Radical Transformation Through Collective Leadership: Supporting a Self-Improvement Journey for the C-Suite Team at PDK International

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Radical Transformation through Collective Leadership:
Supporting a Self-Improvement Journey for the C-suite Team at PDK International

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

Submitted By
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To the Harvard Graduate School of Education
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This capstone is dedicated to:
Odell Tyson (March 30, 1930 – May 11, 2016)
&
Ruby Tyson

I dedicate this capstone to my grandparents Odell and Ruby Tyson. You raised me from a child to a young man in Philadelphia, PA.
You played a significant role in my academic and professional journey. You were the ones who encouraged to never let me forget the importance of education. You were the ones who sacrificed daily, so I could pursue a life filled with purpose. You are my role models and continue to provide me the courage and fortitude to take hold of opportunities while also making sure to “uplift the tribe.”

I will be forever grateful for your love and support.
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Nicole Johnson: To my wife, I want to thank you for all the sacrifices you have made for me throughout my professional and academic journey. You have been selfless and a true inspiration in my life. I am very blessed to have your love and support. Our children, RJ and Nia have provided the joy and passion for me to continue to work on being my best self each and every day.

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It has been a humbling experience to work with three amazing committee members. You provided me much encouragement and challenge. The strength of this capstone would not have been possible without your feedback, and I offer my gratitude for your commitment to my learning.

Cohort 6
I am truly grateful for the relationships established, and I feel blessed to have had the opportunity to learn with and from so many thoughtful, smart, and committed people. C6 we are poised to make a collective impact within and outside the education sector.

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PDK International Staff:
When I arrived in Arlington, Va., I knew that my professional and personal life would be enhanced tremendously. Thank you for welcoming me and allowing me to take part in the emerging culture that is being established with care and concern for business and people development. Thank you for supporting me as a learner – encouraging me through my writing. This capstone is inspired by you and the work that you do.
Table of Contents

ABSTRACT .............................................................................................................................. 5
INTRODUCTION .................................................................................................................. 6
REVIEW OF KNOWLEDGE FOR ACTION ......................................................................... 20
  MANAGING CHANGE ................................................................................................. 21
  LEADING ADULT DEVELOPMENT IN ORGANIZATIONS ........................................... 22
    Adults continue to develop ....................................................................................... 22
    The three levels of mental complexity ................................................................. 23
DELIBERATELY DEVELOPMENTAL ORGANIZATION & IMMUNITY TO
  CHANGE .......................................................................................................................... 26
    Edge: The height of its developmental practices .................................................... 27
    Groove: The breadth of its developmental practices ............................................. 28
    Home: Developmental communities provoke and hold vulnerability ................... 30
    Immunity to change ............................................................................................... 32
    Emotional Intelligence ............................................................................................. 33
DEVELOPING THE C-SUITE TEAM .............................................................................. 34
    Heroic leadership is not enough ........................................................................... 34
    The need for high-performing leadership teams .................................................. 36
    Elements to develop a high-performing team ....................................................... 38
RESEARCH CONCLUSIONS ........................................................................................... 40
THEORY OF ACTION ....................................................................................................... 41
DESCRIPTION .................................................................................................................... 43
  PHASE I DESCRIPTION .............................................................................................. 46
  PHASE II DESCRIPTION ......................................................................................... 48
  PHASE III DESCRIPTION .......................................................................................... 52
EVIDENCE ........................................................................................................................ 54
  ORGANIZATIONAL EVIDENCE ............................................................................... 55
  PERSONAL DEVELOPMENT EVIDENCE .................................................................. 58
DIAGNOSING THE CHALLENGE .................................................................................... 59
ANALYSIS .......................................................................................................................... 60
  A SELF-ANALYSIS ..................................................................................................... 60
    Edge: The height of its developmental practices ................................................... 60
    Groove: The breadth of its developmental practices ............................................ 61
    Home: Developmental communities to provoke and hold vulnerability ............... 62
ORGANIZATIONAL ANALYSIS .................................................................................... 63
    Edge: The height of its developmental practices ................................................... 63
    Groove: The breadth of its developmental practices ............................................ 64
    Home: Developmental communities to provoke and hold vulnerability ............... 65
IMPLICATIONS .................................................................................................................. 70
  IMPLICATIONS FOR SELF ......................................................................................... 70
  IMPLICATIONS FOR SITE .......................................................................................... 73
  IMPLICATIONS FOR SECTOR .................................................................................... 78
CONCLUSIONS .................................................................................................................. 82
BIBLIOGRAPHY ............................................................................................................... 85
APPENDICES ..................................................................................................................... 89
Phi Delta Kappa, International (PDK) was established in 1906 and is a non-profit that works to promote and support the advancement of public education. At the time of my residency, PDK was in the midst of a turnaround and strategic reset: organizational identity, organizational culture, and revenue streams. As it prepared to become a relevant player in the education market, the PDK C-suite team sought to more effectively transform the education landscape through its new innovative services for schools, school district leaders, and the broader education sector.

My residency focused on helping PDK’s C-suite team begin the transformation process internally. The strategic project explored a process that provoked the C-suite team to examine themselves in the work by taking them through a developmental approach to create a shared purpose and collaborative team goal in order to radically change the mindset of C-suite and their practice of collective leadership. My capstone also considered the broader themes of managing transitions, adult development, deliberately developmental organizations, and coaching leadership teams to develop into high performing leadership teams.

The evolution of my strategic project supported a dual approach to capitalizing on change for the organization and myself. The capstone outlines the three phases of my strategic project where I test an improvement process that indicates the need for self-examination and social interaction as a strategy to guide the interpersonal and intrapersonal change necessary to advance collective leadership.

To analyze the strategic project, I use the deliberately developmental organization framework and the 5 disciplines of effective leadership teams. The frameworks allowed me to examine the way in which self-improvement and collaboration affected the C-suite team at PDK International. I conclude that prioritization of an improvement process is a critical component of business and people development. The will to provoke introspection and promote the adaptive work needed for personal and team mastery cultivates the growth minded leadership that is vital for transforming yourself to transform the sector.
INTRODUCTION

“We honor educators as professionals who learn daily from their work and want to share their knowledge with others to transform the lives of their students and their own specialized work. Today, we are transforming into a vibrant social sector organization that will activate educators and other stakeholders to elevate the discourse around teaching and learning to ensure that every child has access to a high-quality education.”

Josh Starr, CEO of PDK (2017)

US public education context

The evolution of public education has been fraught with increasingly complex policy, funding, and talent capacity challenges. In addition, ensuring communities across the country have high-performing schools has been a monumental task. This phenomenon has escaped the most well-intentioned school systems. Today, millions of students attend public schools. In fact, there are more than 100,000 schools, where students are educated by well over 3 million educators\(^1\). Many of the deepest problems in the public education system have not been solved. Student outcome gaps continue to persist and are perpetuated by the opportunity gaps that exist in most urban and rural centers in America. The root causes of these inequities are not without controversy and the push back from those who have benefited from the intentional concentration of privilege has been firm. Further, the need for critically examining this historical and present day fact is paramount for everyone inside and outside the education sector. And, as the U.S population continues to become more diverse, the need to address the fictional narrative that all school systems can be made great without addressing issues of power, racism, and classism will only increase the educational crisis for the most underserved communities across the country.

section, I will explore the history of Phi Delta Kappa International and its impact on the advancement of public education to its present day emergence as a social sector leader seeking to elevate the discourse around teaching and learning to ensure that every child has access to a high-quality education.²

**Phi Delta Kappa**

On January 24, 1906 Phi Delta Kappa (PDK) was founded in Bloomington, Indiana as an all-white male professional organization for educators. “From my understanding it was only white male professors and education leaders that were ‘tapped’ to be a part of this exclusive professional educator society,” said Albert Chen (Personal communication August 10, 2017). Further, PDK started as a graduate honorary fraternity in education. Its major purpose was to form a social network of white male educators while research and scholarship were secondary aims. Not only were the members selected, the universities that represented the initial chapters were considered the finest in America; Harvard, Columbia, Stanford, and Indiana University. The members called themselves Kappans and regarded each other as the leaders in the fast-growing profession of education. Their mission included promoting free public education as a way to forward the agenda of democracy in America (Cole, 1981). However, as student demographics are increasingly becoming browner and students of color account for the majority of US public school students, PDK seeks to emerge as a leader in helping school systems approach their work with a social justice and equity lens. The current challenges in US public education has been an impetus for many conversations around race and class focused on policy implications, research

studies, and human capital concerns at a national level. Presently, PDK International has shifted its core values to not only include social justice, but to intentionally focus its efforts on the issue. The newly created Education Partnerships division was developed to help system leaders reimagine the school experience that leads to successful outcomes for all students especially the most underserved school communities. During my residency, PDK found itself re-examining its brand strategy and market value in the education sector. It appeared that PDK’s new mission was to provoke a critical examination of the state of US public education, and to disrupt policies, systems, and practices that impeded the progress of all students, especially the most vulnerable students and families. PDK, a small nonprofit, with roughly 22 employees dedicated to serving K-12 teachers, school leaders, district leaders, state level administrators, researchers, policy makers, and professors of education was determined to establish a new national strategy.

**The decline of PDK membership**

Traditionally, PDK relied on its membership association as its primary source of revenue. However, membership has declined drastically over the last ten years, from a peak of 100,000 members to just around 15,000 active members. More alarming was that a large percentage of its membership were between the ages of 60 and 65. In addition, it has not been able to attract membership of educators between the ages of 25-30.

The membership decline was particularly concerning since membership was the most significant revenue stream for the organization. Within the last year, PDK has had to wrestle with cost cutting measures, leading it to completely shut down operations in the Bloomington, Indiana, office. The organization now operates solely out of its Arlington,
Virginia, office. The structural changes and uncertainty, unsurprisingly, affected staff morale and culture.

**The leadership of Dr. Joshua Starr and PDK turnaround**

In the beginning of my residency, Dr. Joshua Starr stated that the C-suite team\(^3\) at PDK was a nascent team that was still trying to figure out how to best work with one another. Further, all three C-suite executives had been with the organization less than three years. Dr. Joshua Starr, chief executive officer (CEO) at PDK, had worked in public school systems. Prior to PDK, his most recent role was the superintendent of Montgomery County Public Schools. Dr. Gislaine Ngounou, chief program officer (CPO) at PDK, had worked in public school systems as well. Prior to PDK, her most recent role was chief of staff at Hartford Public Schools. Mr. Albert Chen, chief operating officer (COO) at PDK, had worked in the for-profit sector. Prior to PDK, he had spent more than a decade working for Kaplan testing services. “Each C-suite member brings different strengths to the C-suite team at PDK and we have explored and talked about our skill sets,” said Dr. Starr (personal communication July 2017). In addition, Dr. Starr would discuss areas of growth in his one on one meetings with Dr. Gislaine Ngounou and Mr. Albert Chen. However, there was no evidence of a developmental process or structures for individual C-suite members or the collective C-suite team to improve on their areas of growth in order to bring their individual and collective best selves to the work at PDK International for their internal C-suite team and external stakeholders. Further, during my residency time, PDK was in a serious choice moment. Given this reality, Dr. Starr, CEO, was focused on transforming, rebranding and

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\(^3\) PDK refers to the C-suite team as the senior executives of the organization – Josh Starr, Chief Executive Officer, Albert Chen, Chief Operating Officer, & Gislaine Ngounou, Chief Program Officer
developing new revenue streams to allow PDK an opportunity to survive and then thrive in a very different milieu.

Consequently, PDK has had to retool and change the way it operated or face the very real danger of shutting its business forever. Dr. Starr, CEO of PDK International, was brought on to steward this difficult, complex transformation. The PDK International Board chose Dr. Starr, a progressive education leader, to address the hemorrhaging challenges of the organization. At the crux of the matter was PDK’s financial viability. Moreover, PDK found itself in a position similar to many organizations that failed to stay ahead of changing market demands.

Dr. Starr had been with PDK for roughly two years and sought to turnaround the organization and recapture the market relevance, financial stability, and social impact that it once coveted in the education sector. Essentially, Dr. Starr faced the task of either establishing a fresh, new thriving era at PDK International or shepherding its demise. Based on the evidence gathered, Dr. Starr had several improvement outcomes for PDK. Nonetheless, there was one urgent goal that he communicated with all staff frequently and that was to diversify revenue streams as a matter of PDK’s survival. Historically, PDK had been entirely self-funded through its membership association. However, given the current context, Dr. Starr stated, “our revenue strategy will need to shift to become one-third membership association, one-third fee for service, and one-third philanthropic funding. This will be the future vision for PDK’s financial viability” (Senior leadership team meeting, September 7, 2017).
The challenges of turnaround and strategic reset

During my residency, PDK has been running on a deficit budget, which meant that PDK was seeking to spend more than it makes in an effort to generate revenue. However, PDK’s leadership understands that it cannot survive very long with this approach as its reserves are becoming susceptible to depletion as its debt becomes insurmountable. Therefore, PDK was and is seeking to have a balanced budget by fiscal year 2019. In addition, Albert Chen, COO, has regularly spoken about the importance of meeting revenue goals to insure the future sustainability of PDK. On all fronts, there seemed to be a clear push for a strategy that would promote getting PDK to a financially healthy place.

Concurrently, Dr. Joshua Starr wanted to establish a learning and growth culture, in which staff that were doing the work had the necessary supports and tools needed to increase the likelihood PDK actualized a market presence.

In the midst of these challenges for the organization, Dr. Joshua Starr recognized the moment as an opportunity to reinvent PDK to become a relevant player in the education sector by creating a strategy to chase the demand at all levels of the educational landscape related to practice, research, and policy. Further, PDK sought to diversify its professional services by broadening its current portfolio. During the fiscal year of 2018, PDK was operating under a deficit based budget. The C-suite team at PDK which are the senior executives comprised of Dr. Joshua Starr, chief executive officer, Dr. Gislaine Ngounou, chief programs officer, and Albert Chen, chief operating officer, were tasked with turning around PDK and making it financially viable. The C-suite team had been together for roughly 14 months and had been mired in evaluating and redesigning past practices, systems, and structures. Consequently, they had instituted new policies and practices that
they believed were essential for a well-functioning organization but were nonexistent at PDK prior to their arrival.

Furthermore, PDK was readying itself for its own internal transformational change to re-emerge as a relevant actor in the education market. It appeared they were looking to provide services for future educators, professional educators, schools, and school systems throughout the country. And the ultimate goal was to ensure those partnerships cultivated positive impact for America’s public school children and increase the opportunities for all students to thrive, especially the most underserved students, families, and communities.

Therefore, PDK was and is seeking to reimagine the way it operated in the education space by enacting its mission through targeted networking, research and service. Nevertheless, it had been met with some turmoil. Nicole David, Executive Associate, reflected, “staff was very anxious at the beginning of Josh’s tenure, we had people resigning and being reassigned to new roles. I clearly sensed the anxiousness of our remote staff, and it was intense” (personal communication November 8, 2017).

Further, under the new leadership of Dr. Joshua Starr who had become CEO of PDK on June 8, 2015, PDK was in the beginning stages of a turnaround effort with several reset scenarios to diversify revenue capabilities and increase market relevance in the education sector. Prior to Dr. Starr’s tenure, William Bushaw, former CEO, placed his bets on the rebirth and future success of PDK on Educators Rising. Educators Rising, a division of PDK International, focused on cultivating highly skilled future educators by guiding young people on a path to becoming accomplished teachers, beginning in high school and extending through college and into the teaching profession.⁴ Therefore, PDK’s past

⁴ “Educators Rising A Division of PDK.” Educator's Rising, www.educatorsrising.org/
strategy shifted most of its operational budget to the development of Educators Rising. After reviewing the budgetary impact of Educators Rising with Albert Chen, COO, Josh looked at PDK’s path forward differently. Clearly, Dr. Starr was seeking to lead PDK in a different direction than his predecessor. “Educators Rising was not set up to be a loss leader; however, we were not making a profit, rather we had invested roughly 4 million dollars with not much to show regarding social impact or future profitability,” said Albert Chen (C-suite team meeting October 26, 2017). In addition, Dr. Starr was very concerned with co-directors Ashley Kincaid and Dan Brown’s strategy. “I believe we may need to look at the adult market; however, I am getting a lot of resistance from Dan and Ashley,” said Dr. Starr (C-suite team meeting October 26, 2017).

Further, PDK was in the process of hiring eight to ten new employees across the 7 divisions. Some employees would be working with one specific division; however, three out of ten would be working with multiple divisions, which could have caused an increase to the internal tensions of resources in regard to the percentage of individual employee’s time given for each division. However, the hiring process had created an opportunity to include cross-functional interview teams. The interviewing of candidates across PDK divisions had been very helpful because it engaged staff members across multiple divisions, which led to staff members collaborating in a meaningful way and feeling valued.

Additionally, the C-suite team was in the initial stages of defining who they wanted to be for each other and their external stakeholders. Therefore, they began to organize how they sought to refine internal processes to create a collaborative culture at PDK. Based on this nascent frame, there was an opportunity for me to support the C-suite team with
developing a shared purpose (see Appendix A for shared purpose protocol) and collective leadership approach. Many staff members believed more needed to be done to cultivate a strong collaborative culture. In a lunch meeting with Dan Brown, co-director of Educators Rising, he wanted to share his views with me on the strategy refresh process at PDK International. “I am not sure what has been done if anything to foster trust during this turnaround process, and I am not sure if our leadership team of Josh, Gislaine, and Albert understands each other very well,” said Dan Brown (personal communication, August 16, 2017). Further, most staff within PDK expressed a belief that the C-suite team wanted divisions to work together and streamline activities for increased efficiency, but none of the staff could articulate how to apply the interdependent approach in their daily practice to support each other’s work. “I know in theory we want to be much more collaborative, but we have to show staff how we intend to accomplish this,” said Dr. Ngounou (personal communication October 4, 2017).

My aim

“Life is a process during which one initially gets less and less dependent, independent, and then more and more dependent.”

~ Mokokoma Mokhonoana

This capstone examines my pursuit to support at Phi Delta Kappa International (PDK) in the development of a shared purpose and to engage the C-suite team (Dr. Starr, Dr. Ngounou, and Mr. Chen) in a process to develop a shared purpose, team improvement goal, and collective leadership strategy. Ultimately, my hope was to support the social engineering of a new strategy (see Appendix B for strategic project timeline) for collective impact within C-suite at PDK International. Additionally, I wanted to enhance my emotional intelligence and leadership capabilities by engaging in the same reflective work
and practices facilitated by me with C-suite. This two-pronged approach to residency was the catalyst to help radically transform PDK and myself.

In my role as an Ed.L.D. residency fellow, I worked directly with the education partnerships division. Education Partnerships, a division of PDK International, partners with system leaders around the country to define problems, design solutions, and drive transformation through a social justice and equity lens in order to create the conditions for a more equitable society by improving outcomes for communities, families, and students, especially with our most vulnerable populations. In addition, I supported the internal strategic reset of PDK’s organizational identity, culture and human capital development. My direct supervisor was Dr. Gislaine Ngounou, chief program officer, division director of education partnerships, strategy lead for PDK’s internal growth processes, and a newly added role of programming for Educators Rising. About halfway into my residency, her role expanded to programming director of Educators Rising caused by the resignation of the co-directors Dan Brown and Ashley Kincaid. Dan Brown resigned in November 2017 and Ashley resigned in January 2018.

For my strategic project, I focused on C-suite as my unit of analysis. Specifically, my strategic project would support C-suite in creating a shared purpose, collective improvement goal and peer coaching structures. My goal was to immerse C-suite in this cognitive improvement approach and to have them pilot the immunity to change process together as a senior executive team in hopes of having them embrace this developmental approach as a journey for themselves and a pathway for developing structures and practices centered on helping PDK align its organizational identity, culture, and leadership with business strategy. If successful, C-suite and staff would integrate a radical new way of
living a learning and growth culture focused on collaboration. Essentially, my expectation was to set PDK on a path to develop the habits of mind and behaviors to build a strong culture of togetherness. Further, I would provide recommendations to help C-suite design daily, weekly, and monthly practices that would begin a new normal of how organizational and people development actualized into everyone becoming better versions of themselves. Additionally, I used this change project to incorporate my personal leadership development journey by reflecting on my assumptions, learnings, and challenges. I found this dual process to be a powerful learning experience, and it helped me to better understand the new learnings of transitions, adult development, and team development in a more authentic way. It was my goal to integrate my leadership and self-improvement journey into the residency experience to enhance my mindset and behaviors in leading myself and C-suite to develop into the best version of ourselves.

In a one on one meeting, Dr. Joshua Starr, CEO of PDK, stated, “I want to develop more coherence with my C-suite team – We seem to get along well enough, but I think we have some work to do before we can call ourselves a team” (personal communication, January 24, 2018). Dr. Starr’s articulation really resonated with me, I observed the C-suite team very closely for 6 months and individually and in pairs they are a dynamic group. However, as Dr. Starr indicated they are not yet functioning as a coherent, high performing team. In my prior role as an organizational consultant with a mental health agency, I noticed multiple challenges Dr. Starr faced trying to lead initiatives based on his mission and vision. And, as we know, cultural changes do not occur absent of effective leadership, and efforts to change culture are the key (Quinn & Quinn, 2016). Dr. Starr’s leadership was critical to implement the changes
needed at PDK, and I was excited to help him organize and design the key components of that change.

The focused practices built into my strategic project took C-suite beyond big thinking and general theories, and dove deeper into tangible tools, processes, and adaptive behaviors needed to support PDK in addressing business and people development. I structured the learning experiences with C-suite by taking them through a team development process designed to advance a shared purpose and an internal team improvement goal by using the immunity to change approach. The intervention was centered on helping C-suite develop a collective leadership approach at PDK International. The learning would be driven by C-suite engaging in a series of actions that prompted them to set a team improvement goal that was dependent on each C-suite member contributing to the collective goal. In the process of going through this journey, I expected C-suite to increase coherence and collaboration based on who they wanted to be for each other and external stakeholders. In addition, external stakeholders would be a contributing factor based on collected survey data, personal interview data, and meeting data to gain further insight into helping C-suite clarify its improvement goal.

**Personal Context**

“Owning our story can be hard but not nearly as difficult as spending our lives running from it. Embracing our vulnerabilities is risky but not nearly as dangerous as giving up on love, belonging and joy – the experiences that make us the most vulnerable. Only when we are brave enough to explore the darkness will we discover the infinite power of our light.”

~ Dr. Brene Brown

As I thought about my leadership story, I knew residency was an opportunity for me to construct new beginnings in my leadership narrative. During my school leadership experiences in Philadelphia, I was a task master and did not build collegial relationships
with my faculty and staff. Essentially, I was prepared to be a turnaround leader. I was trained to disrupt and enter a school building like a tornado first and a master builder second. Further, my focus was to fixate on student test scores and other technical aspects of school leadership. As a turnaround leader, I was there to make “substantive” course corrections early and fast. However, those substantive fixes were merely surface level symptoms that would not lead to sustainable change.

In reflection, I am quite certain that I need to make amends with numerous people that were the recipients of my top down and very technical leadership approach. However, I have also come to realize that the leadership approach that I displayed in the School District of Philadelphia decreased my energy level. On the other hand, the engaging, caring, relational leadership style I initiated as part of my residency increased my energy level. It felt like my spirit was awakened, and it seemed very natural for me to use engagement as a way to cultivate trust. In the middle of my residency, I concluded that my leadership preference was actually the opposite of what I presented and was acclimatized to being in my school leadership experiences. This was a powerful moment and a deciding factor to include myself in the strategic project scope of change. In spite of my past leadership actions, I knew that change was possible if I developed new habits of mind and pursued new patterns of behavior in my daily interactions with staff and C-suite.

As I began my residency journey, the type of challenge faced by PDK really resonated with me based on my prior leadership experience, and I gladly embraced the ambiguity inherent in supporting the work of resetting PDK’s organizational identity and culture. Additionally, I hoped the opportunity would provide me a safe space to practice vulnerability and to increase my own leadership capabilities. I saw this residency as a
terrific opportunity to transform my leadership in real-time. Although I was extremely nervous and hesitant, my goal was to use this authentic approach as a strategy to manage up in a new organization. I wanted C-suite and staff to get to know me in a meaningful way. My engagement with supporting the work C-suite and my assessment of their current lived context would be much easier for them to digest and have an appetite for my proposed interventions. The stakes were high at PDK and for me to accomplish the impactful adaptive work needed to radically transform and reset culture, then I needed to test my own assumptions about building trust. The learning and the demonstration of my leadership in these roles helped set me on a path to become more vulnerable. I realized the power of engagement to build trust and influence new ways of thinking and doing with others.

**Overview of the Capstone**

In the next section, the review of knowledge for action (RKA), I integrate key literature I used to help me think about the work I would take on in my strategic change project. At the end RKA I outline my theory of action. In each subsequent section, I will also be incorporating my personal development journey along with the organizational strategic change project. After the RKA, I outline the description of my strategic project by detailing the *what* and *how* things unfolded with my strategic project. Next, I will give my evidence to date of progress related to my stated goals. And then, I will discuss the *why* and determine why things unfolded the way they did. Fifth, my capstone will include implications highlighting key reflections and learnings for self, site, and sector. Lastly, I will conclude with a summary of critical learnings and insight that I obtained through my strategic project.
“Changes are inevitable and not always controllable. What can be controlled is how you manage, react to and work through the change process.” ~ Kelly A. Morgan

**Essential Question:** What does the literature say about change management, adult development, and senior executive team development as a strategy for maximizing both business and people development?

It should be quite apparent that PDK International was in a state of uncertainty, and strategic change was a needed intervention. Therefore, in order for me to understand fully the scope of my supportive role, I started with identifying literature that emphasized change management. After reviewing the literature, I hoped to become more knowledgeable about the impact of transitioning an organization. Therefore, the Review of Knowledge for Action (RKA) is divided into three parts. In the first section, I examined literature focused on change management, and I explored research focused on supporting organizational effectiveness with transitions that exist with strategic reset. In the second section, I investigated leading research on adult development to explore a learning and growth orientation for leader and organizational development and gained crucial insight into brain research on the levels of mental complexity in adults. This portion of the review explored the literature on Immunity to Change and Deliberately Developmental Organizations (DDO). Specifically, I focused on DDOs three dimensions of edge, home, and groove. With each principle, I outlined the theory or behavioral process associated with edge, home, and groove (Kegan, Lahey, Miller, Fleming, & Helsing, 2016). Lastly, I delved into the literature examining the processes of developing a well-functioning senior executive...

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team through the five disciplines of high performing teams and collective leadership to support the alignment of culture, talent, and leadership with business strategy. This research considered senior leadership team development as critically important because of the challenges leaders are facing today and the impact potential of senior executive teams on internal and external stakeholders. The section also includes a brief rationale for the selected frameworks I used to guide my strategic project. The RKA section ends with my theory of action, which is the linchpin for my strategic project description.

MANAGING CHANGE

For several decades, researchers across multiple disciplines have written about change management and how complex organizational change can be for senior executives (Adams, Gaffney, & Roberts 2014; Bridges, 2009; Creasy & Taylor, 2014; Prokesch, 2009; Sirkin, Keenan, & Jackson 2005). There are various approaches to change management highlighted by experts in the field. Bridges (2009) outlines what it takes to lead an organization through a successful organizational change management process. He/she posits that it is not the change itself that is hard, but the transitions. Bridges states that “change is situational; transition, on the other hand, is psychological; it is a three-phase process that people go through as they internalize and come to terms with the details of the new situation that the change brings about” (p. 3).

Figure 1: The three phases of transition

![Figure 1: The three phases of transition](image-url)

Source: Bridges, 2009, P. 5.
In recognizing the tremendous challenge of organizational change and transition, Bridges (2009) underscores the importance of helping people through three phases of the change process. First, people must be helped through their sense of loss by creating a space for people to separate themselves from their old identity and ways of operating. Second is a phase where the old habits of mind and ways of doing things are not quite gone; however, the new way is not fully baked. So, Bridges (2009) calls this the neutral zone because of the critical point in time between new and old where people are readjusting their thinking and behavior. Lastly, is the new beginning phase where people are ready to experience the reset of the organization and embrace the new sense of purpose (Bridges, 2009).

Ultimately, senior executives must be aware that success lies in whether staff embrace new approaches antithetical to prior practices. Each of the phases represent an opportunity for staff to be considered at a strategic move the organization makes to bring people along a process of change. Clearly, PDK was an organization that needed to reinvent itself for sustainability and impact in an ever-changing market. Understanding what PDK staff members experienced during their transitional period was necessary for helping C-suite plan its next strategic moves.

LEADING ADULT DEVELOPMENT IN ORGANIZATIONS

Adults continue to develop

Next, I considered what conditions might be critical for an organization to be effective in developing its staff. Most successful organizations are determined by its financial or social impact outcomes, but not much attention is paid to the people who deliver those results. Much like adolescents, adults need an environment that affords them the opportunity to learn and grow. Designing systems and structures to support adult
development is a key component to business and people development in an organization. Therefore, senior executives must have a thorough understanding of the research exploring adult development.

According to Kegan and Lahey (2016) “brain scientist now they talk about neural plasticity and acknowledge the phenomenal capacities of the brain to keep adapting throughout life” (p. 59). Kegan and Lahey (2009) conducted longitudinal research regarding the levels of mental complexity in adulthood and concluded that adults can continue to evolve after adolescence despite past brain science research saying the contrary. “They further demonstrated that each qualitative leap forward enhances not only people’s ability to see (into themselves and their world) but to act more effectively as well” (p. 12). This phenomenon is significant for organizations to consider as a strategy for human capital. “Experts on organizational culture, organizational behavior, or organizational change often address this subject with a sophisticated sense of how systems impact individual behavior, but with a naïve sense of how powerful a factor is the level of mental complexity with which the individual views the culture” (Kegan et al., 2016 pg. 63)

**The three levels of mental complexity**

Regarding the need for a people development strategy at PDK, I was immediately drawn to Kegan and Lahey’s three levels of mental complexity, which is comprised of the socialized mind, self-authoring mind, and self-transformational mind. According to this framework, “there are qualitatively different, distinct level (the plateaus); the demarcations between levels of mental complexity are not arbitrary. Each level represents a unique way of knowing the world. Development does not unfold continuously; there are periods of stability and periods of change. When a new plateau is reached, we tend to stay on that
level for a considerable period of time” (Kegan et. al., 2016, p. 60). Essentially, each level is characterized by a different level of an adult’s mindset and their level of sophistication in making decisions, analyzing information, and providing feedback in an organization.

Kegan and Lahey (2009) define the socialized mind as characterized by someone who takes direction and needs to feel secure by getting other people’s approval. This mindset typically receives information from an authority figure and rarely questions the order or the resulting outcome. Next, they define the self-authoring mind as someone who filters information based on their own beliefs system therein taking information and identifying what sounds useful to him or her. This mindset is regulated by what a person believes to be true and valid based on his or her own meaning making agenda. Lastly, they describe the self-transforming mind as being able to hold their idea and other ideas as objects. Nevertheless, only a few people reach the self-transforming status. However, the people that do can realize their own limitations and beliefs while looking at others to enhance their meaning making system (p. 44).

Figure 2: Three levels of mental complexity
In *An Everyone Culture: Becoming a Deliberately Developmental Organization* (DDO) Kegan et al., (2016) highlight that many organizational leaders fail to realize the implications of the three levels of mental complexity and its impact on job performance. Understanding the levels of mental complexity is a key feature in the DDO framework, which I will discuss in the subsequent section. Further reading confirmed my suspicion as Kegan et al., (2016) state “a DDO is deliberately developmental precisely because it intersects continuously with its members’ developmental position, whatever that position is, offering invitations for them to grow beyond the limits of their current mind-sets, if they are ready for the move (pg. 67). In other words, the research suggests that the higher one’s level of mental complexity the higher his or her performance will be.

To illustrate the link between levels of mental complexity and work performance, I examined a study referred to by Kegan and Lahey in *Immunity to Change*. Keith Eigel’s study assessed the level of mental complexity of twenty-one CEOs of large, successful companies, each company an industry leader with average gross revenue of over $5 billion. Eigel’s results indicate that increased mental complexity and work competence, assessed on a number of dimensions, are correlated. Consequently, not only is it possible to reach higher planes of mental complexity, but such growth correlates with effectiveness, for both CEOs and middle managers (Kegan & Lahey, 2009, p. 62). Moreover, organizations that focus strategic efforts on adult development have a monetary and human capital return on investment. Organizations should reimagine strategic investments in adult development using time and resources within the day to day work culture. Typically, organizations see

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professional development as an add-on or nice to have outside of the daily functioning of work interactions and performance. However, research shows that a lack of internal professional developmental inputs is detrimental to business outcomes (Kegan et al., 2016).

As research continues to evolve around adult learning and growth, I realized the importance to introduce these findings to C-suite. The research also contributed significantly to my approach in helping C-suite uncover their individual levels of mental complexity for deeper analysis and my own self-analysis. Kegan et al., (2016) theory confirm the effect of knowing your own level of mental complexity for self-awareness, improvement, and more importantly for organization leaders to foster systems and practices to develop higher levels of mental complexity with themselves and their staff.

The Deliberately Developmental Organization and Immunity to Change

“A Deliberately Developmental Organization prescribes a radically new paradigm of organizational life. That valorize the growth of every organizational participant and engage in unrelenting discipline to make every aspect of organizational life a forcing bed for that growth. This is a profound challenge to our conventional notions of how to achieve exceptional organizational performance.” -Harry Spence (2016)

Kegan et al., (2016) provides the DDO framework as a scientific approach to enhancing business and people development for organizations. The literature challenges leaders to consider how best to create workplace cultures that are profitable and, at the same time, cultivate learning and growth with all staff. Therefore, in this section I dive into the deliberately developmental organization (DDO) framework to inform my work with C-suite. The three components of DDO – edge, groove, and home provide a detailed view into a new paradigm of organizational identity and culture. Kegan et al., (2016) highlight the three dimensions comprising twelve features, that they call discontinuous departures:
departures from familiar, business-as-usual principles, practices, and structures. By discontinuous the authors refer to the twelve features being a qualitative departure from traditional business practices of organizational development. Essentially, it is a continuous and immersive focus on people development for every person in an organization (pg. 86).

**Edge: The height of its developmental practices**

Before residency, I had spent some time studying adult development within a mental health agency. I found the important components of my past learnings within the edge dimension of the DDO framework. The psychologist I studied with often referred to adult development as the crux of healthy professional and personal evolution. The Edge dimension explores four features that identify adult development as necessary for organizational success. Kegan et al., (2016) indicate the first principle is adults can and need to keep growing. Organizations are challenged to design inputs that supports the growth of its staff. Additionally, organizations should help staff members identify an improvement goal that would be valuable to the company (p. 87).

The first principle is adults can grow, and it focuses on improving staff who do the work by implementing systems and practices in the day to day operation of the organization. In this sense, every staff member would be working on improving themselves on a daily basis and everyone in the organization would know their colleague’s goal and be able to support each other’s growth.

The second principle is that error is an opportunity. According to Kegan et al., (2016) a DDO enables people to unmask their weaknesses and value their growing edge, and experience themselves as still valuable even as they make mistakes because they can potentially imp is they can overcome the limitations they are exposing” (p. 92).
The third principle implores organizations to run on development principles. This principle highlights the importance of staff and leadership embodying developmental practices and mindsets on a daily basis. “In a DDO, the North Star of the organization is a set of deeply held principles that animate daily decisions” (Kegan et al., 2016, p. 93). The driving force behind what makes DDO’s powerful is the explicit focus on growth.

The fourth principle is the bottom line is all one thing. Here the authors express a key aspect that erases the dichotomy of profit or staff development. To a DDO there is no such distinction. Profitability and cultivating individual growth in staff are part of a single whole, which means each depends on the other (p. 96).

**Groove: The breadth of its developmental practice**

A DDO’s edge is significant in that it sets the stage for leaders to better understand the importance of development. However, it is not sufficient by itself to develop people to become better versions of themselves. Without implementing practices to spur growth, an organization is just conscious of what needs to be done without enacting the moves necessary for success. The *Groove* dimension provokes staff development by engaging individuals in a set of practices that spawn growth. The first principle is that destabilization can be constructive. In this principle, DDOs create a what’s next scenario for its employees to grow. In other words, once you have mastered a task or skill you are expected to move to the next challenging role or function within the organization. “If you can perform all your responsibilities at a high level, you are no longer in the right job” (Kegan et al., 2016, p. 98).

The second principle is mind the gaps. Here the authors refer to avoidance as a never ending quest to keep ourselves safe from conflict, hiding our knowledge gaps, and
not asking for help. According to the authors, a paradox is at play regarding genuine business issues because these concerns are more discussable only after the organization implements ways of talking and working through the nonbusiness issues that keep individuals from bringing their best selves to the work (p.102). This reminds me of my school leadership experience. I had been a high school teacher and assistant principal for 11 years before I was asked to lead an elementary school. And I would spend an enormous amount of time pretending to know what I was doing rather than seeking guidance and help from expert teachers.

The third principle speaks about setting the time scale for growth, not closure. Traditional organizations may look for short cuts and take great strides for perceived efficiency. However, DDOs are more concerned with effective outcomes that are sustainable and minimize recurring versions of the same problem. “By addressing the personal and group root cause, DDOs invest time learning and growing now for everyone in order to create the conditions for even greater success in the future” (Kegan et al., 2016, p. 105).

The fourth principle focuses on the interior life being part of what is manageable. Most organizations only focus on tangible processes and what is easily measurable as a way to measure success and growth. Conversely, a DDO is also concerned with inner states of being and showing up in the work. The intangible workings of mind chatter in a DDO is a critical part of job performance and improvement. Kegan et al., (2016) seek to explicitly uncover and overturn the notion that work is public (external), the personal is private (internal), and so the personal should be excluded from the work (p. 106). I used to wonder
as a teacher how to keep myself totally separate from the work. And this goes along with my strategy to integrate who I am as a leader throughout the capstone.

**Home: Developmental communities to provoke and hold vulnerability**

“A DDO’s groove, its set of practices, permits individual to work on their growth edge. But none of this can happen in the absence of a special of community” (Kegan et al., 2016, p. 107). The last dimension is *Home*. In this dimension, the workplace cultivates an ecosystem where people are engaged and valued for who they are as human beings. This is the cornerstone to creating a working environment that invites individual growth and practices for business and people development.

The first principle explores that rank does not have it privileges. In a DDO, seniority or position within a company does not provide a person with a monopoly on ideas. Therefore, regardless of position, the best idea will always take precedence over rank. Additionally, everyone is involved with their own growth process. In my former role as a principal, I would always determine what was the best direction for professional development of staff. However, I did not afford teachers the opportunity to provide me feedback on my developmental needs as a leader. A DDO requires everyone to keep growing.

The second principle is that everyone does people development. In most organizations when something is everyone’s responsibility, it means no one is doing it, and it isn’t getting done; but in a DDO, it is everyone’s responsibility, and it’s getting done every day” (Kegan et al., 2016, p. 111). Because people development is an integral part of the daily routine in a DDO, it is a core part of strategy, business activities, and culture.
There is no separation between the three. It is all part of one whole. Therefore, it is not seen as an additive or something done outside of the company; it is baked into the organization.

The third principle is everyone needs a crew. According to Kegan et al., (2016) it is extremely important in a DDO for everyone to have a crew that can be counted on to be a container of your vulnerability-inviting you to see your blind spots and triggers-and also to nurture your development because of your vulnerability (p. 114).

The last principle is that everyone is responsible for building culture. In a DDO all staff members are important to shaping organizational culture and are expected and invited to be engaged in the redesign of continuous improvement of systems, practices, and growth strategy. Kegan et al., (2016) point to a DDO organization, “At Bridgewater we have a set of principles, but we do not want people to merely follow them. We want people to engage them, wrestle with them. Follow them if they make sense. And if they don’t we want people to fight like hell to get them changed, show us why they don’t make sense” (p. 115).

**Figure 3: Deliberately Developmental Framework**

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7 Bridgewater is an investment firm that manages roughly $160 billion for approximately 350 of the largest and most sophisticated global institutional clients including public and corporate pension funds, university endowments, charitable foundations, supranational agencies, sovereign wealth funds, and central banks.
Immunity to change

Kegan et al., (2016) offers an organizational framework on becoming a Deliberately Developmental Organization as a scientific approach to help organizations more effectively lead for both business and people development. First, edge uncovers that adults can grow and their development is critical to the success of organizations. Second, groove explored systems and structures needed to integrate DDO practices into the DNA of organizations. Third, home focuses on creating the container that fosters a culture of trust and vulnerability. This previous portion provided me with content knowledge that highly informed my residency work, but the tangible process of the Immunity to Change Approach (ITC) both informed my strategic project and gave me a more practical lens to drive real change in my residency. According to Kegan and Lahey, (2009) ITC is about leading improvement by taking individuals or teams through a process to meeting an adaptive challenge that requires, first, and adaptive formulation of the problem (i.e., we need to see exactly how the challenge comes up against the current limits of our own mental complexity), and, second an adaptive solution (i.e., we ourselves need to adapt in some way)” (p. 57). Through my professional knowledge and experience with facilitating and leading senior level professionals in mental health agencies and at the Harvard Graduate School of Education Programs in Professional Education course, (Including Ourselves in the Change Equation: Personal learning for Organizational Performance) I found a critical connection with the three components of a DDO and Immunity to Change. ITC allows participants to create a picture of their immunity to change, which surfaces an optimal conflict. There are three dimensions of immunity. Kegan and Lahey (2009) posit at the most practical level, an immunity map provides a clear picture of how people are actively
preventing the very change they hope to make. Next, it highlights how a given place in the continuum of mental development for people is at once a way of knowing the world and of managing anxieties. Thus, it uncovers another dimension in the way persistent anxiety is managed, and third, the epistemological balance that must be maintained if people are to maintain their way of knowing and being in the world (p. 91). ITC introduces an explicit method for both cognitive and behavioral change.

**Emotional Intelligence**

In addition, adult development, growing levels of mental complexity, DDO, and Immunity to Change require other ingredients; such as emotional intelligence (EI). EI is needed for people to be aware of their own level of leadership and adult development. According to Goleman (1995), EI is made up of four unique skills that contribute to how people recognize and understand their own and others’ emotions, manage their behavior, and manage interactions with others. I found emotional intelligence to be integral to my developmental approach as a leader in residence at PDK. The four skills that comprise EI include:

1. Self-awareness
2. Self-management
3. Social awareness
4. Relationship management

The four key skills essential to EI capture everything other than Intelligence quotient (IQ) (Bradberry & Greaves, 2003). O’Boyle and Humphrey (2011) found a correlation between EI and job performance over and above cognitive intelligence (p. 806). Daniel Goleman (1998) posits the most effective leaders are very similar. He makes the claim that
the leaders share a high degree of emotional intelligence. Although he does not intend to
discredit IQ and technical skills as irrelevant, Goleman qualifies the critical importance of
emotional intelligence in leadership development. Additionally, based on a meta-analysis,
leaders with high levels of EI positively relate to the job satisfaction of their subordinates
(Miao, Humphrey, & Qian, 2016). Goleman’s research, along with other recent studies,
clearly indicates emotional intelligence emerging as a key attribute for great leaders. The
research on EI led to the critical examination of my own leadership throughout the
capstone.

Change management, adult development, DDO, and EI were key contributors to
the learning for PDK International. Nevertheless, the theories alone did not satisfy the level
of complexity inherent in leading PDK on a pathway to business and people development.
Therefore, I needed to examine more research based on their current realities and emerging
needs.

DEVELOPING THE C-SUITE TEAM

My final area of research was to explore the literature on senior executive team
development. The research confirmed that senior executives and their teams yield the most
overt control and influence in any organization by nature of their position and roles.
Therefore, they have the greatest capacity to impact the organization and other external
stakeholders.

Heroic leadership is not enough

Many people make the assumption that bringing in a new “heroic” CEO is enough for
sustainable change and great outcomes to reach better goals in business and people
development. However, Wageman et al. (2008) states, “The days of the ‘heroic CEO’ who
sweeps in, steps up, and single-handedly leads the organization to greatness are over. CEOs are increasingly relying on teams of proven and effective leaders to consult, coordinate, and make decisions in a volatile, constantly changing marketplace” (p. 5). Given this perspective, the research further suggests that a senior executive team must be collegial, supportive, and circumspect regarding internal team learning and growth. Herb, Leslie, & Price (2001) go further by highlighting the importance of senior executive team leadership by stating that:

merely bringing in a new CEO to reshape an organization will tend to show mixed results; in the consumer goods companies analyzed in Exhibit 1, for example, they were always worse after the arrival of a new CEO. In reality, long-term success depends on the whole leadership team, for it has a broader and deeper reach into the organization than the CEO does, and its performance has a multiplier effect: a poorly performing team breeds competing agendas and turf politics; a high-performing one, organizational coherence and focus (p. 1).

Figure 4: Heroic leadership is not enough

Moreover, leading researcher, David Day (2000) summarizes the contrast between leader and leadership development in the following ways:

Moreover, leading researcher, David Day (2000) summarizes the contrast between leader and leadership development in the following ways:
Leader development focuses on the training and capacity building of the leaders’ knowledge, skill sets, and personal mastery. Thus, the primary focus is on developing individual leader growth. Additionally, this approach to building leader identity is to enhance the intrapersonal aspect of the leader, which will in turn increase the human capital and talent of leaders organizing and managing other people.

Leadership development; conversely, aims to enhance the interdependent nature of organizational functioning. Hence, the goal is on developing the leaders’ capacity to build social capital within the organization. So, this form of development allows leader to focus more closely on the triangular effect of leader, subordinate, and organizational goals. (p. 584)

To illustrate the dominant view on leadership, many research studies have made the CEO the primary unit of analysis. However, I conclude based on the volatile, uncertain, complex, and ambiguous world the lone, heroic leader is not sufficient to tackle this new era of organizational functioning alone. Therefore, the next section will focus on leadership teams and collective leadership. Further, Wageman’s et al. (2008) demonstrated that there are three enabling conditions and three essential conditions to create an effective senior leadership team. Despite most senior executive teams knowing Wageman’s research, it has escaped many senior leadership teams to develop and implement the necessary conditions needed to cultivate a high performing team.

**The need for high-performing leadership teams**

Given a strategic project to help PDK’s C-suite team develop into a better version of themselves, I examined Hawkins’s (2017) work on high performing leadership teams. Hawkins explores the need for leadership teams to implement the five disciplines to be successful and establish sustainable outcomes. In this section, I outline the opportunity for C-suite to transform their leadership strategy to a radically new type of collective leadership approach. The five disciplines of high performing team development intersect
with my theory of action and the third phase of my strategic project. “We are facing a world where all of these challenges and many more are happening in a systemically complex web of interconnecting forces, at an exponentially accelerating rate so that no expert can possibly understand the whole pattern, let alone know how to address it” (Hawkins, 2017, p.14). C-suite is trying to respond to the needs of various stakeholder in the education sector and should consider adopting a leadership approach that leads to an increased focus on collaboration and shared power. Hawkins (2017) posits “it is no surprise that the average time most CEOs stay in post is becoming shorter and shorter” (p. 16). The increasing demands placed on CEOs is seemingly unrealistic, so how can a radical approach to sharing power in a leadership team enhance outcomes? The challenge is to address the connectivity between tasks and functions of senior executive leadership teams, quite often tasks and roles are delegated to different chiefs and thus create institutionalized organizational conflict and fail to provide the critical integrated leadership needed to radically change processes, systems, and practices to share power (p.21). So, I want to help C-suite consider how they are operating in a traditional sense. And that they may be recreating the very institutionalized approach they are hoping to disrupt in the education sector?

In his three decades of research focused on senior executive team development, Hawkins (2017) has investigated the impact of high-performing leadership teams on organizational success. In his latest edition of *Leadership Team Coaching*, Hawkins (2017) defined collective transformational leadership as more than the sum of its parts. He suggests that the total contribution of members on a team leading for collective impact must make substantial improvements to and within the wider system rather than just to inter-team relationships and tasks (p. 75). He found that organizations are most effective
when the teams responsible for their achievement operate to the best of their ability (p. 32). Many of the challenges that organizations encounter is based on a lack of collaboration and coherence within the teams at the senior executive level.

**Elements to develop a high-performing leadership team**

Hawkins (2017) outlines the five disciplines for ensuring the success of a leadership team. “We need to recognize that both the unit of survival and the unit of success and flourishing is not the team, but the team in relationship to and in dynamic co-evolution with, their environment or ecological niche that constitute their shared systemic context” (Hawkins, 2017, p.183). Based on my prior experience as a human capital consultant in a mental health agency, I realize my approach to support the leadership team was solely focused on creating harmony in the team. Hawkins (2017) introduces these practices based on more than thirty years of research with organizations across the world. First, *commissioning* indicates an understanding that the senior leadership team is clear about what their stakeholders need from them. A distinguishing feature outlined in this component is that the commission comes from multiple source. “We need to start from our core purpose and be clear who the enterprise exists to serve, and what value creation they need or should look for as we go into the future” (Hawkins, 2017, p. 191). For instance, effective leadership teams understand what their board, staff, customers, and the customers’ customer expect from them. Second, *clarifying* involves a high-performing team defining a collective endeavor that needs all its members in order to accomplish the task. Hawkins (2017) define a learning team as “group of people with a common purpose who take responsibility for developing each other, themselves, their team and the wider organization in which they operate, through both action learning and unlearning” (p. 117).
For example, the C-suite team at PDK had several goals to choose from, and it was my charge to get them to identify a goal that needed each member of the team to achieve the project. Third, *co-creating* provokes the senior leadership team to work in a way that allows them to generate innovative ideas. “Unless you disrupt your own past success and your own thinking, faster than anything tomorrow’s exponential start-up will disrupt you more painfully from outside” (Hawkins, 2017, p.207). The type of meetings indicated in this discipline affords a senior leadership team an opportunity to offer fresh, innovate ways of doing an initiative. Fourth, *connecting* describes senior team actions when they are not together. In other words, a senior leadership team’s coherence is based on their alignment when they are not together but they are meeting with other stakeholders. Lastly, *core learning* explores the knowledge management system and ways of building a process for collective capacity amongst the team and reports. “To help organizations and their leadership teams lead in a time of exponential change and constant disruption requires innovative and adaptive strategies and strategizing” (Hawkins, 2017, p. 187). As a school leader, I was often charged with developing professional learning communities for specific target goals. However, the target goals were often given using a top down leadership approach. According to Hawkins (2017) increasingly chief executives as well as other leaders of senior executive teams are realizing the need to establish a high-performing team with much greater shared power across the group. In this scenario, all members of the team take joint responsibility and engage in shared accountability for the collective, integrated performance of the leadership team. (p. 234)
Research Conclusions

After reviewing the literature, I realized that Kegan et al., Deliberately Developmental Organizations (DDO) framework, Kegan and Lahey’s Immunity to Change, and Hawkin’s senior executive team development were most essential for informing my work with the C-suite team. Although the other research highlighted in the RKA yielded useful information, these three theoretical frameworks provided a more strategic approach to sustainable change. There were several reasons I believe these three frameworks were most useful for my work with C-suite. First, the DDO framework provided a theoretical basis and critical practices for self-improvement, which allowed C-suite the opportunity to frame their own collective journey and implement the developmental work needed to be successful. Second, the Immunity to Change framework provided me an opportunity to take C-suite through a self-improvement journey. Moreover, this method afforded me an opportunity to identify my role as a facilitator and someone in the work with C-suite. Third, Hawkin’s five disciplines helped me focus C-suite on examining explicit practices that many high-performing leadership teams implement for effectiveness. Further, Hawkins research centered on collective leadership. This approach resonated with the need for C-suite to consider a radically different strategy for leading at PDK. Perhaps, what led me to this challenging and very complex strategic project at PDK was a desire to practice pushing my own personal leadership development to my growth edge and to complete residency having led senior executives through a process to hold their external work in the presence of C-suite’s internal social interactions that implicate the way they act and react toward each other. Because I wanted to explore senior executive team as the unit of analysis the groove principle in the DDO provided the immunity to change
approach as process to help C-suite teams model the culture they espouse to create throughout an organization.

Knowing that there was a lack of rigorous research on senior executive team development, I wanted to focus my work on the exemplar practices and mindset shifts of successful senior leadership teams that I found in the literature. The senior executive team is arguably the most important group in any organization. And yet the senior executive team is often poorly resourced to accomplish its tasks. Therefore, my strategic project not only involved theory regarding senior executive team development but also taking C-suite through a process, which allowed them to develop a shared purpose and identify a collective improvement goal.

THEORY OF ACTION

From a significant breadth of literature, the most salient of which are detailed in the RKA above, and my leadership experiences, I arrived at the following theory of action:

If I…

- Model vulnerability to develop trust with PDK staff,
- Help the C-suite develop a shared purpose
- Lead the C-suite through a team immunity to change map
- Implement team and peer coaching using the immunity to change approach

Then C-suite will…

- Increase internal team coherence and be better positioned to implement a collective leadership approach

and,
• Be better positioned to implement a collaborative learning approach for organizational transformation

Which will help…

• C-suite establish and live its core identity to support a work environment at PDK international that is more conducive to both business and people development
Description, Evidence to date, and Analysis of the Strategic Project

“We can't solve problems by using the same kind of thinking we used when we created them.” ~Albert Einstein

In this section of the capstone, I will describe my strategic project in three phases defined by key learnings and activities. When my supervisor and I finally decided on a meaningful strategic project, I was excited to be working directly with C-suite. Coincidentally, it started because Dr. Gislaine Ngounou, my supervisor, told me to read the concepts of DDOs by Kegan et al., *An Everyone Culture: Becoming a Deliberately Developmental Organization*. So, I reviewed the framework and was immediately drawn to what Kegan et al., suggested would lead to enhanced business and people development for organizations. In fact, I read the entire book over a weekend and came into the office that Monday morning and proudly proclaimed that I was a *DDOite*. PDK’s C-suite had limited bandwidth to develop and implement an intentional plan to grow as a senior executive team. The work they were facing over the last two years necessitated immediate action focused on financials and diversifying revenue streams. “We really haven’t had time to be strategic about C-suite and developing ourselves both individually and as a core team; we were facing financial hemorrhaging that could have left PDK insoluble” said Albert Chen (personal communication, December 13, 2017). Consequently, it was urgent for me to begin to focus on supporting C-suite to establish their core identity by developing a shared purpose and building a collective leadership approach by using the immunity to change approach. I found that the foundation of my work would be helping C-suite with internal team coherence and external stakeholder impact. Additionally, my work would naturally intersect their present collective leadership capabilities, which I incorporated into the planning of formal intervention sessions. The interventions and processes presented
should provide a pathway for a clear collective leadership approach that C-suite could adopt. It should also ensure C-suite assess their espoused theory of collaboration with the need to radically transforming themselves as they seek to transform the education sector. Most of the inequities in society are perpetuated in institutions and organizations who espouse to eliminate the structures that disempower people, however, many times they are accomplices to creating the same structures that they profess should be dismantled. And yet the policies and practices in most well intentioned education sector organizations create a caste culture.

The table below summarizes the three phases of my work:

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<tr>
<th>Phases</th>
<th>Description</th>
<th>Time Period</th>
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<tr>
<td>Phase I</td>
<td>Engagement</td>
<td>July to September</td>
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<td></td>
<td>Using entry to model vulnerability and openness to allow staff to get to know who I am both personally and professionally. This phase will help me build authentic trust, and help me uncover the adaptive challenges facing PDK while both probing staff and researching literature to identify a granular focus for my strategic project.</td>
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<td>Phase II</td>
<td>Assessment &amp; Insight</td>
<td>August to December</td>
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<td></td>
<td>Conducting formal and informal assessments while cultivating insight into areas for improvement. Creating a sense of cognitive dissonance with C-suite to be a catalyst for strategic interventions.</td>
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<tr>
<td>Phase III</td>
<td>Reorientation</td>
<td>January to March</td>
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<td></td>
<td>Honoring the community and holding the complexities of adaptive challenge while helping C-suite develop a shared purpose and engage them in an internal team improvement goal process using the Immunity to Change (ITC) approach to reorient C-suite to a radical collective leadership approach.</td>
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</table>
Nonetheless, before proceeding, I would like to share my personal learning journey and roles. First, my assigned role was to support the education partnerships division at PDK International. I initially worked on strategy for education partnerships and building the structures for PDK’s new venture for system leaders called the Community of Learning and Practice, a project funded by the W.K. Kellogg Foundation (WKKF). In addition, my conceptual role was to add value to PDK across divisions to get a better understanding of C-suite’s executive function and to provide impact for the entire organization. I envisioned myself advancing the work of business and people development and supporting the realization of C-suite’s espoused theories. Moreover, it was my goal to complete a thorough assessment of the needs of the entire organization by starting with C-suite as the lever for organizational effectiveness. My actual role was filled with both the technical aspects of education partnerships and the adaptive aspects of PDK’s organizational identity, culture and development. Consequently, I was able to connect with and support most staff members in meaningful ways that fundamentally changed my thinking around the implications for my residency journey and strategic project at PDK.

Although I co-designed and co-facilitated learning sessions focused on social justice literacy with the PDK Board and then later with PDK staff, I found a more pressing issue at the root of PDK’s organizational stillness. C-suite was at the crux of the matter. Knowing that most residency projects are about leading an initiative for senior leadership, I was perplexed at how to propose that the unit of analysis would be the C-suite team. However, when I pitched the project to my supervisor, she was cautiously optimistic at how it would land with the rest of C-Suite. “I know that you are correct in your assessment of C-suite, but you know identity threat is ever present when accomplished leaders are
asked to take a look in the mirror in regard to their leadership,” said Dr. Gislaine Ngounou (personal communication October 19, 2017). Nevertheless, Dr. Ngounou helped me to develop a timeline and build the sense of urgency with C-suite to realize the value in my strategic project. So, without her support and knowledge around this topic, my strategic project would have been very risky and probably would have not been received very well. And this led me to my first phase: Engagement.

PHASE I

**Personal Description I: Engagement to residency/strategic project**

While writing my entry plan for PDK, I decided to take a deep engagement approach to my first 60 days of entry. Typically, when I entered a new space of work, I gathered as much information about the people, systems, and practices. Next, I proceeded with my meaning making system to determine how to best function within the organization. Hence, I spent a huge amount of time managing people’s impression of me, and hiding my identity both personally and professionally.

In my second week at PDK, I scheduled two lunch meetings that began my journey of telling my personal narrative based on the interest of my new colleagues. I found it very interesting that most people wanted to hear my story of self from childhood to present, and they wanted me to share where I saw myself in the future. This was a fascinating storytelling journey for me. I had never shared my past, present and future self-narrative prior to my time at PDK. Nonetheless, I felt residency was a perfect time for me to practice being vulnerably by using the art of personal storytelling. Based on the literature from the RKA pertaining to emotional intelligence, I created familiar themes with my story of self with staff. Most PDK staff members wanted to hear stories about my K-12 school
experience, early experiences as a teacher, and what I thought my professional trajectory would be after residency. Two components of emotional intelligence really resonated with me during the engagement phase. First, I needed to be self-aware to share my authentic story about my past, present and future. For instance, I discussed my struggles with developing a culture of togetherness as a school leader because I did not value the potential impact of cultivating relationships in the workplace for optimal performance from staff. Second, the research on social awareness in leadership highlighted the importance of engaging others in my role as a leader and person. I conducted one on one meetings with all staff members at PDK and gave them the opportunity to ask me any questions they were curious about residency and my life. I wanted our meeting time to be used to make them feel more comfortable about me.

While my overarching goal for my one-on-one meetings and interviews was to gather as much information about the people, systems and practices that guide PDK’s DNA, I found myself slowing down the pace of information gathering from others. I started with vulnerability through story and allowed others to better understand me. I did not want staff to feel like I was there to only get information from them. I wanted them to know that I viewed them as human beings first and that the collection of data was secondary to my learning about their insight on PDK and the strategic project. Coincidently, entry went very well, and I was able to engage with everyone at the office and was able to build relational trust and get meaningful evidence to date, which allowed me to be more productive and thoughtful in Phase II.
Organizational Description I: Help C-suite develop a shared purpose: **Moderate Progress**

In the beginning of stage three I was struck by my individual sessions with the members of the C-suite team. They were all very explicit that they needed to develop a shared purpose. During my first session with C-suite, we were beginning our journey to capture ideas around a shared purpose. In my one on one meetings prior to our first team session, I asked each member of c-suite to tell me their ideal purpose for C-suite. I believe this move allowed our first team session around developing a shared purpose go a lot faster because they had already articulated it to me and now my goal was to allow them to share it with one another. So, during our team session all three participants had an opportunity to share their ideal purpose for C-suite and some progress was made to capture and codify the best thinking around a shared purpose. In stage three, after our first team session I had more individual sessions about the differences and similarities regarding the purpose of C-suite and what they wanted to be for each other as well as for their stakeholders. The work that I engaged in was challenging; however, I believed it was necessary before we begun the work of creating a developmental team improvement goal. While people may think that it should be relatively easy to come up with a shared purpose with highly talented proven senior leaders, it is just the opposite. At this point we will be conducting our second session to determine a more collaborative approach to capturing their shared purpose.

**PHASE II**

**Personal Description II: My assessment and insight strategy**

The second phase of my strategic project enabled me to better clarify what I wanted to focus on during the remainder of my residency at PDK. At the very end of November while organizing all of my anecdotal notes, survey data and experiences, I pivoted and
began a new course of action. A course of action determined by the needs of the people at the core of PDK’s organizational reset. Albert Chen noted, “we need to identify what type of C-suite team we want to be. It is not good enough to just put ourselves on top of the organizational chart.” Dr. Ngounou’s hope was to lead the purpose setting and the internal work culture of C-suite and the organization. However, there was just not enough hours in the day for her to perform those duties. Leading phase II of the project involved digging a little deeper into what was on the minds of staff and the C-suite team. I created two surveys (see Appendix C for survey) to get a more robust idea of the interventions needed for C-suite. The challenge for me was to Dr. Ngounou’s earlier point. She restated for me, “how can you mitigate the identity threat of accomplished leaders looking at themselves as the problem to be solved?” This was not an easy question to answer, neither was it a task for the faint of heart. After reviewing the survey data, I decided to not release to C-Suite for two reasons. For one, I believed an assessment is only impactful if people are ready to hear what the data say. Second, I wanted C-suite to name the assessment results themselves and make predictions about what the data implied. I did this through my questions during formal and informal intervention sessions. For example, Dr. Joshua Starr, indicated “I think the C-suite team needs to be more coherent and strategic to lead more effectively.” His quote directly spoke to the data point about the lack of coherence amongst C-suite as an internal team. (personal communication, January 16, 2018).

Based on my collected evidence, I assumed I had what I needed to implement initial interventions, but it seemed like I was adding to the complexity and making it bigger than it needed to be. For instance, I wanted to design a guidebook before implementing an intervention instead of organically designing more interventions after each session with C-
suite. However, I quickly reversed course and started to think about ways to engage in the work as a means of learning about the root causes and challenges C-suite was facing. Additionally, this led me to reflect more deeply on two more components of emotional intelligence. I found that self-management and grappling with my own triggers was difficult at times. As one might expect when managing up in an organization with leaders who are very smart and thoughtful, I expected this to be somewhat challenging for me. For instance, I heard a lot of reactive practices to manage areas of growth for C-suite members, but I did not find evidence of a process to improve on the weakness as I had proposed. Also, relationship management, was a big indicator of my success with working with C-suite. I had the opportunity to develop a deeper sense of comraderies with C-suite. I knew that managing those relationships with each member of C-suite was critically important to the change I sought to make with them.

In phase two I firmly decided with Dr. Ngounou that C-suite was my unit of change. While the granularity of the change was to provide C-suite a process to develop a shared purpose and engage in a developmental team coaching process, I needed to help them build their collective leadership capacity. Additionally, I wanted C-suite to model being the change they wanted to see in the organization. At the same time, I needed to reflect on my assumptions and personal leadership challenges. In my estimation C-suite needed to focus on themselves in the context of the work both internally and externally. The strategic project began with me facilitating a shared purpose protocol and providing them a reading on the immunity to change process. I wanted each C-suite member to go through their own transformational change and to come to work every day focused on improving themselves based on their collective team improvement goal, so that as a team and individuals they
would better embody the developmental journey of becoming better versions of themselves. In hopes that they would embrace this journey with the people they lead, so staff would also have the opportunity and space to develop into better versions of themselves each day.

**Organizational Description II: Help C-suite define a collective team goal: Progress**

The key indicator for this outcome was my ability to find the granularity in defining my strategic project direction. The evidence for this claim was explained by my theory of action that has advanced to identify a level of specificity to work with C-suite on identifying a big improvement team goal and using the ITC approach as a pathway to bring increased coherence and collaboration amongst C-suite.

**Introduction to Immunity to Change Map:**

My gradual understanding of the granularity of my strategic project was made clear in this stage, and I had a better sense of why some things were happening slower than others. For example, as part of my strategic project, I wanted to enact new practices at PDK for staff. Nonetheless, I was able to recognize that C-suite needed to embrace and embody the changes first for my work to be sustainable. Further, my new mindset led to my laser focus on moving the work through C-suite by taking them through the process of collaboration and collective leadership. Essentially, it was about me taking C-suite through a team development process using Kegan and Lahey’s (2009) ITC approach along with Hawkins (2017) systemic coaching moves (see Appendix D for the ITC approach).

First, C-suite was provided a reading on the ITC approach starting with each member identifying a big improvement goal. As I began the collective goal process with C-suite, I introduced the workbook for the ITC approach and took them through the
experience of a team change journey. We started the intervention with C-suite discussing things that they were struggling to implement both internally and externally. Next, C-suite chose one of the challenges and turned it into an improvement statement. From there the focus was on completing the next three columns which highlight how individuals or teams protect themselves and actually do the very actions that keep them from meeting their improvement goal. And the ITC map allowed the C-suite team an opportunity to see how they systematically prevent the very progress they hope to accomplish

**PHASE III**

**Personal Description III: My reorientation strategy**

The third phase of my strategic project afforded me the opportunity to get a better understanding of the essential components necessary for the reorientation strategy with C-suite for both individual and team based interventions. In stage two, I initially focused on designing a plan instead of facilitating interventions and learning while being in the process with C-suite. However, in stage three, I decided to get on the balcony and see the dance floor at PDK in a much different way (Heifetz and Linsky, 2002). In *Leadership on the Line* Heifetz and Linsky (2002) suggest getting on the balcony by stopping the action and taking a thousand-foot view of the context to identify the most effective next steps; its counterpart get on the dance floor involves the process of going back to the action. Being on the balcony reminded me of the importance of Deborah Jewell-Sherman’s, Gregory R. Anrig professor of practice in educational leadership, wise words: “We need to be mindful that we respect the mountain that senior leaders are on.” I realized it may be easy to see all the challenges in the individual leaders and C-suite as a team, but I did not have a full understanding of the mountain. “What assumptions must you be making in order to come
up with some of your conclusions,” Dr. Ngounou said (personal communication January 24, 2018). I began to more fully come to grips with the assumptions I was making because I failed to get on the balcony and the dance floor and embrace the complexity that was unearthed in the adaptive work.

One key event in stage three was that the members of C-suite shared things with each other that they had never heard before. I am hoping that this move will be a catalyst to build more meaningful relational trust and they move through the continuum of team coaching that they will remember to see each other as human first in all their complexities, preferences, and needs.

**Organizational Description III: Design and facilitate a series of monthly coaching session that introduce the ITC approach to team development:** **Slight Progress**

The coaching provided the necessary components for C-suite to engage in a developmental improvement goal process focused on collective leadership by centering the coaching on the work needed for C-suite to be more effective both internally with one another and externally with their stakeholders. At this time, this is an ongoing component of my work, and I may need to increase the amount of intervention to twice a month. My goal is to design two sessions for each month. However, I will be developing the session content only after the prior session. This gives me an opportunity to organically create the next steps based on what I heard and saw through the previous session.

**Organizational Description IV: Create scenario planning and capacity of C-suite to develop pathways for increased collaboration in the organization** **Not started**

I was unable to reach my expectations for the fourth outcome. I believe I should have pushed much harder for meeting time with C-suite. At the time of my residency, C-suite did not have a regular meeting time scheduled monthly or bi-weekly. However, at the
end of my residency, all members of C-suite discussed the importance of having a regularly scheduled meeting day and time. It is my hope that my work was a catalyst for them to make this assessment based on the evidence presented to the team.

**EVIDENCE**

The table below summarizes the organizational assessment of success for my strategic project:

<table>
<thead>
<tr>
<th>Phases</th>
<th>If I…</th>
<th>Evidence-to-Date</th>
<th>Supporting artifacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engagement</td>
<td>Model vulnerability to develop trust with PDK staff and C-suite</td>
<td>• 14 out of 14 staff shared their personal story with me  &lt;br&gt; • 12 out of 14 staff asked to speak to me about things they wanted to keep off the record</td>
<td>Journal writings  &lt;br&gt; Confidential</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td>Help C-suite develop a shared purpose</td>
<td>• C-suite wrote their individual thoughts on shared purpose and combined similar thoughts on one chart paper.</td>
<td>Completed shared purpose statement</td>
</tr>
<tr>
<td>&amp; Insight</td>
<td></td>
<td>• C-suite has developed an immunity to change map leading to a collective improvement goal</td>
<td>Completed ITC map</td>
</tr>
<tr>
<td></td>
<td>Lead C-suite through a team immunity to change map</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reorientation</td>
<td>Implement ITC team and peer coaching using the immunity to change approach</td>
<td>Recommendations for next steps:</td>
<td>Electronic calendar with suggested bi-weekly times and dates for C-suite meetings</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Calendarize C-suite team meetings (Bi-weekly)</td>
<td>Suggested partner pairs for peer coaching</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Paired C-suite team members for monthly coaching session (Bi-weekly)</td>
<td></td>
</tr>
</tbody>
</table>

**ORGANIZATIONAL EVIDENCE TO DATE:**

The aim of my strategic project was to help C-suite develop a shared purpose and engage in a team improvement goal approach in order to begin the process of strategy and implementation of a collaborative learning organization. In this section, I evaluate the effectiveness of actions I took to engage C-suite and how well I achieved my set goals. I outline this section based on the “if” portion of my theory of action and the hypothesized results of the “then” portion of my theory of action. Further, the evidence I use to determine my outcomes fall into four categories:

**Evidence of progress: Model vulnerability to develop trust with PDK staff and C-suite**

**One on one interview sessions:** During my first one on one meeting with staff members, I decided to model vulnerability by sharing my story of self. Based on the feedback I received, staff appreciated the opportunity to get to know me first before I started to collect information from them. Consequently, when I met with staff members for one on one interviews a second time, I had 14 out of 14 staff members share their personal stories with me. I believe that was a powerful foundation to build trust and meaningful relationships with staff. Further, I believe our first meeting set the stage. I also allowed staff the opportunity to ask me any question they wanted to know about me, so it was wonderful to see that my vulnerability became a reciprocal process with PDK staff. Second,
I was asked to engage in off the record conversations with 12 out of 14 staff members. During these conversations staff really shared what they were thinking, which allowed for more trust to be built. I began to schedule regular times to talk with staff members who wanted to talk about their thoughts and solutions to the work at PDK. The one criteria I had was that it had to be positive and not hurtful regarding other people. This really helped me diagnose the current situation at PDK and provided me crucial data for defining my strategic project.

**Evidence of progress: Help C-suite develop a shared purpose**

When I designed and facilitated our first intervention session in January, I had hoped to not only help them create a shared purpose, but I wanted to ignite a sense of urgency for C-suite to begin to schedule monthly or Bi-weekly meetings. The intervention sparked conversation and the need for C-suite to calendarize their meetings more regularly. And the feedback from the meeting, was they wanted more time to work on themselves as a team and develop a shared purpose and improve coherence. Although my intervention session did not specifically mention regular meetings, it did create the appetite for regular meetings. My more complete understanding of C-suite influenced how I designed future intervention sessions. I decided that I would begin to incorporate informal interventions as a strategy to inject my influence on change in a less formal way. I would ask questions and interject wonderings in many conversations throughout the day around leadership development, change, and senior executive team development. This strategy really informed my research and was crucial to my formal intervention sessions. Another key indicator was that I was able to articulate my strategic project with others with much more
clarity than in the first four months. In addition, it widened my engagement strategy, which encompassed my residency and was the crux of generating change with C-suite.

Evidence of progress: Lead C-suite through a team immunity to change map

The subsequent interventions sessions focused on the ITC approach. C-suite went through the process and completed an ITC map. A key indicator of success was the C-suite team going through the ITC process and completing a map. At the time, I thought it was just about having them complete the map to fulfill an objective for my strategic project, but I found the 90-minute session to be powerful. C-suite engaged in a session that has the potential for organizational impact, and I believe it set the stage for an incredible journey of self-improvement and collective leadership. The formal intervention session afforded the opportunity to guide C-suite in a developmental process and to manage up in a new organization by coordinating a process to align organizational culture and C-suite development. I began to plan for regular monthly meetings with C-suite and outlined a set of recommendations for them to continue to engage in the self-improvement journey and collective leadership approach.

Evidence of progress: Implement ITC team and peer coaching using the immunity to change approach

I do not have a key indicator for this phase of the work. I was unable to fully implement my strategy for a continuous process of ITC coaching and peer coaching. One of my reflections is that I failed to initiate formal interventions on a regular basis to gather evidence for this phase of the work.
PERSONAL DEVELOPMENT - The table below summarizes the personal assessment of success for my strategic project:

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Not started</th>
<th>Slight Progress</th>
<th>Progress</th>
<th>Moderate Progress</th>
<th>Significant Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome 1:</strong> My engagement to build trust and cultivate relationships</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Outcome 2:</strong> My assessment and insight strategy in order to create a sense of cognitive dissonance</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Outcome 3:</strong> My reorientation strategy in order to establish an ITC approach to improvement</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Evidence of progress:** My engagement to build trust and cultivate relationships

This strategy permeated throughout my residency and became the foundation and the key to influencing mindset shifts through informal dialogue and exchange of ideas.

The key indicators for progress in my personal engagement phase were outcomes that demonstrated my ability to deepen my relationships in order to gather pertinent information to better understand the next steps for an impactful change project at PDK International.

By the end of the first phase I had two outcomes that indicated development towards a
meaningful strategic project: 1) a diagnosis of the most pressing challenge, and 2) the completion of a strategic project timeline.

**Evidence of progress:** My assessment and insight strategy to create cognitive dissonance

A key indicator for success for me was my ability to stay in conversation when others were sharing a perspective that I did not agree with. By being fully present in those conversations I was able to gather assessment data needed to further my planning for formal and informal interventions. In addition, this helped me map out a strategic set of questions that would create cognitive dissonance with C-suite and the impact of their espoused theories with the theories in action.

**Evidence of progress:** My reorientation strategy to establish an ITC approach to improvement

A key indicator of success for me was my ability to keep pushing forward with the work of ITC and refining it based on my engagement, assessment, and insight into the members of C-suite. Nevertheless, I should have stretched more here to see how the reorientation would affect my leadership and facilitation of C-suite.

**DIAGNOSING THE CHALLENGE:**

Upon entry, I believed that my strategic project was going to entail helping PDK build the social justice literacy of all members of PDK International. I now know that I was operating under the assumption that this is what the organization needed in order to be radically transformed. In reflection, I wondered if my pivot should have begun earlier in the residency. I pondered that question up until my last day at PDK. What did I miss in September and October that could have facilitated this pivot sooner? I continued to believe that building PDK staff members’ social justice literacy was extremely important, I also
knew that staff and C-suite needed a foundation to transform their way of being for each other and the organization. It was evident to me that the foundation needed to start this transformation was helping C-suite tackle this complex transformation of PDK with a collective leadership approach. Although, independently C-suite was superb at their specific roles they needed to become a high-performing C-suite team. I started the journey by helping them develop a shared purpose for their internal team while considering the needs of their external stakeholders and engaging in a developmental coaching process of identifying a collective internal team goal that also impacted external stakeholders by using the Immunity to Change approach.

The essential question of my strategic project was how do I help C-suite develop a shared purpose, model collaboration, and collective leadership to improve coherence. It is not yet determined whether the outcomes to date from my strategic project had any impact. However, the actions I took to develop C-suite’s shared purpose and collaboration improved their understanding of collective leadership and coherence. In this section, I examined the concepts from the deliberately developmental framework to guide my analysis, make sense of what happened, and uncover the root causes of my evidence to date. Further, I focused on assisting C-suite with integrating some DDO practices within our team coaching sessions to build their awareness and to practice a culture of collaboration and collective impact.

Therefore, I begin with myself as a unit of analysis and then analyze the organization.

ANALYSIS

SELF-ANALYSIS

Edge: The height of its developmental practices (A self-analysis)
During my residency year, I initially struggled with the concept of edge. As a former school principal in a turnaround environment, I would often lead with little patience for developing people. And I could sense this same feeling coming back to me as PDK was looking to its people to be great followers during this transition and reset phase. So, I would say that I didn’t have much empathy during phase one of my engagement interviews for people that didn’t seem to be on the bus. However, I didn’t take into consideration based on Bridges (2009) research on managing transitions was the fact that PDK staff needed space for healing and getting through their loss. Further, I can recall that I journaled, if I were CEO, I would have just fired the people who displayed incorrigible behavior (Johnson, 2017, personal journal). And I am still not sure the best response to managing the transition PDK was going through, but I certainly have a lot more tools to help people through the change management process.

**Groove: The breadth of its developmental practices** (A self analysis)

With the deliberately developmental framework, I began to better recognize that leadership is about setting people up to be successful and helping people overcome their own impediments to change. As I was reading the literature on mind the gaps, I realized how most people are avoiding their weaknesses to keep themselves safe. It is almost like they have a mask of protection and they are hiding their true selves. I found this to be quite fascinating. As people were hiding who they truly were at PDK and concealing their developmental needs, they were actually missing opportunities for growth. I thought about my own leadership and my ability to help people along the developmental process by creating the very structures that call them out as imposters. Nevertheless, I really enjoyed thinking through the best approach to advance the self-improvement journey with C-suite.
One of the tools, I was most excited to use was the Immunity to Change map. I was able to take C-suite through the first phase of the self-improvement journey using the Immunity to Change method. My aim was to introduce them to the process by taking them through a session and engage them in a collective improvement goal process that could prove to be useful for the entire organization. I believe the fact that I continued to build the influence needed to lead this work by modeling vulnerability and developing relational trust allowed me to push them to go through this internal team process focused on C-suite as the unit of change needed to transform PDK.

**Home: Developmental communities to provoke and hold vulnerability** (A self-analysis)

Before my residency began, I knew that I wanted to begin my organizational entry far different than I had ever done before. I saw this as an opportunity to practice being vulnerable as a way to build trust. I was extremely nervous at the beginning of residency because this was completely new territory for me. I had longed espoused to the doctrine that there was only one way to build trust and that was not being vulnerable until you knew someone. And that starting out with vulnerability was a mistake that could lead to people taking advantage of you before ever really knowing who you are. In the last two years, I learned that this was not the case; however, I was in a container of a cohort who were working on similar things. But taking this approach to a new place with people I have never met was rather scary. Nevertheless, I convinced myself that this was a now or never moment, and I had an opportunity to go all in and take a deep dive into my fears of leaning into vulnerability to build trust. Fortunately, my supervisor Dr. Ngounou, an Ed.L.D. alum, had facilitated sessions on what it means to be vulnerable in the workplace, so her guidance
and feedback was very helpful and assuring in that regard. The onboarding process that she created for me laid a great foundation for staff to get to know me as a person before I proceeded to collect any evidence about their roles or thoughts on the organization.

My engagement approach was supported by Marshall Ganz’s work on personal narrative, which invites people to begin to tell their story of self and why, so that people who work with them can better understand who they are and why they are doing the work. Prior to the Ed.L.D. program, I would have never taken this approach to entry or phase 1 of my work. I had been operating under the assumption that in order for me to be vulnerable, then I first must develop trust. And that trust would take a long time and be part of an ongoing piece of work together. I would have never started with vulnerability as a way to build trust and form authentic relationships in my prior leadership roles. However, when I released my fears and assumptions around creating a container for people to trust me, I realized how powerful it was to provoke and hold vulnerability.

PDK proved to be a meaningful working and learning environment for me to begin my transformation. Consequently, I worked on reorienting myself to a new way of being in the world both personally and professionally. Moreover, PDK was the laboratory that allowed me to proceed with new ways of experiencing myself in the workplace in real time. I am grateful to have experienced a work setting that supported my evolution. It was a truly humbling, albeit challenging, experience to be supported by passionate leaders at PDK International. My adult development process has not always gone smoothly. However, the struggle has had implications for my continuous learning and consistent growth as I have sought to reinvent myself to be a part of radically transforming the education sector.

ORGANIZATIONAL ANALYSIS
Edge: The height of its developmental practices (Organizational analysis)

Organizations that are DDOs are considered developmental because the leaders intentionally intersect with their members’ developmental positions (Kegan et al., 2016). So, C-suite had an opportunity to consider the DDO approach as a plausible framework for improving outcomes related to their strategic goals. I was able to help push this work because I was able to build relational trust with C-suite. “I don’t think I would have opened up to this approach if you had not developed relational trust with me and other staff members”, said Albert Chen (personal communication February 11, 2018). This fact implored me to go deeper on my focus of supporting C-suite by helping them capitalize on developmental practices that would help them become aware of their own growth edge. My ability to hold up a mirror to their leadership practices and share my thoughts about how my research intersected was critical to creating the container that adults can grow if they are supported and held accountable in a growth inspired environment. Therefore, the ecosystem reimagined at PDK was one that recognized adult human potential by providing intentional space for practices that promoted everyone becoming better versions of themselves starting with C-suite.

Groove: The breadth of its developmental practices (Organizational analysis)

In the beginning of my residency, I heard a lot of ideas from C-suite regarding their own development. Specifically, they discussed approaches that identified consultants, trainings, and professional development opportunities for leader and leadership team development; however, I cautioned at that time that this approach may not ensure that the workplace would be designed for people to work at optimal levels nor were they intentionally taking a developmental approach for growth for themselves based on their
work environment. It was those conversations along with preparing some assessments for them to begin to see that one pathway to growth was based on establishing a core identity through developing a shared purpose. This formal intervention created a sense of urgency for C-suite to begin the process of internal C-suite team development.

Further, the new structures and practices were beginning to be embodied by C-suite by having them pilot some of the work in a DDO. “DDO work settings are built for human development. They support people in overcoming their limitations as part of contributing to the profitability of the business” (Kegan et al., 2016, p. 13). So, I identified two essential questions to consider for my analysis:

1. How can C-suite model a growth culture?
2. How can trust and vulnerability be cultivated amongst C-suite?

By taking C-suite through the immunity to change map they were able to tangibly see the potential benefits of identifying a collective goal and name some of the obstacles that get in the way of people and teams reaching their intended goals. I believe this also allowed C-suite to see me as a facilitator capable of making them think differently.

**Home: Developmental communities to provoke and hold vulnerability** (Organizational analysis)

Although I was able to determine the distrust of C-suite was high in the beginning of my residency, I was unable to determine if this was a result of opposing views of two influential leaders in the Educators Rising division who had really strong beliefs in their mission for Educators Rising that were not in alignment with Dr. Starr’s vision. When, I think about PDK provoking and holding vulnerability, it would mean a very different approach than what I saw in the beginning of my residency. At the core of change
management is developing a human centered approach of staff to think, feel, and act with a new sense of direction and purpose.

Coincidently, my role as a strategic resident at PDK had shifted to focus on balancing the high stakes economic growth to a supportive environment centered on adult development, happiness, and interdependency. Further, I believe in order for C-suite to change the paradigm of what a normal process for resetting organizational identity and culture is as it related to what success looks like, they must begin with themselves in understanding their own limitations.

Although this might not be the only pathway for organizational development, I am intrigued by the potential this approach has for C-suite. I enjoyed supporting C-suite to fully invest in their own workplace health. As I am reminded every time I board the plane to use the oxygen mask first, I too offer the same suggestion to C-suite, and I hope they accept the invitation to continue to inhale the oxygen first, so they are able to better support their staff to live a new way of being at PDK. The authors of An Everyone Culture Kegan, et. al. (2016) included these proven benefits to a being a Deliberately Developmental Organization:

Increase in profitability, improved employee retention, greater speed to promotability, greater frankness in communication, better error detection in operational and strategic design, more effective delegation, and enhanced accountability

- Reductions in cost structures, political maneuvering, interdepartmental strife, employee downtime, and disengagement

Solutions to seemingly intractable problems, such as: how to convert the familiar team leaders (each looking out for his own franchise) into the more valuable, but elusive, leadership team; how to anticipate crises no one in the company has experienced previously and to successfully manage through them; how to invent and realize future possibilities no one has experienced previously. (p. 1)

**Glimpses into the future**
The driving question of my strategic project concerns how to help the C-suite team at PDK International develop a core identity and build collective leadership capacity. Results from my strategic project indicate that the process I used to highlight the learning of deliberately developmental organizations and high performing senior executive teams was mostly successful in setting the stage and have the potential to help C-suite radically transform its collective leadership approach. In this section, I discuss leading indicators of growth. Although it is too early to provide concrete examples of reorientation to new leadership practices by C-suite there are some actions that illuminate the promise of this work. First, revitalizing educators rising has been a major concern for C-suite. During the last three months of residency, educators rising had a major shift in culture. For example, in the beginning of my residency, educators rising was its own stand-alone division and operated its own culture. Since Dr. Ngounou has taken charge of the division, it has become more integrated into the larger culture of PDK. Second, the interview process has evolved since my time at PDK. Initially, PDK had a tedious second round process of bringing in roughly six people for in person interviews that lasted 90 minutes. There was a request by Albert Chen to conduct virtual interviews for the second round to become more efficient at screening final round candidates. At first the virtual interview option was rejected by Dr. Starr. However, I was given the opportunity to create a virtual interview process to explore its benefits and plausibility. Consequently, the virtual interview process has become a main staple of the interview process and most of the other divisions in PDK are using the virtual interview as part of their process. This was a major shift in thought and practice for C-suite and it is one indicator that collective leadership is necessary for optimal organizational transformation. Third the senior leadership team meetings are comprised of all the division
directors. The senior leadership team meetings I attended were very technical in nature. Further, most of the meeting time was dedicated to providing updates and giving information. Nevertheless, the last two months of my residency, I observed a very different type of senior leadership team meeting. Specifically, in the last meeting I attended as a resident, I heard all members of the senior leadership team discuss the next steps for a successful goal toward meeting their financial targets for the year. At this meeting, everyone was sharing ideas around their expected outcomes. This was a far departure from the business as usual senior leadership team meeting and a hopeful sign of collective leadership penetrating the entire organization. Last, I was hoping my strategic project was a catalyst to set the stage for future C-suite direction toward establishing their core identity and collective leadership approach. Much of the evidence I gathered around this was the statements from C-suite indicating a desire to read more about DDOs and continuing the team immunity to change map work as a way to build collective leadership and establish its core identity.

**Overall Successes and Failures of the Project (September 2017 – March 2018)**

In this section of my capstone, I analyze the successes and failures of the strategic project. I believe that I moderately achieved the shared purpose protocol (Project objective 1). The first objective was a little easier to implement than the others. It was the foundation for our work together, and I found that C-suite really wanted to create a shared purpose for increased coherence and collaboration. And I really enjoyed taking them through the shared purpose protocol and giving the homework after some time to reflect and having gone through another intervention session on external stakeholders. Next, I made progress on the outcome of a
collective improvement goal (project objective 2). Prior to beginning this session, I had a one on one session with Mr. Chen, COO, outlining the components of the ITC approach. Dr. Ngounou and Dr. Starr had already gone through the process, so I was able to take a deeper dive with Mr. Chen. And I think his embracing the immunity to change as a method to consider helped me when I introduced to the C-suite team. One of the biggest challenges was to schedule C-suite for a team meeting. As mentioned earlier and one of my recommendations is for them to calendarize a bi-weekly C-suite meeting. However, a major obstacle was my reluctance to move to action and learn from potential failures with C-suite. I continue to wonder about my hesitance to begin the intervention session earlier than I did. I believe that I did a lot of foundational work in phase one using engagement, but I could have used the intervention sessions as an engagement and perhaps I would have gotten more data. I found that I process internally and typically wait for the right moment to dive into a situation. Nevertheless, I have also missed opportunities based on this approach. I learned more about myself and my propensity to think through next steps to learning slowly rather than acting my way to learning faster. Perhaps, as I reflect on the why, it began with my fear of failure and not wanting to produce something that was not perfect. I know that I have a lot of growth to make in this internal thought process, and I will continue to explore my own shortcomings to be a more effective senior executive. Kegan et al., (2016) discusses knowing the importance of your own internal thoughts because it shows up in the external work that you do. And this was quite a lesson learned from my own self-analysis and will allow me to become a better leader in the future.
IMPLICATIONS

Implications for Self

My new learnings from the Ed.L.D. program have totally transformed the way I think about leadership and living. Further, the program provided me a solid foundation for including myself in the process of thinking, acting, and feeling within an organization. Nonetheless, this was easier said than done. My thoughts, feeling and actions were all challenged during residency. I have spent several years leading schools in crisis and in need of drastic turnaround, and I assumed this would lead me to easily grasp the what, why and how of my strategic project. However, nothing could have been further from the truth. First, I was in a different part of the education ecosystem. This was my first time working and leading in a nonprofit setting. Although many skills from school leadership were transferrable, I found myself in a new arena that held similar challenges, but in a very different context and set of circumstances that schools and school systems don’t necessarily encounter.

Thus, one significant difference was the day to day movement of the work. The work at PDK seemed to move much faster and the products designed and decisions made were
not for the faint of heart. There was no hiding your work because it was front and center and you were expected to perform at high level daily. So, I was very grateful for my learning and time at PDK International, the experience allowed me to situate myself in an unfamiliar space in the education ecosystem, and I believe it made me more thoughtful and reflective in my leadership competency. Additionally, as I think about my challenges in residency, I posed two questions to myself that I will explore in this section.

1. How am I leaning into vulnerability to build trust and meaningful relationships?

2. How am I sitting in complexity to hold other perspectives and truths?

**Leaning into vulnerability**

As a preference, my mode of operating is introversion and I draw energy from being in reflective thought. So, I typically choose not to disclose who I am to others at initial meetings. For the most part, it takes a very long time to build relationships with other people, and I usually would feel them out before I provide any personal information about myself. However, a core part of my entry plan was to intentionally lean into vulnerability by allowing others to get to know me on a personal and professional level. I would typically start the conversation by stating my purpose was for them to get to know me better. And I invited them to ask me any question that they had on their mind. Specifically, I said, “I want you to get to know me on a personal and professional level, so this introductory meeting is about me inviting you to ask me anything that comes to your mind and that you are curious about me regarding my past, present, and even my thoughts on my future self” (personal communication, various dates, 2017). This took many people by surprise because as Dan Brown stated, “This is awesome, I thought you were just going to ask me a bunch of questions. I really appreciate this direction, and if you have anything you want to ask
me as well please feel free to stop me and jump in” (personal communication, October 10, 2017). As I wrote in my phase one evidence to date, I was very pleased with the level of trust that was developed with me and staff at PDK. And I believe I was able to go much deeper with staff in regard to their thoughts, feelings and evidence to what they were experiencing at PDK. The anecdotal notes collected was extremely helpful for me in deciding the direction of my strategic project. And I think if my entry did not focus on this authentic approach to entry, then I would have not gotten as much honest, raw data.

**Planting myself in Uncertainty**

As a former teacher and school leader, I lived for getting ahead of work and knowing next steps quickly. I let any mistake fester and focused heavily on what I did wrong. I would always blame it on poor preparation regardless of the situation. As I mentioned previously being in the nonprofit space was an unfamiliar territory of the education ecosystem that I have never explored or knew about. My supervisor pushed me to think about it differently. We talked a lot about failing fast and how that approach provokes failure for better results and creativity. Although I do not have a bias for unfamiliar action, I have considered the negative impact of prolonged thoughtful planning and deliberation. However, between phase one and phase two, I became somewhat more comfortable with pushing new ideas and projects out for reactions from C-suite and other employees. I was asked to develop a new virtual interview protocol for a program manager position with Education Partnerships. I was excited about this project, and I spent a lot of time detailing the roadmap to a successful 90-minute interview process. Nevertheless, I was initially very hesitant to show what I designed for other people reactions. But one day after work I looked in my journal, and I saw “fail fast to learn faster” It was that moment
when I decided to push it out for staff comment, and it was very helpful for me to get feedback before the very first virtual interview process at PDK. Now, the virtual interview session had become a permanent fixture with at least three divisions at PDK International. It was the second step after resume screening. Kate Stephens, director of membership, stated, “Reggie thank you for putting the virtual interview protocol together, it really helped me identify quality candidates to bring in for the membership division and allowed me to gain a lot of time in the work day” (personal communication, February 1, 2018).

**Implications for Site**

There is an opportunity at PDK for a paradigm shift in how C-suite leads for internal and external impact. Sharma (2017) states, leaders that embody values rather than only talking about values are paradigm shifters. And it absolutely indicates that leaders all together avoid fundamentalism or any other isms or dogmatic perspectives. The courage to reimagine is centered firmly in our universal values and our insurgent action (p. 81). In my introduction, I wrote about how PDK was founded by white male educators as an exclusive membership association. At this present time Dr. Joshua Starr, a white male, is the CEO and he had an opportunity to change the operating narrative of PDK and be a truly shift the paradigm. Although I believe it is necessary for Dr. Joshua Starr to empower Mr. Albert Chen and Dr. Gislaine Ngounou to lead, it is not sufficient. I recommend a paradigm shift to C-suite, which calls for Dr. Starr to share power. Coincidentally, on the surface it seemed that power was being shared, I am calling for a radical change in collective power. For instance, Dr. Ngounou who is a social engineering genius wants to lead the senior leadership team meetings very differently than Dr. Starr, and it appears she is waiting for him to be comfortable with the shift. Additionally, Mr. Chen who is a business expert has
business modeling ideas that seem to be on hold until Dr. Starr can get a better understanding of the landscape. I have found in my research this to be very typical behavior of CEOs. Nonetheless, PDK cannot afford to be overly cautious and take the same old approach in a very complex and ever-changing world of economic and social impact in the education market. Many leaders have used empowerment as an engagement strategy or to bring people to the table to have their voices heard. So, I asked what will it mean for collective power and authority to be shared? And how can PDK leverage and be dedicated to collective leadership and collaborative power to radically transform the way business and people development is executed.

The complexity inherent in PDKs turnaround reminded me of the Seven Greatest Contributors to Change Management Success an article I read in my independent study with Dobbin Bookman, HBS Portfolio Director of OPM. In the research based article by Creasy and Taylor, they indicate the overarching message from the article focused on what’s missing from most change management strategies is a focus on the seven factors that contribute to success in change management initiatives.

1. Active and visible executive sponsorship
2. Structured change management approach
3. Dedicated change management resources and funding
4. Frequent and open communication about the change and the need for change
5. Employee engagement and participation
6. Engagement and integration with project management

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8 Dobbin Bookman is the Portfolio Director – Owner/President Management Program at Harvard Business School Executive Education
7. Engagement with and support from middle management

**Realizing collective impact**

The other discussion that PDK needs to have concerns what collective impact actually means for the C-suite team and the larger organization. There has been a healthy conversation led by Dr. Starr around balancing the need for collaboration and hierarchy. However, if Dr. Starr decides to continue to lead PDK like a traditional CEO, he may want to think about the C-suite team helping him see his blind spots and consider this example below:

Bennis (1997) argues, that we are stuck in a time warp regarding the one great leader.

And so we cling to the myth of the Lone Ranger, the romantic idea that great things are usually accomplished by a larger-than-life individual working alone. Despite evidence to the contrary – including the fact that Michelangelo worked with a group of 16 to paint the Sistine Chapel – we still tend to think of achievement in terms of the Great Man or the Great Woman, instead of the Great Group (p. 29).

Nonetheless, I believe collective leadership can play a major role in radically transforming the C-suite team. And, this requires the C-suite team to live its shared purpose and Dr. Joshua Starr, CEO, to not only empower his C-suite team but to radically share power. And that shared power requires a release of control by Dr. Starr that affords the other members of C-suite to make definitive decisions when Dr. Starr may not have a great understanding of the proposed actions. For instance, the virtual interview session mentioned in the glimpses for future came to fruition because Dr. Starr recognized the need

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to explore other options without his understanding or approval. This example has implications for many future decisions that may come up as part of the transformation of the C-suite team and PDK as an organization.

As I mentioned in the description, evidence, and analysis of the strategic project section, C-suite understands the tension between their espoused theory of becoming a more collaborative organization with the challenge of hiring eight new employees within the last six months. Heifetz and Linksy (2002) posit, “when you lead people through difficult change, you take them on an emotional roller coaster because you are asking them to relinquish something – a belief, a value, a behavior – they hold dear” (p. 116-117).

Having shared my understanding of the current state of PDK’s work culture based on staff survey data, interviews and observations, it was important that I took my recommendations a step further by leading C-suite through several learning experiences that centered on collective leadership. As PDK continued to hire new employees, I highlighted the need to both get people acclimated to their specific roles and duties and to create structures and practices to help people get familiar with one another to cultivate greater collaboration amongst the seven divisions operating under the umbrella of PDK International. Nonetheless, C-suite had the ultimate responsibility to begin to model and build toward better collaboration and to embody a collective leadership approach.

It is my hope that I provided PDK a pathway to realizing its core identity and collective leadership potential and that my strategic project heightened this tension by fostering a sense of urgency for the implementation of systems and practices that navigated opportunities inherent in transforming PDK into a collaborative work environment. Sharma (2017) makes this quite clear: “creating a safe environment for senior executive
teams to implement new ways of functioning in order to transform dysfunctional systems and norms is critical; and organizations need to encourage generative, value-based conversations and actions for change” (p. 126).

**Investing in senior executive team coaching**

Based on Hawkins (2017) continuum of team coaching, I am certain that a continued emphasis on team coaching for C-suite is a necessary component of systemically enhancing the impact of PDK International. At the team facilitation level, the goal is to mainly focus on process, absent from task and performance of the team. For team performance coaching the main objective is to center the work on team process and team performance whereas leadership team coaching emphasizes how senior executive teams enact collective leadership. Transformational leadership coaching encompasses the latter as well as a focus on transforming the business (p.75).

**Figure 4.1 Continuum of team coaching**

I recommend the following learning experiences to support the effectiveness of a systemic coaching process:

1. Calendarize a regular bi-weekly meeting (Make this time sacred).

2. Evaluate ROI of team coaching on a quarterly basis to determine the best approaches for C-suite (i.e. analyze evidence to date on whether approaches are producing expected results)
3. Reflect on C-suite’s exhibited behaviors and explore mindsets that are enabling as well as inhibiting radical transformation by collective leadership.

4. Dedicate time for individual and peer coaching using both internal (Dr. Ngounou) and external facilitators.

5. Create a process to capture the developmental journey to show stakeholders the lessons learned and to authentically drive this work to the larger organization.

6. Create a timeline to incorporate a developmental improvement process with the rest of the staff at PDK International.

Lastly, based on the learning experiences above, C-suite must remember to create a safe container for staff to engage in a developmental process that gets to the core of adaptive leadership and transformational change. Additionally, C-suite must continue to ask this question: How can we radically transform ourselves to transform our staff to transform the education sector to transform the lives of adults and children, especially the most vulnerable?

**Implications for Sector**

Advancing Collective leadership

Given today’s problems and opportunities in the education sector in the face of ambiguity, one thing is certain: the individual called the CEO, superintendent, or executive cannot do the work of leading an organization alone. A research study by Wageman (2008) of more than 120 leadership teams across a range of industries around the world found that only 21% were high performing, 37% were mediocre performing and 42% were poor performing. Therefore, careful attention must be paid to identify the best conditions for high
performing teams. The six conditions mentioned earlier in the RKA are necessary; however, the top leader also must share power for this to truly be a collective approach to leadership.

Transformational leadership is not something that can be accomplished with the heroic version of the lone leader coming to save the day or senior executive team operating as a group of individuals acting in parallel (Hawkins, 2017). Moreover, no longer should the main obstacles in organizations lie solely in the people or technical processes but in the interactions and relationships between people, teams, functions, and different stakeholder needs. The CEO may be the head but it is impossible for the head to do all the functions of the body. So, just like the other parts of the body have an integral role in well-being of the person, it is imperative that leadership and power is shared for sustainable growth and impact.

I believe it is time for education sector leaders to realize that sharing power is the essential ingredient to creating high-performing teams. It is difficult to achieve a high-performing team without changing the mindset of the leader, which rarely happens (Kanter, Stein, & Jick, 1992). Therefore, it must be considered that a commitment from a leader is to not only distribute leadership, but to share power. Although this easier said than done, it is time for leaders to consider that they are essentially a major reason why high-performing teams typically do not manifest. The sector needs leaders who want to be radical transformers. The radical transformer intentionally designs and implement initiatives that are pushing the edge of change rapidly, instead of being methodical with minimal impact changes that do not address root causes or systemic issues (Sharma, 2017).

Developmental Approach Needed

I also see an urgent matter for the education sector. The need to foster and grow its leaders and senior leadership teams. I often think about ways we can bring better solutions
to establish a people development culture in the education sector more broadly. Currently, there is a plethora of trainings for leaders to improve their technical skills; however, very few organizations focus their efforts on developing the mental complexity of their senior executives and their team. Applying the immunity to change map to increase C-suite’s ability to take on complexities using a collective leadership approach and to enhance the productivity and development of human capital. The immunity to change literature examined a radically new way to support leaders in knowing themselves better to spark personal growth and development.

Immunity to Change approach had a proven record for supporting chief executives and their C-suite team tackle their own big improvement goal and it provided a structure to tackle the complexities of personal and team transformation. Kegan and Lahey (2009) argue, “In reality, the experience of complexity is not just a story about the world. It is also a story about people. It is a story about the fit between the demands of the world and the capacity of the person or the organization” (p. 32). Chief executives’ level of mental complexity and ability to collectively lead must grow because the constant change we see in society and the world of work will continue to create new challenges for people and organizations to overcome. A high performing leadership team can tackle those challenges with much greater collaboration in order to create a meritocracy of ideas and assist each other’s thinking. However, this is more valuable when team members trust each other enough to disclose holes in one another’s thinking. Hawkins (20017) argues, too much or too little conflict is unhelpful in a team” (p. 69).

Looking Out
Bringing about change in the education sector requires us to look out at different industries to study their understanding of leader, leadership, and senior team development.

After researching different military literature, I was struck by the Army’s view on leadership and team development.

The Army Leader Development Strategy (ALDS) 2013 defines the career-long process by which they develop leaders at all levels across the Army. It states:

Leader development is the deliberate, continuous, and progressive process founded in Army values that grows Soldiers and Army Civilians into competent, committed professional leaders of character. Leader development is achieved through the career-long synthesis of the training, education, and experiences acquired through opportunities in the institutional, operational, and self-development domains, supported by peer and developmental relationships.¹⁰

Lissa Young, Assistant Professor in the Department of Behavioral Sciences and Leadership at West Point, explicitly stated that core to the leadership development at West Point is their ability to induce action because they simply control their environment. She noted that she understood that this concept is not the same for nonprofits. “However, education sector leaders and their leadership teams need to develop the knowledge and skill set to motivate their own inner self to own and lead the change they want to see in their organizations” (personal communication, September 13, 2017).¹¹ Additionally, I found many foundational principles from West Point that speaks to the content needed to increase knowledge and skill set of system level leaders in the education sector.

The most important aspects of WPLDS are the processes in place to guide the West Point Community in building, implementing, assessing and improving the Academy.
programs to:

- Maintain relevance in an ever-changing environment
- Better achieve the WPLDS Outcomes and USMA Mission
- Continuously strive for excellence in all programs

**Business and People Development**

I recognize that the education sector has been dealing with a shrinking budget and financial uncertainty for the last decade. However, my reflection on my residency has made me consider the ways in which business and people development can be seen as one whole instead of competing dichotomies. The reality in many organizations is that the priority begins and ends with financial resources. However, I believe that this is the right time to address the monolithic focus on fiscal management. Although financial implications are a major factor in organizational functioning, it cannot become the only benchmark or measure of success. People development plays a vital role for organizations trying to meet its revenue targets and reach financial outcomes. And often organizational investment in staff development has shown to yield tremendous benefits for both the employee and the business. Too often organizations hesitate on implementing new initiatives because they do not have the financial resources for outside consultants or trainings. However, if organizations in the education sector had some of their employees explore the dimensions of DDO and read the literature on immunity to change, then they could designate key internal people to lead the work. I think this is a viable option for organizations in the education sector and should be investigated as a path to creating a flourishing ecosystem.

**Conclusion**

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12 United States Military Academy, WPLDS – West Point Leader Development System 2015.
As I reflect on my time at PDK, I often reflect on my new understandings and future approach to making meaning of the workplace. I began by seeing staff as human beings in all the ambiguity that come with working through differences, interactions, failures, and triumphs. I developed a deep sense of valuing others and honoring their strengths, weaknesses, preferences, and displeasures. I found myself considering my own biases on a daily basis and considered ways in which I might have viewed an interaction or work product differently than someone else. And instead of searching for ways to build my position, I began to make a way for excellence through building with difference. I then felt a natural tendency to look out at the educational ecosystem and imagined the possibilities of collective energies that could lead to each workplace taking a human centered developmental approach to its people at every level of an organization.

To support PDK in implementing this type of work culture, I chose to model vulnerability and use it as my foundation to build trust at every level in the organization. Phase one of my residency outlined the approach I took to model vulnerability by allowing staff to get to know me better (past-present-future self) to build trust. The latter part of phase one afforded me the opportunity to broaden my understanding of actors and actions in the organizational context in a meaningful way. This entry strategy allowed me to gain valuable insight into the politics of the organization. Again, this was a new experience for me, and I decided to jump all in to the messiness of bringing my true self to the work. The evidence of the impact of this approach was that staff began to seek me out and were very comfortable sharing their thoughts, feelings, actions. Consequently, I believe this approach paid huge dividends for me in the short and long-term. I was able to develop the relational
trust needed to identify potential pathways for a strategic project that would be meaningful and impactful to the organization and its stakeholders.

Further, the opportunity my strategic project presented to PDK International an organization going through a strategic reset and turnaround phase provided unique challenges for my research and interventions. Phase two deepened my understanding of PDK international, and I defined a strategic project, theory of action, and a set of interventions for C-suite to help them develop a shared purpose and engage in a team developmental process for collective leadership. Phase two afforded me the opportunity to take a senior executive approach to transforming an organization in a state of flux. The transition from phase one to phase two set the stage for a more thoughtful approach to phase three and allowed me to view the organization from the “balcony”. Therefore, I was able to design and implement several high-level interventions with C-suite. As my strategic project ends, I am noticed the gap in providing PDK a guidebook to persist with the necessary learning needed to radically transform the organizational culture at PDK International. Philip Sadler (2002), in Building Tomorrow’s Company, defined ‘transformational leadership’ as: ‘The process of engaging the commitment of employees to radical change in the context of shared values and a shared vision’. However, Gislaine Ngounou, chief Program officer, can lead this type of transformation if given the time and control to do so.

Helping C-suite develop a shared purpose and engage in a collective leadership process around an improvement goal was a fascinating, yet tricky journey. I was in the presence of exceptional leaders, and I carefully articulated a need for C-suite to be my unit of change. And to continue their growth as a collaborative force. The future of
organizational success at PDK in both business and people development requires an approach to workplace culture that provides the necessary container for every employee to thrive and grow. I am placing my bet on C-suite establishing its core identity and building a collective leadership approach as a path forward and the catalyst that PDK International needs to drive its revenue and social impact goals to new heights in the education sector. Our changing society and the complexities inherent in the education sector demands that we continually challenge our own thoughts and raise expectations of senior executive teams within organizations.

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APPENDICES

Appendix A
PDK SHARED PURPOSE PROTOCOL

Process
Step 1. Imagine A BETTER NOW and FUTURE
■ Say: “You are going to develop an internal shared purpose. This is the picture of what you want to be as a C-suite team NOW and FUTURE. We are not going to discuss the obstacles now, but what we most want to see happen NOW and FUTURE.”
■ Ask Josh, Gislaine, and Albert to think and write about C-suite’s purpose internally (as it should be).
■ Say: “Imagine you have created a better version of C-suite. What picture do you see in your mind that represents that accomplishment?”
■ Everyone writes a statement on chart paper to describe his or her vision for C-suite’s purpose internally.

Step 2. Record key elements of purpose statements
■ Ask them to record the key elements or phrases of each other’s shared purpose statement
on four-by-six-inch cards or removable self-stick notes. (the group should write only one element or key phrase on each card.)

Step 3. Organize elements and key phrases into categories
■ Ask each group, one group at a time, to tape its cards showing key elements on the wall (or on a set of flip charts taped to the wall).
■ Ask each successive group to place its cards with other cards that have similar elements. If a card doesn’t fit with any other card, it stands alone.
■ Once all the cards are posted, ask the participants to come up to the wall and move the cards around, grouping similar messages and phrases together until they are all arranged into categories. (For example, put all the cards related to serving clients in one category, and all the cards related to clean clinics in another category.)

Step 4. Integrate your vision with others
■ Bring the participants together and ask them share to their purpose of their NOW accomplishment with each other.
■ Ask the participants to create one shared purpose combining the best aspects of all purposes.
■ Discuss the combined living shared purpose…

Step 5. Present the draft shared purpose statement
■ Write the shared vision on a clean flipchart.
■ Put the shared purpose statement in the front of the room for all to see. This initial shared purpose statement will probably need to be fine-tuned. It should help guide further discussions and refinement.
Wrap up and plan next steps
■ Decide on a deadline for finalizing this draft shared purpose statement and who needs to be involved in finalizing it, and finalize the shared purpose statement.
■ Discuss with the group how to use the shared purpose as an alignment tool;
■ Discuss the final shared purpose statement with people (other stakeholders) outside your immediate group who need to know your shared purpose or could help you move closer to realizing the vision.
■ Make the shared purpose statement accessible (and easily visible) to everyone who will be involved in working to achieve it.
■ Remember that the process of creating a shared purpose together is what makes it powerful.
Giving the statement to others who were not involved in the process will not have the same power.
C-Suite Shared Purpose

* To be critical friends/colleagues who can/do balance support/Accountability
* Model the kind of culture we want to see throughout the organization
* Create a work environment that promotes good work & take care of the people in the work (personally/professionally)
* Commit to personal growth
SHARED PURPOSE

1) COMMON GOALS - OR CLARIFIED GOALS
2) MAXIMIZING TALENTS & DESIRES
3) RECOGNITION OF WORK
4) UNDERSTANDING WHERE WE ARE IN MASLOW'S
5) UNDERSTANDING OUR COLLECTIVE & INDIVIDUAL LIMITATIONS
6) DITTO ON ASPIRATIONS
7) BEING A BETTER ME
Clear understanding of specific responsibilities relative to various projects/units/initiatives, w/ clarity on who’s directing staff.

2. Regularly scheduled purposeful meetings - Budget, Board, Strategy, Staff, Items Development.

3. Clear allocation of resources including to strengths (C + SHG).
Appendix B
Strategic Project Timeline

PDK Strategic Project Timeline

<table>
<thead>
<tr>
<th>Summer</th>
<th>Fall 1</th>
<th>Fall 2</th>
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<td>(2 weeks)</td>
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</tr>
<tr>
<td>PDK Residency</td>
<td>Strategic Project Identification</td>
<td>RKA</td>
</tr>
<tr>
<td>ENGAGEMENT</td>
<td>ASSESSMENT</td>
<td>Strategic Project Application</td>
</tr>
<tr>
<td>PDK Staff Story</td>
<td>Evidence Collection</td>
<td>Strategic Report</td>
</tr>
<tr>
<td>Historical Context</td>
<td>Decision Analytics</td>
<td>Survey Data</td>
</tr>
<tr>
<td>Resource Analytics</td>
<td>Strategic Impact</td>
<td>Behavioral Science</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Spring 1</th>
<th>Spring 2</th>
<th>Fall 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3 weeks)</td>
<td>(3 weeks)</td>
<td>(6 weeks)</td>
</tr>
<tr>
<td>Informal Interventions</td>
<td>Formal Interventions</td>
<td>Strategic Impact</td>
</tr>
<tr>
<td>Reflection</td>
<td>Results</td>
<td>C-suite Impact</td>
</tr>
<tr>
<td>INSIGHT</td>
<td>REORIENTATION</td>
<td>Strategic Impact</td>
</tr>
<tr>
<td>Interviews</td>
<td>Meetings</td>
<td>(3 weeks)</td>
</tr>
<tr>
<td>Meetings</td>
<td>Journal</td>
<td>(3 week) (beyond)</td>
</tr>
<tr>
<td>Peer Coaching</td>
<td>Testing</td>
<td>Strategic Impact</td>
</tr>
<tr>
<td>Collective Big Assumptions</td>
<td>Analysis</td>
<td></td>
</tr>
</tbody>
</table>

Engage Assess Insight Reorient
Appendix C

Default Question Block

The questions for the following assessment have been carefully generated by my observations, conversations, and meetings with PDK staff. They are based on An Everyone Culture: Becoming a Deliberately Developmental Organization (http://www.waytogrowinc.com/) and the desired outcome to support your growth and work at PDK International. Thank you in advance for your time!

Rating Scale

Use this scale to indicate the extent to which you agree or disagree with the following statements:

<table>
<thead>
<tr>
<th>1- Strongly Disagree</th>
<th>2- Somewhat Disagree</th>
<th>3- Neither Agree or Disagree</th>
<th>4- Somewhat Agree</th>
<th>5- Strongly Agree</th>
</tr>
</thead>
</table>

Personal Growth (Edge)

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>In my role, I feel like I have the opportunity to grow my skill sets and knowledge every week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most PDK staff know my strengths</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most PDK staff know my limitations/areas for growth</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C-suite encourages me to actively stretch myself on projects on a daily/weekly basis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Default Question Block

The questions for the following assessment have been carefully generated by my observations, conversations, and learning with all staff at PDK. They are based on An Everyone Culture: Becoming a Deliberately Developmental Organization (http://www.waytogradinc.com/) and a desired outcome to support business and people development at PDK. I ask that you rate the degree each one has - in your opinion - in moving the needle on trust, vulnerability, business development and people development. And thank you all very much for supporting my leadership growth!

Rating Scale

Use this scale to indicate the extent to which you agree or disagree with the following statements:

<table>
<thead>
<tr>
<th></th>
<th>1- Strongly Disagree</th>
<th>2- Somewhat Disagree</th>
<th>3- Neither Agree or Disagree</th>
<th>4- Somewhat Agree</th>
<th>5- Strongly Agree</th>
</tr>
</thead>
</table>

Personal Growth (Edge)

In my role, I feel like I have the opportunity to develop my level of complex thinking on a daily/weekly basis

Most PDK staff know my strengths

Most PDK staff know my limitations/areas for growth
## Exercise 1: Honing Your Immunity Map

A powerful "diagnostic" immunity map provides a snapshot picture of what your immunity to change looks like, including what the basic Big Assumptions are that give rise to your immunities. You’ve now had a chance to “sleep” on the first draft of your map. The purpose of this exercise is to review that draft and revise it, if needed, so that 1) it feels compelling to you, 2) you understand what your current immunity to change is (you see how you have a “foot on the gas” and a “foot on the brake” all at the same time), and 3) you have a testable Big Assumption.

<table>
<thead>
<tr>
<th>1. Commitment (Improvement Goal)</th>
<th>2. Doing/Not Doing (Instead of?)</th>
<th>3. Hidden Competing Commitment</th>
<th>4. Big Assumption(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRITERIA:</td>
<td>CRITERIA:</td>
<td>CRITERIA:</td>
<td>CRITERIA:</td>
</tr>
<tr>
<td>– True for you</td>
<td>– Behaviors (not emotions)</td>
<td>– Follows from the fear</td>
<td>– See how it affects</td>
</tr>
<tr>
<td>– Implicates you</td>
<td>– That work against col. 1</td>
<td>– Commitment in self protection</td>
<td>your immune system</td>
</tr>
<tr>
<td>– Room for improvement</td>
<td>– Not &quot;why&quot; or what you</td>
<td>– Shows why col. 2 behaviors</td>
<td>– Make “Big-Time-Half”</td>
</tr>
<tr>
<td>– Important to you</td>
<td>should do about it</td>
<td>make good sense!</td>
<td>conclusion for you</td>
</tr>
<tr>
<td></td>
<td></td>
<td>– You see the immune system</td>
<td>– Shows a bigger world for</td>
</tr>
<tr>
<td></td>
<td></td>
<td>and it feels powerful</td>
<td>you (“I must not enter”)</td>
</tr>
</tbody>
</table>

Wings At Work®, 2014
Struggling to Implement

1) Structure for C-Suite to meet time
2) Not sure to guide our
done
3) Accountability metrics, pay/ops/personal
4) Goals: Staff assessment
5) Own learning & Growth
6) Different viewpoints - theater/stand/wise
7) Progress, Success, Complexity

We are committed to becoming better at...

carving out speed, trust, and process to do the work that it takes to guide & lead the organization.
Doing / not doing instead:

- Putting out fires (behavior)
- We tend to...
  - Talk about immediate issues
  - Focus on survival strategy, not the future
  - Stretch ourselves thin on time
  - Overcommit

We do not:
- Make our work transparent
- Prioritize the time for us to commit to do "the work"
- Create the brain space to do the work
Hidden Competing Commitments

I worry that we will...
* not know what to do/mess obvious stuff
* become adrift
* become bored
* seem incompetent

I am committed to not being seen as...
* Missing the obvious stuff
* Not being decisive or solving problems
* Incompetent
* Going in different directions
* Not a team player
* Favoring anyone due to gender, race, religion
* Having all the answers
**COLLECTIVE ASSUMPTIONS**

If we miss the obvious stuff then the organization will die.

If we seem incompetent then we will not inspire others to do their best work.

If we actually dive into the work then we will expose our gaps/shortcomings/vulnerabilities.

If we go in different directions then we may create silos.