles and responsibilities is important from a structural and human resource lens, it can inhibit candor and feedback if there isn’t strong psychological safety. Several teammates shared concern about being fully candid or being able to give unsolicited feedback upwards. To address this, leadership can start to
build trust by asking for feedback and receiving it openly and with gratitude. They can then share how they are implementing feedback to further build trust and psychological safety overtime. By focusing on asking for and receiving feedback, the amount of feedback given will increase overtime. When feedback is sought across lines of power and received with gratitude and action, others will see that their opinions and ideas are valued and will begin to give feedback more freely.

Several teammates also shared the difficulty of being candid and giving feedback when they have limited interactions with others throughout the week, which has been exacerbated by the virtual working environment. An increase in the amount of one-on-one time could support this concern. The executive director might consider having unstructured, one-on-one time—like a lunch or coffee—with each teammate, every month. This is feasible while PIC is small, but would likely need to shift with growth. This same structure could be beneficial for every teammate throughout the month, so that every person has an opportunity to engage with each other monthly outside of our structured work meetings.

Lastly, the negative impact of hierarchy can also be broken down by increasing purposeful celebrations. If the team is regularly celebrating progress and highlighting bright spots, urgency and commitment to development work will increase. This will be particularly helpful if moments of candor and feedback, which has been given upwards, is pulled out and celebrated. This shows to the rest of the team that it is not only safe to give feedback regardless of rank, it is in fact applauded. By recognizing growth, team members will also be able to recognize future progress more aptly. This can be done through regular vignettes and testimonies during team meetings or other whole-team engagements. This can also be done by reflecting at the end of meetings and debriefs, individually with optional share-outs, on how the meeting or the team impacted their growth during that meeting. Building in regular time for public and private celebration of
progress will support the overall urgency and motivation to continue to do difficult edge work.

A few other suggestions for how PIC leadership can shift to empowerment include: share your own mistakes, the limits of your own knowledge, and celebrate your own growth openly; and hold others accountable when a breach to the PIC principles has occurred by using direct and candid language (Edmondson, 2012, p. 139). PIC can also work to create a decision-making process to create clarity. Hefeitz suggests, “in an organization with an adaptive culture, people in authority do what only they can do and make decisions only they can make. Other tasks and decisions are handled by others capable of doing so.” (2009, p. 169). It will benefit all PIC team members to be clear about who is making final decisions about what. Ultimately, PIC needs to continue to work on improving psychological safety and the evidence shows that one of the highest leverage factors is overcoming negative associations with hierarchy and rank. Actively changing these perceptions through these leadership moves will improve overall psychological safety for the organization (Edmondson, 2012, p. 139).

**Create Accountability**

Having strong psychological safety does not in itself create a DDO or a more effective team. Accountability to pursue and achieve our goals and to adhere to our developmental culture is also critical (Higgins et al., forthcoming; Edmondson, 2012, p. 129). Now that PIC has a set of developmental principles and a newly defined mission and vision, the more challenging work of addressing breaches to one of the principles will begin. I urge PIC to consider, as a whole team, how we might want violations of the principles to be addressed. These considerations should be created as a team, as they will need to be enforced from all areas of the organization.

I also urge PIC’s leadership team to consider the pivotal role we play in setting the tone and priority to do this. The leaders will need to model how to respond when
principle is violated—we will need to first address it ourselves and make our leadership visible to the rest of the team as a guide for how others might also hold each other accountable. Here is where accountability and hierarchy intersect: it will be critical for leadership to be consistent in how we respond to breaches in culture, as that will further build psychological safety (Edmondson, 2012, p. 144). Because PIC desires to be a learning organization, it will be important for all team members to be critical of current processes and knowledge that need refining and changing. To develop this culture, leaders will need to take action if a team member is not showing up in this way, in order to publicly voice and show that violators of the culture will be addressed (Edmondson, 2012, pp. 144–145).

Over time, as leaders model how to hold others accountable and do this consistently, others will feel safe to do the same and a mutually accountable culture will begin to form. Accountability will also need to be celebrated and praised as a means for encouraging this type of behavior and communication. Continuing the monthly team culture survey, debrief, and action planning will support this, as well as continuing regular debriefs and stepbacks.

While not directly related to accountability (although certainly supporting it), I also recommend that PIC consider investing in and creating a learning platform that would be used with program participants. It could also be used to contain internal learning to support the creation of a developmental culture, one focused on learning and growth. This system should house all pertinent culture documents, like our baseball cards, principles, journey lines, etc., as well as workshop resources and debrief and meeting notes. This system should allow for the next steps that come from a debrief or a brainstorm session to be easily put into each person’s virtual to-do list as well as be stored for future use.
This will also support accountability and psychological safety by increasing transparency and decreasing wasted time searching for and recreating documents. If PIC team members had an easier way to visualize and interact with their baseball cards, to easily add and refine them based on feedback received in other settings, and access them to provide feedback and accountability during meetings and workshops, the team would likely be more candid and provide more critical feedback, simply because it is at their fingertips. These structures could also improve innovation and collaboration if PIC had more organized systems for storing past knowledge and could use it more readily to create new workshops, grants, proposals, etc. Ultimately, I believe these types of systems will support an improvement in team capacity, by decreasing wasted time recreating and searching for documents, and it could decrease time spent conducting analysis and project plans. I also believe a learning system would increase transparency about new projects and ideas, as it could also serve as a way to keep all team members informed about the stage a new project is in and create more cohesive collaboration.

Looking Forward

PIC should start to consider how we will bring newcomers into this culture. What are the cultural artifacts we will use to onboard and what experiences need to be carefully crafted to expose and indoctrinate a new person into this deliberately developmental culture? PIC should consider how we will write future job descriptions to lift up their value of adult development and attract others who desire to learn and grow.

PIC can also consider what role we play in the larger sector. I urge PIC to consider how we will share what we have learned about our internal culture with funders, district partners, community partners, and principals. Much can be learned about how an organization creates safety and transparency and the impact that can have on productivity and effectiveness.
**Implications for Sector:**

“To reignite creativity, innovation, and learning, leaders must rehumanize education and work. This means understanding how scarcity is affecting the way we lead and work, learning how to engage with vulnerability, and recognizing and combating shame” (Brown, 2012, pp. 187–88). In Brené Brown’s research on vulnerability and leadership, she has found that cultures that avoid candid and difficult conversations lead to less trust, more negative behavior and mistakes, and lower performance (Brown, 2018). Too often, schools, districts, businesses, and other organizations operate with cultures of fear and mistrust, or cultures of avoidance and politeness. These types of cultures do students no favors. They perpetuate problematic practices that hold up systemic racism, allow mistakes and failures to exist without anyone learning from them, and achieve the same inadequate results over and over again. The education sector needs transformative change, and this change rests with the adults in the system.

Jal Mehta (2019) speaks of creating symmetrical learning experiences for students and their teachers, and the power of teachers being able to experience deeper learning for themselves before creating deeper learning experiences for their children. I argue school districts could transform adult learning by taking on a deliberately developmental culture and particularly by focusing on increasing psychological safety. The education sector as a whole would be transformed by taking on the critical challenge of creating cultures across the ecosystem: districts, nonprofits, philanthropy, community partners, etc., where adults are able to speak up, give and receive feedback, and engage in productive conflict so that they are continuously growing and developing to be the best teachers, principals, and superintendents they can be for their students.

And if the adults are going to operate in this completely different way, then they will need to face their biases and learn new skill sets and mindsets—and to do so schools and districts need to remove the fear of failure, focus on increasing
psychological safety, and begin to celebrate individual growth and development. This is important for shifting cultures to become anti-racist, as individuals will need to be encouraged to speak up, welcomed to be fully themselves, and safe to provide difficult and uncomfortable feedback as they challenge the status quo.

To do this, schools, districts, and organizations should consider creating culture change through an approach that touches on the micro or individual level, meso or team level, and macro or organizational/school level. This must start with a leader (i.e., superintendent or CEO), at the system level, who is willing to model and celebrate vulnerability and create a clear vision for adult culture with aligned policies, where adults can learn transparently from their mistakes, share openly about their learning and growth goals, and speak up when they have an idea or concern. Then leaders should model this for their systems in a public way. Leaders will begin to transform adult cultures from those of fear into learning and teaming with intentional experiences at the team level, where adults can begin to know each other and systems and structures that create learning, like the AAR model, and by celebrating progress along the way.

Superintendents should build adult development and learning into the fabric of organizations, from values and mission to systems and policies, too. Schools can do this by following many different models; one is an 80/20 model, where every person in the organization spends 80% of their time in execution mode and 20% of their time in learning mode. Creating structures that promote individual learning like this, or through others like the baseball cards that PIC used, will create time and space for adults to be seen, so that they can learn.

Schools and school systems should consider what support they provide to the people they employ that goes beyond the work of the mission. Evidence from this change project showed the great impact of the pandemic, systemic racism, and the quickly changing context on the PIC team’s ability to be open and vulnerable. It is clear
that people cannot be expected to open up the most vulnerable parts of themselves while they are also grieving (Henry Ford Health Center, 2018). However, there are supports that can minimize the effects of grief and anxiety, in which companies have a human responsibility to consider. While a leader can follow every step written in a business book about change and psychological safety, if they do not consider how to ensure their people are well, they will continue to lose high-quality people and burn out others, particularly women and people of color (Edmondson & Roloff, 2015, p. 51). Some of these supports could include: paid parental leave for a minimum of 12 weeks, free access to mental health providers, ability to take paid time off to care for sick children, partners, parents, or themselves (such as after a miscarriage), integrating mindfulness practices into meeting structures, etc., in addition to the intentional culture shift towards vulnerability and development.

If our school systems transformed their adult cultures to one of learning and development, centered in full humanity and celebrating progress, then our ways of interacting with one another will change and ultimately impact the way we engage with teaching and learning, creating transformative and equitable learning experiences for adults and students alike.

Lastly, in reflecting on my work with the PIC team and our pursuit of creating psychological safety, I have come to realize that even when strong psychological safety might be present, courage might still be required. As long as there are imbalances of power among members of a team or organization caused by internal hierarchy, personal identity markers, or external systems and structures created to benefit some and not all (i.e. racist, sexist, ableist, etc.), there will never be full and complete psychological safety. A leader can work to create the safety needed for others with less power to be able to speak up, but there will still be some amount of courage needed to share candidly with those who have more power. The goal of psychological safety is for all
people on a team or in an organization to be able to speak up without fear of retribution (Edmondson, 2019, p. 6-7), but in my experience, I have found as long as power is unevenly distributed, there will always be some amount of fear, albeit hopefully quite small. So, leaders will need to consider not just how to create psychological safety but also how to encourage the psychological courage needed for those with less power to be able to speak up in spite of and perhaps even against those in power. In a place with strong psychological courage, individuals will believe speaking up is critical and will trust those with power enough to be able take the risk to share candidly when needed.

**Conclusion**

It has been a great privilege to work with and alongside the PIC team. I am humbled by their openness, vulnerability, and their trust in me to lead. This year they have afforded me an incredible learning experience, and I look forward to our continued shared learning together. This change project points to the need to humanize our companies, organizations, and schools. In every sector, we would all flourish and thrive if we were unafraid to speak our truth, provide honest feedback, or engage in productive conflict. If we knew we could do such things without fear of retribution, we would each add to the collective learning of the places where we work (and live) and improve the overall effectiveness of the work itself through our increased collaboration and resulting innovation. However, it is important to understand that to create cultures where people can thrive, we can’t stop at just improving psychological safety and focusing on the team as the unit. We must go one step further and understand what the individual’s need is to grow in their own capacity and the ability to be candid.

The role of the leader to create this environment is critical. They must be the first to show vulnerability; they must share their growth edges and grooves openly; they must address, forcefully, those who violate the principle of no retribution (including themselves); they must create structures and systems to hold and support the learning;
and they need to consider what support is in place to take care of their people’s wellbeing. Imagine if our schools and our districts were led by individuals who so believed in their people that they spent their time and energy developing them as their greatest asset. Imagine if every teacher and leader were able to speak openly about their challenges and could work together with parents and students to have candid conversations about change. And then imagine if they were supported by district leaders, who also acknowledged their mistakes and edges, and all were working toward their own development, in service of creating a new way of teaching that creates equitable learning experiences. A shift toward adult cultures of learning and a focus on adult development in our schools and districts just might be the key to transforming education for our children.
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# Appendix A

## Scope and Sequence, Initial Plan (July, 2020) and Adjusted Plan

<table>
<thead>
<tr>
<th>Creating a Learning Culture Plan:</th>
<th>What Actually Happened:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>June-September:</strong> Teaming Activities (Enneagram, Journey Lines, Sweet Spots, Core Values, Be Well Lead Well pulse)</td>
<td>We completed each of these activities as well as on 9/3 Be Well Lead Well Assessment and Debrief</td>
</tr>
</tbody>
</table>
| **September 14:** Kick off New Team Meeting and Identify Points of Integration  
**September 21:** Define Current and Potential Culture  
**September 28:** Learn and Practice: What is a DDO? Feedback on team structures and decision on integrating practices. | |
| **October 5:** Learn and Practice: Deep Listening  
**October 26:** Build Home: Share Development Goals  
**During October Check Ins:** Find Edge: SCARF/Pinch Sorting | 10/5 Team began collective conversation on scaling - what is our core? What is our mission?  
10/12 - team began book study on *An Everyone Culture* and discussed chapter 4. I introduced the baseball card idea.  
10/19 AB and I shared our baseball cards and received team feedback. We also gave each other open feedback during the team meeting to model vulnerability.  
10/28 RC began ITC Map and shared during one on one.  
We did not do workshops on Deep Listening or SCARF/Pinch sorting. Based on the conversation about chapter 4, the team decided to pursue the baseball cards next, and I pivoted the plan. Each person is now creating their own baseball card and will share at an upcoming team meeting. |
| **November 9:** Learn and Practice: Appreciations and Admirations  
**November 10:** Strategic Plan Step Back  
**November 16:** Workshop Debrief  
**November 30:** Practice Groove: Giving and Receiving Feedback  
**Throughout,** during check ins begin ITC process - set goals, identify assumptions, and start tests | 11/9 team begins sharing baseball cards  
11/10 first quarterly strategic plan stepback  
*Began using baseball cards to ask for and give feedback during team meetings and one on ones. |
| **December, January, February:** continued implementation of developmental principles and practices.  
12/7 Workshop Debrief  
12/9 Team Building Led by RC  
12/16 Enneagram Follow Up | 12/7 Workshop Debrief  
12/9 Team Building  
12/21 Giving Feedback Workshop  
**January-February**  
1/4 Norms Convo #1  
1/25 Workshop Debrief  
1/25 Norms Convo #2 = PIC Principles  
2/1 Asking for and Receiving Feedback |
### Appendix B

**Team Culture Discussion Notes**

#### Our Current Culture

- Casual, comfortable
- Organic
- Genuinely care about each other as people
- High expectations, especially for external facing documents and products
- Operate thinly/scrap/anyone helps
- Squeeze a lot in to a day/week
- Say yes
- Scaling/growing can lead to ambiguity
- Virtual setting can limit informal interactions with each other - can impact relationships with external partners/feeling non-verbal communication
- Independent/Virtual can lead to less feedback/ideas sharing
- Women of compromise - lost of ourselves in order to prioritize work, try to do everything
- From LNBIW - give more than we expect to receive - put our principals/work ahead of our own needs and our team needs
- Empathetic, high expectations / high output, intentional, adaptive- sometimes to the point of reactive, fast paced.
- Committed to cause/mission
- Adaptive
- Openness to new ideas leads to ambiguity
- Flexible

#### Our Future Culture

- Proactive planning and prioritization to create sustainability
- Intentionally creating our team culture as a model for what we hope our principals are creating for their schools (a place for learning and innovating and being whole)
- Productive conflict and ongoing feedback on work products AND our personal development
- Self-sustaining for team well-being while maintaining high quality output
- Name successes
- Team members feel stimulated, inspired and challenged
- Organic informal culture that values each individual and their personal life
- Bring your “zone of genius” to the table!
- Diversity of experiences/expertise that contribute to our program design
- Manage expectations of outputs - what can really be 80% vs. what needs to be 100%?
- Recognizing when we are pushing ourselves to capacity and what is reasonable to ask of ourselves/our team?
- Culture of proactively asking for feedback (not waiting for it to come)
- Remind ourselves and our team that effort tied to our values/mission is significantly greater than not having everything 100% correct.
- Give 100% drive among 5 things opposed to 20% among 10.
Appendix C

PIC’s Developmental Principles

- We believe that the most effective feedback is clear, specific, and kind.
- We believe our teammates have our best interest in mind but we must be candid for the sake of each other’s growth when we feel pinched.
- We believe in entering conversations with an open mind and engaging with the intent to challenge the status quo.
- We believe in sharing our mistakes and failures as an opportunity for development and learning without fear.
- We celebrate our progress! We believe it’s everyone’s equal responsibility to elevate all voices regardless of rank or org structure.
- We believe adults can grow, we understand growth isn’t always linear, and we actively monitor our and each other’s progress (and bring it to the surface).

*This is an evolving draft.*
Appendix D
Weekly Team Meeting Agenda and Notes Catcher

**Directions:**
1. Please assign yourself a role
2. Please write in any updates you have for the updates and asks portion by end of day Friday - read everyone's updates before the meeting and add clarifying questions you have
3. If you have something to discuss in our brainstorm/problem solve/learn section, please type out what you would like to discuss, a question you have, or a topic you will teach us. If we have more than one, we can decide as a team what to prioritize and when to discuss other items.

**Internal Team Principles (Working Draft):**
We believe that the most effective feedback is clear, specific, and kind.
We believe our teammates have our best interest in mind, but we must be candid for the sake of each other's growth when we feel pinched.
We believe in entering conversations with an open mind and engaging with the intent to challenge the status quo.
We believe in sharing our mistakes and failures as an opportunity for development and learning without fear. We celebrate our progress!
We believe it's everyone's equal responsibility to elevate all voices regardless of rank or org structure.
We believe adults can grow, we understand growth isn't always linear, and we actively monitor our and each other's progress (and bring it to the surface).

<table>
<thead>
<tr>
<th>Upcoming Brainstorm/Learning Topic Ideas:</th>
</tr>
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<tbody>
<tr>
<td>- KB - canva</td>
</tr>
<tr>
<td>- RC - project management</td>
</tr>
<tr>
<td>- RC - managing your inbox</td>
</tr>
<tr>
<td>- AD - reflect on innovations created bc of COVID-19</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Facilitation Rotation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC</td>
</tr>
<tr>
<td>AB</td>
</tr>
<tr>
<td>KB</td>
</tr>
<tr>
<td>AD</td>
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<tr>
<td>CW</td>
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</tbody>
</table>

**Weekly Team Meeting Agenda**

<table>
<thead>
<tr>
<th>Meeting Roles:</th>
<th>Who?</th>
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<tbody>
<tr>
<td>Facilitator (keep us moving along, pull people into the convo)</td>
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<tr>
<td>Note Taker (jot down questions, next steps, or pertinent info)</td>
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<tr>
<td>Time Keeper (keep us on time)</td>
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<tr>
<td>Process Observer (how is this process working for us? How are we doing in relation to our team principles?)</td>
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</table>

<table>
<thead>
<tr>
<th>Agenda Item and Purpose:</th>
<th>Objectives</th>
<th>Updates</th>
<th>Asks</th>
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<tbody>
<tr>
<td><strong>Check In: 10-20 mins</strong></td>
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<tr>
<td><strong>Purpose: Build &quot;Home.&quot; Find out how we are each doing as whole people.</strong></td>
<td>Mindfulness Celebrations</td>
<td></td>
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</tr>
<tr>
<td><strong>Updates and Asks: 10 mins</strong></td>
<td>1. 2019 Cohort</td>
<td>2. 2020 Cohort</td>
<td>3. Alums</td>
</tr>
<tr>
<td><strong>Purpose: Update teammates on progress, recent activities, and any asks of each other's time or upcoming actions. This keeps us in the loop on each other's work and allows us to know what is coming up</strong></td>
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</tbody>
</table>

100
and how we might support each other’s work. These are things better shared verbally than over email. There doesn’t always have to be an update in each area, but we will hold the time in case it is needed.

***Type your updates in here, so we can all read them ahead of time. If you have a question or an ask for a teammate, also include it here. We will only discuss “in person” asks and questions.

<table>
<thead>
<tr>
<th>4. NPA</th>
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<tbody>
<tr>
<td>5. New Pilots and Proposals</td>
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<tr>
<td>6. Marketing</td>
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<td>7. Recruitment</td>
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<tr>
<td>8. Evaluation</td>
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<tr>
<td>9. Development/Fundraising</td>
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<tr>
<td>10. Team Vision and Culture</td>
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<tr>
<td>11. Other?</td>
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**Brainstorm/Problem Solve/Learn: 30 mins**

*Purpose: time to go deep into one topic. This is where we can support each other when we are stuck, when we need the whole team’s thinking, or when we need to make a team decision.*

*Examples:*
- brainstorming/HMW for a new process or template for one of our programs
- getting feedback on an upcoming session topic or deck
- making a decision on facilitators or topics to an upcoming session
- deciding on virtual, in person, or hybrid activities and sessions
- internal mini workshop on a topic we would like to learn more about
- sharing individual learning about a topic

What are you bringing to the team today? Why? How will we engage together? (LIST AS MANY AS WE HAVE, WE WILL DECIDE AS A TEAM WHICH TO COVER)

**Close: 5 mins**

*Purpose: Close out our time together by setting purpose and intention for our week or check in on each other’s state of being.*

Meeting Process and Feedback - how did we live out our principles? How can we improve? One Sentence - How will you grow this week?
Appendix E

Team Workshop Debrief, Agenda and Notes

November Workshop Debrief and Learning Agenda:
PIC Team: Rachel, Amanda, Catherine, & Samina

1. Celebrations
   a. **2019**: group leaning into the wonder session, positive feedback on how it felt to have their well-being prioritized, appreciated talking about it in a different way. Facilitator A’s session - showed vulnerability more than they did in November. From SN: seemed a lot of energy in their breakout groups, enjoyed debriefing together.
   b. **2020**: open, honest, vulnerable sharing, especially during Facilitator A’s session - pivoted easily based on their questions. CW - named each other when they were pushed by a teammate and what they learned from that person. Able to challenge each other and be received well and then share again with the whole group.

2. Intentions and outcomes - *What did you plan to happen? What did happen?*
   a. **2019**: planned - a different spark with danger of a single story to prep them for equity work. Intended to dive deeper into racial consciousness work - understand power. Improv to pivot to design work, project work to integrate equity. Seek new perspectives through Facilitator B’s session.
   b. **What happened 2019** -
      i. Danger of a Single Story - created deep curiosity from them and wished they could go deeper into this. Maybe come back to it.
      ii. Facilitator A - pivoted well on the spot, created a vulnerable and triggering space to get some of the quieter people to move out of comfort zone to share vulnerably.
      iii. Improv - creative catalyst, they had already done the “plan a party” activity, only a few folks got to participate. They were still figuring out where they were from the equity session, but didn’t feel like the right tone. If we did a future session - something that would be turnkey that they can use in their next PD.
      iv. Facilitator B - sought new perspectives but focused more on their wellness and wellbeing. More time spent on their wellbeing.
      v. Microactions & small groups - what will you do next?
      vi. Lunch was chaotic!!!
   c. **2020**: opening w/ improv, self compassion & empathy w/ Facilitator C, compassion for yourself so you can have empathy for others; wonder w/ Facilitator B; Facilitator A on day 2; longer closing circle/reflection/debrief in small groups.
   d. **What happened 2020** -
      i. Opening groups by grade level bands - LOVED IT, going to use those groups again in future.
      ii. Too much in first day - Facilitator C started late, content really resonated w/ them and needed more time, impostor syndrome really resonated - empathy also resonated (she always needs 2 hours)
      iii. Lunch was chaotic - didn’t lend itself for creative thought afterwards.
      iv. Started in grade level bands for reflection, set them up really well for racial equity work (How can I apply this to my level of complexity on campus?)
      v. Ended w/ small groups, longer reflection
      vi. Gratitude circle at the very end

3. Why did that happen? *Name specific actions that led to the outcomes.*
   a. **Lunches**: not everywhere takes tax exempt, getting delivered to all the places is challenging. It was too much for KB to do all at one time (both cohorts at same time).
b. 2019-
   i. Improv - make sure she knows what they already know and have experienced. Could we do something in the spring focused on how to use improv with teachers?

c. 2020-
   i. When we have sessions doubled up - how can we make it feel cohesive, make sure that sessions still flow, even when we have to share facilitators? Lunches were also a bit chaotic and that caused me (Amanda) to feel scattered. I think this made me not able to keep track of timing as well.
   ii. Sessions didn’t flow together as well as I hoped

4. **What will we sustain? What will we grow?** *(connect to the session data where possible)*
   a. Incorporating time each month on wellbeing and focusing on microactions. They want and need time to focus on this.
   b. 2019 wants more time with Facilitator A - happening in January, but how do we keep it going after that? Could we bring her back? Can we do it as a team? How do we get it embedded into future sessions? We need to internally motivate our team to do this ourselves (vs. external equity audit). How do we make this last?
   c. 2020 - Thursday felt chaotic with the amount of content and lunch issues. *I was not as clear with communication with facilitators and participants and it did a disservice to Facilitator B because time and expectations were not managed as well as it could have been.*
   d. RC - prepping for sessions, want to feel more prepared and confident before sessions begin. Last week felt really insane, plus workshops. Led me to not be as intentional about inserting myself. I could have leaned in more during Facilitator A’s session.

5. **Wonderings** -
   o SN observation - one group seems to be less reflective based on their sharing after breakout groups. Example - whose story isn’t being told? Talked about teachers limiting students, but didn’t talk about how they might do this as well as leaders. Don’t share as much about their personal leadership. One group seems like they do this naturally - they jump to a reflection on their own leadership. CW - Facilitator A mentioned the first group are thinkers, in the thinking category - get mad and angry and what to think about it. The other group, she thinks are feelers, they respond with emotion and feel deeply. This was why she adjusted her video for them. RC - Facilitator B felt they were so engaged, reflective, and genuine. Could it be how we tee up a facilitator to work with them? How do we help facilitators to challenge them? Facilitator A’s session went quickly, when we came back from the small group reflections, she brought them back and didn’t feel like Facilitator A pulled them further. Might need more processing time and will sit with quiet.
   o Questions: Is the process time a part of the unwritten culture of the 2019 cohort? If so, do we want to replicate that in the future or do we want to shift from that?
   o In the moment support - how can we intervene during sessions by asking a question? Advocating for cohort needs? Acting as a participant to share vulnerability
   o 2020 has had more opportunities to share about their identities from the beginning. Should dig further into understanding our curriculum moves with 2020 to dig into core values in week 1.
   o *What is the impact of us sharing vulnerably about our own values, identity, leadership to model this for them and to show how brave they can be?*
   o What impact does informal interaction have? 2019 had to shift away from having this so much, whereas 2020 never had it. What impact has this had?

**Next Steps:** **list these by owner**
- AD- look at survey data to try to understand what is the right order for equity work - tools then equity or other
- RC/KB lunch/meals - need to come up with a different plan for a doubled-up session. Could ask P’s for meal vendor suggestions; system for double workshop days & days where we don’t have doubled-up workshops
- CW/Emily - evaluation - how can we understand some of the shifts we have made this year in terms of identity, personal leadership?
• RC - keep microactions in monthly check ins as a group, needed by group
• RC/AD/CW - Prepping facilitators - lets ask them how they would like us to insert ourselves. We know them well, so if we notice they aren’t engaged enough, open enough, etc, how can I communicate that with you?
• RC/CW/AD - use grade level band reflections after sessions to help them think about how to implement what they are learning.
• RC/CW/AD - look at overlapping sessions in spring for alumni to join
• RC/CW/AD - reflect on equity sessions and create plans for through lines for both cohorts
Appendix F

Example of Baseball Card

<table>
<thead>
<tr>
<th>Amanda</th>
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</table>
| **Enneagram** | I haven't decided which I am but I am likely one of these:  
2: The Helper: Twos are a feeling-based type with a focus on relationships. They excel at making connections and empathizing with the needs and feelings of other people. They are usually good at supporting others and helping bring out their potential. However, turning their attention toward themselves and knowing what they themselves need is much more difficult. They want to be accepted and liked by others, and they will adapt or change themselves to earn this approval.  
3: The Performer: Threes are feeling-based types, but they channel their emotional energy into getting things done. They take the initiative and work hard to accomplish their goals. They are highly adaptable, and they excel at “feeling out” and meeting the expectations of others when that will lead them to success. They like to stay active and on the go, so it’s hard to stop or slow down. Their focus on keeping up their image and achieving results can get in the way of personal needs and health. |
| **Values** | Learning, Caring/Empathy, Achieving, Joy, and Authenticity |
| **Journey Line** | Student, leader, teacher, coach, AP, principal, student again, mom, partner, daughter, sister, friend |
| **Sweet Spots** | capability+motivation high = team culture, strategic planning (goals, data), deliberately developmental practices (coaching, feedback), building and maintaining trusting relationships/network, seeking feedback to use to inform decisions and planning  
capability<->+motivation high = longer term strategic planning (scaling and growing), organizational learning systems and design (have skill on small scale, but want to grow in across the whole org), fundraising maybe? program evaluation, virtual teaming and learning, content (facilitators and sequencing) |
| **Lead Well Be Well** | Microaction: Each day, write down one thing I accomplished or feel proud of. Working to grow in self-esteem and energizing others. |
| **You Can Rely on Me…(*Strengths)** | **Help Me Watch Out For… (*Edges)** |
| to utilize experience as a principal in programming. | saying yes to too many things (not prioritizing my time well or not recognizing the impact on others). |
| to give feedback about messaging and rationale and buy-in. | not being realistic about constraints (similar to above). |
| to be passionate about org culture. | holding back on critical feedback, especially when I perceive I have less power. |
| to think strategically and creatively. | over simplifying or not paying enough attention to details |
| | providing clear rationale/messaging to build buy in and to frame the work/meeting/discussion. |
### DDO Questions

<table>
<thead>
<tr>
<th>Statement</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>On my team, when something doesn't go right, we take time to talk about why.</td>
<td>3.75</td>
</tr>
<tr>
<td>Leadership is open about it when they make a mistake.</td>
<td>3.67</td>
</tr>
<tr>
<td>People here say what they really think only behind others' backs.</td>
<td>3.25</td>
</tr>
<tr>
<td>I feel safe telling leadership when I disagree with what he or she thinks.</td>
<td>3.33</td>
</tr>
<tr>
<td>I know my manager's personal improvement goal.</td>
<td>2.67</td>
</tr>
<tr>
<td>This company expects you to keep taking on new challenges at work.</td>
<td>3.75</td>
</tr>
<tr>
<td>In the last month, I have contributed to someone else's learning or development.</td>
<td>4.25</td>
</tr>
<tr>
<td>In the last month, someone else has contributed to my learning or development.</td>
<td>4.25</td>
</tr>
<tr>
<td>In the last month, I have been asked for critical feedback.</td>
<td>3.25</td>
</tr>
<tr>
<td>In the last month, I have given someone critical feedback.</td>
<td>3.25</td>
</tr>
</tbody>
</table>

### Psych Safety Questions

<table>
<thead>
<tr>
<th>Statement</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is difficult to ask other members of this team for help.</td>
<td>3.00</td>
</tr>
<tr>
<td>Members of this team are able to bring up problems and tough issues.</td>
<td>4.00</td>
</tr>
<tr>
<td>If you make a mistake on this team, it will be held against you.</td>
<td>3.25</td>
</tr>
<tr>
<td>People on this team sometimes reject others for being different.</td>
<td>3.25</td>
</tr>
<tr>
<td>It is safe to take a risk on this team.</td>
<td>3.75</td>
</tr>
<tr>
<td>Someone on the team might deliberately act in a way that undermines efforts.</td>
<td>3.50</td>
</tr>
<tr>
<td>Unique skills and talents are valued and utilized on our team.</td>
<td>4.00</td>
</tr>
</tbody>
</table>