

Event 14

Capacitate the Leadership Team

When and Why To Use this Event

Who conducts this event. The facilitator, the Leadership Team, and the new Leadership Team members.

Intent. The intent of this event is to begin the preparation of the Leadership team regarding interpersonal relationships, team dynamics, trust building, and an understanding of systemic thinking, systemic change, and the elements of this change process. It is also intended to begin to create the kind of culture that had developed on the Core Team.

When. This event should be undertaken as soon as possible after you have formed the Leadership Team (Event 13).

Context. By this time you have already selected the Leadership Team members. The retreat will likely be based to some extent on the retreat for the Core Team, and it will likely serve as a model for later use in capacitating additional teams as the change process evolves. Following the completion of the retreat, the Leadership Team will be prepared to begin to engage in the systemic change process.

Synopsis. This event entails the Core Team planning a two-day overnight retreat designed to capacitate the Leadership Team and build the team members' knowledge with respect to systemic change (Activity 14.1). It entails the Leadership Team members engaging in the retreat (Activity 14.2). And it entails debriefing the retreat (Activity 14.3).

Rationale. If you skip this event you will find that the Leadership Team is not prepared to function in their role nor handle their responsibilities in the change process from a well grounded position. When teams form without focused effort on creating the proper dynamics, and understanding of those dynamics, then the culture and identity of the group is often influenced by an individual or subset of the team. If the team does not engage in creating interpersonal and group relationships, then the team efforts will be fraught with tension and fragmentation which plays out in decision making in the change process. Capacitating the Leadership Team and building their knowledge about the change process is essential to their leadership of the change process.

Implied Values. Culture (change), design, dialogue, disclosure, group dynamics, interpersonal skills, participant commitment, openness, process orientation, relationships, reflection, respect, social tolerance, space, systemic thinking, time, and trust.

Prerequisites. Event 5.

Calendar Time. 1-2 months.

Interlinkages. Continuous Event A: Engage in reflection; Continuous Event B: Build and Maintain Motivation; Continuous Event C: Build and Maintain trust; Continuous Event M: Develop Group-process and Team-building Skills; Continuous Event N: Build Team Spirit.

Goals

1. To design and implement a capacitating process for the Leadership Team.
2. To establish a culture of design for change within the district and community.
3. To begin to develop the skill and knowledge base of the Leadership Team.

Activity 14.1

Design the Retreat

When and Why To Use this Activity

Who conducts this activity. The facilitator and the Core Team.

Intent. The primary intent of this activity is to design the retreat for capacitating the Leadership Team and establishing a design culture for change.

Synopsis. This activity entails the Core Team members and facilitator designing a retreat experience to capacitate the Leadership Team and build the team members' knowledge with respect to systemic change. The design will be based on their own retreat (Event 6). This process will entail modifying the design of the Core Team retreat based on their perceptions of what worked well (and did not work well) in that retreat, as well as their perceptions of the unique needs of the members selected for the Leadership Team.

Calendar Time. 2-4 weeks (2-4 Core Team meetings).

Interlinkages. Continuous Event A: Engage in reflection; Continuous Event B: Build and Maintain Motivation; Continuous Event C: Build and Maintain trust; Continuous Event M: Develop Group-process and Team-building Skills; Continuous Event N: Build Team Spirit.

Goals

1. To design a capacitating process for the Leadership Team.
2. To build a culture and capacity for design for change within the district and community.

Process

The Core Team should become as familiar as possible with the people selected for the Leadership Team (their backgrounds, relationships to the district, initial strengths they bring to the design team, etc.). The Facilitator and Core Team members should review and re-design this whole process (Activity 14.1) before they engage in it. All Core Team members should review the values they adopted at their own retreat.

1. Prepare for re-designing the Retreat.

Clarify the purposes of the retreat and how they relate to the larger systemic change effort. Explore how the retreat experience will inform similar capacitating processes for subsequent teams later. This would be a good time to review readings and materials related to group dynamics, team building, experiential or outdoor learning, and self-assessment processes.

(Time: 1/2 hour)

2. Review and revise the process for re-designing the Retreat.

Prior to re-designing the Retreat, it is important for you to review the re-design process described here in Step 3 and decide what revisions are needed. Review Activities 14.2 (Conduct the Retreat) and 14.3 (Reflect on the Retreat), as well as Step 3 of this activity, prior to revising this activity. The following considerations may prove useful in revising the re-design process.

Considerations for Revising the Re-design Process

The values that should guide all your re-design activities.
 The purpose of re-designing the Retreat (capacitating process), and how re-designing differs from revising the previous Retreat.
 The amount of time that is realistic for all team members to engage in a re-design process.
 The types of data that should be considered in the re-design process.
 Whether or not you will want an outside facilitator to facilitate the Retreat (so the Facilitator and Core Team can focus on becoming a team). If so, the outside facilitator should probably be involved in the re-design process.
 Methods for recording or documenting your refinement of the re-design process (you may elect to use reflective journaling, audio or video recording, observational notes, etc.).

(Time: 1 - 2 hours)

3. Use the revised process for re-designing the Retreat.

It is important for the Facilitator and Core Team to understand that the guidance provided in this activity, and Activities 14.2 & 14.3, are intended to be re-designed to fit the needs of the Leadership Team members as well as become more contextually sensitive to the district/community in which the members work and live.

Following is a list of considerations for re-designing the Retreat.

Considerations for Re-designing the Retreat
What amount of time (1-3 days) will be appropriate for the Retreat?
Does the design consider pre-Retreat time for resting and preparing for the capacitating process and post-Retreat time for resting and returning to professional responsibilities?
What should be the breadth and depth of the capacitating process? (A packed agenda takes away from building the group dynamics. Fewer agenda items allow more time for deep processing and establishing strong group dynamics.)
Identify what logistical needs there are (such as meals, equipment, overnight supplies like bedding, clothing, maps, etc.).
What retreat or professional development setting is available that provides both indoor facilities (overnight accommodations) and outdoor experiential learning opportunities (ropes course, climbing wall, etc.)?
What physical, psychological, etc. constraints, if any, do Leadership Team members have which pose design issues to be considered?
What types of team building and group dynamics activities can be supported by the retreat facility?
How can you create a safe environment for engaging in conversations oriented toward constructing meaning and understanding?
How will various types of assessment inventories or instruments (learning styles inventory, personality inventory, trust inventory, etc.) be used in the capacitating process?
How much time and opportunity for reflection, dialogue, and processing of the experiences will be allowed? (Providing protected time for personal reflection is important to processing individual experiences.)
Will there be an outside facilitator for the Retreat? Who will serve as outside facilitator and does the person have the required skills? What role should that person play?
Will the outside facilitator be a formal part of the design process for creating the Retreat?
How does the Retreat design address the potential of outside biases from the external facilitator?
What preparation does an outside facilitator need before working with you?
What types of data should be collected during the Retreat (inventories, instrumentation, etc. for self-examination; group dynamics data; etc.)?
Continue meeting until the Core Team feels comfortable with the design of the Retreat and its ability to fulfill its purposes.
Reflect on the Retreat design and critically evaluate if it will accomplish the purposes and goals identified.
Confirm a time for post-Retreat reflection and debriefing of the capacitating experience.
Review related readings on ESD, systemic thinking, group dynamics, outdoor and experiential learning, team building, trust, and change relationships.

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The following is a sample process for you to revise.

3.1 If an **outside facilitator** will be used for the Retreat, then the decision should be made now and that person selected and brought into the redesign process.

3.2. Review relevant assessment data collected up to this point, and identify any **previous experiences** in team building or capacitating processes which are a part of the District's change culture/history, including the initial Core Team retreat. Isolate positive or successful experiences that district personnel have identified and determine whether or not they offer any insight in terms of designing the capacitating process for the Leadership Team.

3.3. Based on their experience in their own retreat, the Core Team (and outside facilitator for the Retreat, if any) should engage in a dialogue about the **values** that the Core Team adopted in their retreat, and add or delete any that the Core Team feels are important for this Retreat.

3.4. Review and revise the **purposes** and goals of the Retreat (developed in Step 1).

3.5. The Core Team (and outside facilitator for the Retreat, if any) should try to take a **big-picture view** of the retreat, given its purposes, and dialogue about how the big picture might be improved over the initial Core Team retreat, in terms of the overall process for building group dynamics and trust, how they will learn together, how they will explore and make sense out of their common experience, all the while taking into account the considerably larger group for the LT Retreat. (These should be guided by the selected values and purposes/goals participants believe are important for capacitating processes.) This is an opportunity to think outside the realm of their experience in the Core Team's retreat.

3.6. Establish timelines for the Retreat in terms of when and how long it will be, when the post-Retreat debriefing will be, and alternative dates if required. It is recommended that the Retreat take place shortly after the Leadership Team is formed, to take advantage of the excitement and momentum generated during Event 13. Keep in mind that the Leadership Team should not meet before the Retreat is conducted. To do so could establish a mode of operation and culture counter-productive to the change effort.

In determining the length of the Retreat, keep in mind that the amount of time allocated to the capacitating process contributes directly to the impact of the Retreat. The length determines in large part how many experiences may be incorporated in the Retreat and the opportunity for reflection and connecting as a team.

3.7. Develop **more detail for each purpose** of the Retreat, keeping in mind the values and big picture. It may help to review the agenda for the Core Team's retreat.

3.8. Identify what **activities or mechanisms** are needed for each purpose to be achieved during the Retreat, including active facilitation and support systems.

3.9. Combine those activities into a **schedule of activities** (review the sample below, as well as the schedule for the initial Core Team retreat), considering how the first day will integrate and relate to the second day of the Retreat, and vice versa. (How does an experience of ropes courses or other outdoor experiential learning activity connect to the process of building trust, self-assessment, reflection, building group dynamics, etc.?)

Possible Schedule for the Retreat

Morning of first day:

Travel to Retreat site together as a Leadership Team. (While optional this experience begins the bonding of the team and establishes the importance of sense of community versus individualism.)

Engage in reflecting and identifying concerns or discomforts each person feels. (This helps to identify the social and psychological context for the capacitating process.)

Engage in trust-building activity, such as a rope activity. (This requires facilitation to make connections to systems thinking, group dynamics, team learning, etc.)

Afternoon of first day:

Participate in self-assessment using personality style inventory. (This requires facilitation by a person grounded in use of the adopted instrument.)

Examine how personalities contribute to group dynamics and functioning as a team. (This helps individuals to understand the contribution that diversity brings to the team and an awareness of how the many personalities of different stakeholders contribute to the complexity of the systemic change process.)

Formal reflection time apart from each other (20-30 minutes for journaling). (It is important to preserve reflection time for examining and integrating experiences into personal mindsets.)

Experiential activity (outdoors if possible) for team building. (This is important to breaking down boundaries and engaging in risk taking.)

Self-disclosure process attempting to examine experiences of the activity. (This requires facilitation to provide a safe space for sharing more personal parts of individual identities and feelings about the process/experiences.)

Evening of first day:

Evening meal together. (Optional: Leadership Team prepares meal together versus having it catered.)

Watch Mindwalk movie and engage in reflection and dialogue. (This stimulates systems thinking and creates a dialogue context for second-day experience.)

Morning -afternoon of second day:

Participate in a ropes course, climbing walls, etc. or other formalized outdoor experiential setting which provides opportunity for establishing group dynamics and teaminess. (This is a major contributor to creating group dynamics and establishing a common experiential context from which the collective identity of the team emerges and can be built upon over time.)

Reflection and dialogue about the experience. (It is important to allow time for examining participants' perceptions related to the Retreat and for bringing closure to the formal Retreat experience, and establishing process linkage to your formal debriefing time.)

3.10. Plan a meeting of the Leadership Team for debriefing the Retreat.

The Core Team should plan a meeting for the Leadership Team to reflect on their Retreat experience, and the meeting should be scheduled prior to engaging in the Retreat. By establishing a timeline for reflection and debriefing their experiences, the Leadership Team members will see the flow and continuity in the process and make connections to the continuing nature of the change process. Also, team members often find it more difficult to focus on setting a meeting time at the end of the Retreat and may want to postpone this until a later time. It is essential that a schedule be set prior.

(Time: 2 - 4 hours)

Potential Problems with the Process

The following are some of the problems you may anticipate in trying to conduct this process:

- Individuals may find the idea of ropes courses or other outdoors experiential learning frightening and uncomfortable. Likewise, the idea of participating in various self-assessment inventories may threaten them and add anxiety or tensions to the design process. It is important that everyone understand the importance of each activity or experience in building trust and strong group dynamics.
- Individuals may not understand the complexity of re-designing the Retreat, and the need to consider every dimension of the capacitating process. It is important that specific attention be given to every level of systems design, and that all design considerations provided in the activity be reviewed.
- Selecting a co-facilitator to assist with the Retreat may be viewed by the process facilitator as unnecessary. Facilitators may view their position or role as threatened by an outside person and attempt to direct the Core Team away from this decision. Since the Retreat is for both the Facilitator and the Leadership Team, it is important to consider the role a co-facilitator plays in enabling all individuals to be active participants in the Retreat.
- Individuals may opt for reducing the amount of time allotted to a Retreat below that provided in the suggested configurations. The amount of time provided in the design for a capacitating process relates directly to the quality and success of the Retreat. The optimum is the two-day configuration, while the one and one-half day configuration is minimum. The overnight experience is a critical element of the overall capacitating process and provides a context in which everyone is somewhat vulnerable and at risk, each of which is important to creating a group dynamic and teamness.

Understandings

Given the importance of helping the people you are working with to understand the need for, and nature of, systemic change, we offer the following suggestions for specific understandings you may wish to work on. Again, please do not feel you have to use these understandings, and we hope you will identify other understandings you think are important. We encourage you to carefully consider *why* you are accepting, rejecting, or adding each understanding.

Goals:

1. To design a capacitating process for the Leadership Team.
2. To gain additional experience in design for the Core Team.

For Goal One.

What is involved in a design process?

What is a capacitating process?

Why is a capacitating process important to the Leadership Team?

What change relationships were there established through re-designing process?

What role did facilitation play in the design process?

For Goal Two.

What is the relationship of a culture of design to the Core Team? To the systemic change process?

What is required to establish a culture of design? Of change?

How does re-designing the capacitating process contribute to a culture of design? Of change?

For The Entire Activity.

How did the participation of the Core Team members in the design of the Retreat contribute to the "goodness-of-fit" of the design?