

Phase 1

Activities

Team Selection

Source: J. Borree



Purpose: To help a small number of people interested in a topic recruit others to form a team.

Resources Needed: Paper, pens, flipchart

Procedure:

1. Make a list of potential / prospective team members, or review your group using the following questions:
 - a. Who is willing?
 - b. Who has demonstrated interest in and past involvement with diversity issues / activities?
 - c. Who will make the time / energy commitment?
 - d. Who has energy available for this work?
 - e. Who deserves the opportunity to have a deep, rewarding, positive team experience?
 - f. Who works well with others, is creative, fun, and willing to evolve?
2. Ask prospective members for commitment to the process.
3. Give your group a name and pick a symbol or logo to represent your group.
4. Make a list of the members and give it to appropriate people for dissemination throughout the system.

Evaluation:

1. Did people want to become part of the new group? Why or why not?
2. Do you need to change how you are "selling" the idea? What



Five Card Draw

From *100 Ways to Build Teams*, by Carol Searce, 1992.

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Arlington Heights, IL

Purpose: To help the new team members establish roles.

Time Required: 30 Minutes

Resources Needed: 1 Set of role cards

Procedure: Put the roles and descriptions below on 4" x 6" cards. Ask each person to draw a card and read the role and role description. The members then discuss which roles would best suit them. Feel free to add role descriptions.

Card 1 Leader

- Keep team on task.
- Make sure everyone participates.
- Lead the discussion for the next agenda.

Card 2 Recorder

- Record the minutes.
- Do chart work if necessary.

Card 3 Timekeeper

- Keep up with time and give 10-minute warnings and 5-minute warnings so meeting doesn't run over allotted time.

Card 4 Materials Person

- Bring necessary materials to meeting.
- Set up meeting space if any equipment is needed.

Card 5 Observer

- Collect data on teaming skills and give feedback on how the team is doing.

Card 6 Encourager

- Tell team members when they do something well and encourage them when they are down.

Card 7 Question Captain

- Make sure all questions are answered or will be answered by the next meeting.
- Keep a list of important questions.

Card 8 Checker

- Check the team's perceptions of what is going on.

Innovate with C.A.R.E. Personal Profile

Source: *C.A.R.E. Profile*
Carlson Learning Company



Time Required: 1.5 Hours

Resources Needed: Innovate with C.A.R.E. Personal Profile,
Paperclips or Coins

(Wisconsin schools and organizations: For a complementary copy, contact Melissa Keyes, Keyes Consulting, Inc., Madison, Wisconsin. Phone 608/256-2156.)

Background: Observation and research by Fahden and Namakkal over two decades, and extensive psychometric research by Carlson Learning Company, have revealed several distinct approaches to thinking and behavior among people involved in a team-innovation process. When working with others to accomplish a specific purpose, people combine their natural thinking and behavior preferences into a unified approach.

By understanding the various approaches used by individual contributors in the team innovation process, the roles of team members can be defined and the team-innovation process enhanced, resulting in higher team performance.

The interactive relationship of the four approaches are graphically portrayed by the Innovate with C.A.R.E. Profile grid. An individual's approach score identifies her or his preferred role on an innovative team.

The purpose of the profile is to help team members understand what approach they most naturally use when working with others to accomplish a specific purpose, and to identify what role each member plays.



Procedure:

1. Individual members fill out and score the profile according to directions. Discuss.
2. Discuss the team members' roles and strengths.

Evaluation:

1. Do team members understand that everyone brings a needed strength to the team? Can they see that even those who seem to be holding things up are really those "refiners" who are pushing the rest to defend, explain, and upgrade their ideas?

Acknowledging One's Personal Cultural History

From *Beyond Heroes and Holidays: A Practical Guide to K-12 Anti-Racist, Multicultural Education and Staff Development*, Edited by Lee, Mearns, & Okazawa-Rey. Used with authors' permission.



- Purposes:**
- To recall and reflect on one's earliest and most significant experiences of race, culture, and difference.
 - To think about ourselves as cultural beings whose lives have been influenced by various historical, social, political, economic, and geographical circumstances.
 - To make connections between our own experiences and those of others.

Time Required: 2 - 3 Hours (15-20 minutes to draw, the rest for presentation and discussion)

Resources Needed: Big sheets of newsprint or flip-chart paper, bright-colored markers and crayons, masking tape.

Procedure:

1. Provide each team member a sheet of newsprint. Answer the following questions using drawings, symbols, and color rather than words:
 - What is your racial and ethnic identity?
 - What is your earliest recollection of observing someone being excluded from your group based on race or culture?
 - What is your earliest recollection of being different or excluded, based on race or culture, by those around you?
2. After the drawings are completed, discuss the process of doing this exercise.
 - How did it feel to think about and answer the questions?

Beyond Heroes and Holidays © 1998, is available through its publisher:
NECA, PO Box 73038, Washington, DC 20056. Phone 202-238-2379.



- How did it feel to use a medium which most of us are not accustomed to using?
3. Each person should share his/her story and drawing in 5-10 minutes time. Listeners may ask only factual questions, such as the name of the town where the person lived and demographics of the community.
 4. Hang the drawings around the room so they are visible to the team.
 5. After all have shared their histories, analyze the collective experiences. Draw on such factors as geography, historical time period, race, class, religion, and gender. Questions to ask might be:
 - What similarities and differences do you notice in everyone's experience?
 - What are some of the major forces, in families, communities, society, historical time periods, etc., that shaped each person's experiences?
 - How did oppression, discrimination, and prejudice affect team members' lives?
 - If some members were not noticeably affected, why weren't they?
 - In what ways were people privileged, or disadvantaged? Why?
 - What does it mean to be a person of color in the United States?
 - What does it mean to be a person of European heritage in the United States? (see "White Privilege," referenced in this document)
 6. From this discussion, think about the three levels at which social phenomena occur: the individual/family (micro), community (meso), and institutional (macro) levels. Make a diagram on poster paper of three concentric circles. The center circle should be labeled Micro; the middle circle, Meso; and the outside ring, Macro. Use arrows going from one to another of the circles to illustrate the relationship of one level

to another. Draw conclusions about the dynamics of oppression at all three levels across racial and cultural groups.

For example, many people identify school (an example of micro, the individual, coming together with meso, the community) as the place where they first noticed differences. At school, they were made to feel inferior or insecure (or secure and superior), or watched another child treated that way, with the teacher often being one of the perpetrators of discrimination, prejudice, and indifference. If this were the case for some team members, it will be important to ask the team what role schools play in the dynamics of oppression. Similar analysis can be done on any other institution, such as the media, criminal justice system, government, religion, and so forth. Also, think about how communities, families, and individuals resisted, countered, and transformed oppressive actions and institutions.

Questions to ask include:

- How did schools (and other institutions such as the media, religion, etc.) support and promote oppressive practices?
- How was what happened in one institution supported by others?
- What strategies did communities, families, and individuals use to resist discrimination or organize on their own behalf?

Evaluation:

1. How have your own personal experiences shaped your conceptions of self?
2. How have your experiences influenced you as a professional, as a member of the system?
3. How have your cultural and racial experiences influenced your view of yourself in your job?
4. How have these experiences shaped your views of those who are from racial and cultural groups different from your own?
5. What impact do these collective experiences have on the system?
6. How might the system impact the individuals within it?
7. Is there a dominant culture in your system? What impact might a dominant culture have on other members of the system?



Describing Your Personal Vision

Time Required: 2 Hours (depending on the number of members on a team, may pair people or do in 3's)

Procedure:

1. Each person reflects on the following questions:
 - a. Imagine achieving the results in your life that you deeply desire.
 - What would they look like?
 - What would they feel like?
 - What words would describe them?
 - b. If you could be the kind of person you wanted to be, what would your qualities be?
 - c. What material things would you like to own?
 - d. What is your ideal living environment?
 - e. What is your desire for health, fitness, athletics, and anything to do with your body?
 - f. What types of relationships would you like to have with friends, family, others?
 - g. What is your ideal profession or vocational situation?
 - h. What would you like to achieve in the arena of individual learning, travel, reading, or other activities?
 - i. What is your vision for the community or society you live in?
 - j. Imagine that your life has a unique purpose--fulfilled through what you do, your interrelationships, and the way you live. Describe what that purpose might be.
2. Share with your partner(s). One talks, the other(s) listen for understanding.
3. Go back over the elements of your vision and answer the following questions for yourself:
 - a. If you could have this now, would you take it?
 - b. Assume you have it now--what does it bring you?



Common Denominators

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Time Required: 15 Minutes

Procedure:

1. Pair up members who don't know each other well.
2. Search for traits they have in common that could make them *unique* among other team members; e.g., both can wiggle their ears, etc. (no negatives, e.g., never broke a leg).
3. Share with team.

Evaluation:

1. Did team members realize they had more in common than they would have thought? Even if they were of a different race, gender, or ability?

Identity Molecule

From *A World of Difference*.

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Time Required: 30 Minutes

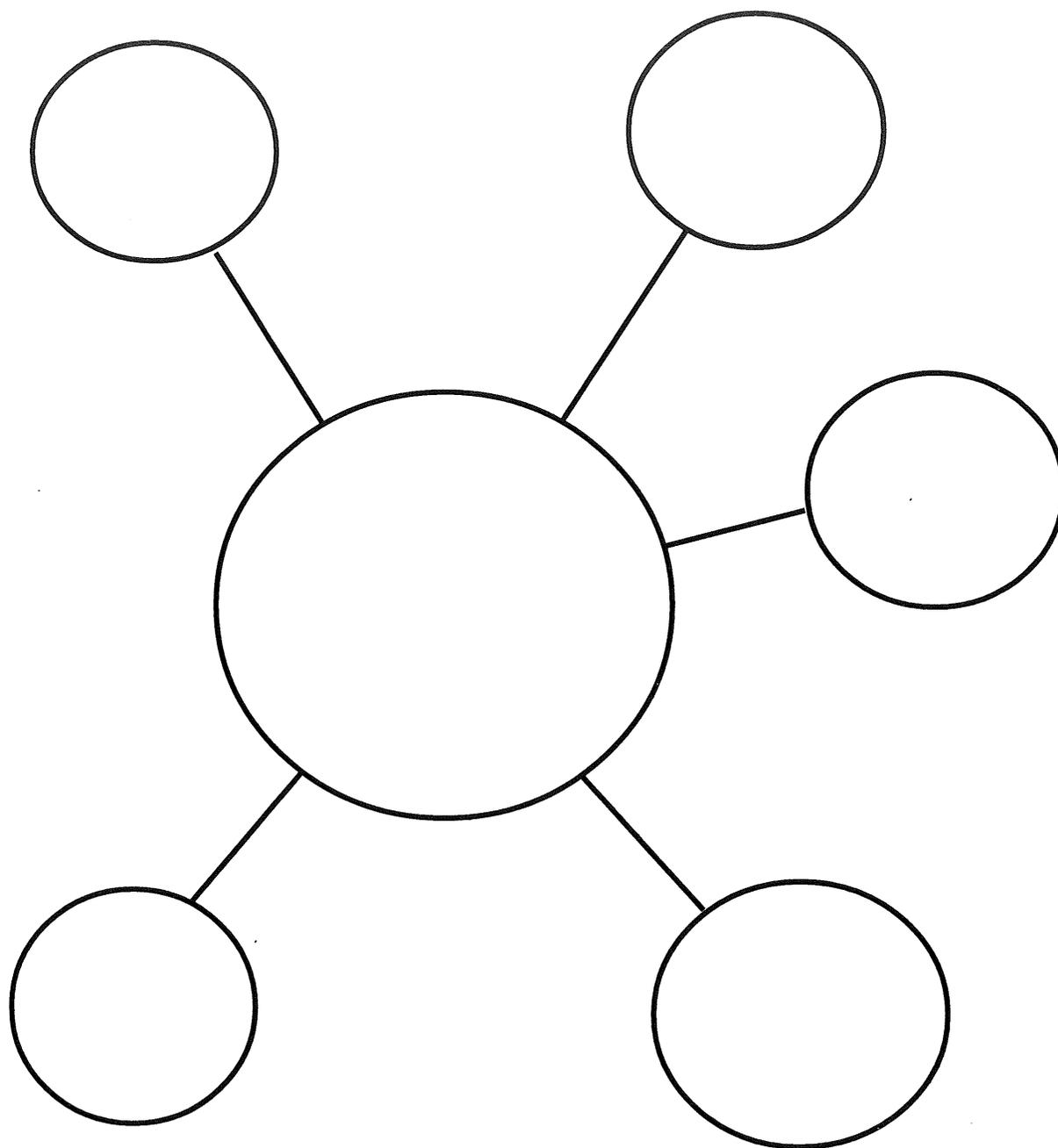
Resources Needed: Worksheet (see next page), pencil

Procedure:

1. Put your name in the center circle of the attached worksheet.
2. Think of five ways you are different from others.
3. Write one in each circle.
4. Select one of your differences to share with the team and be prepared to answer the following questions:
 - a. What do you get from this difference?
 - b. What might the team get from it?
 - c. How would you like people to relate to you regarding this difference?

Evaluation:

1. What was useful in this exercise?
2. What was difficult about doing this?
3. How did doing this exercise affect your team?
4. What did you learn about your team?



Identity Molecule

Organizational Principles Workshop

From *More Than 50 Ways to Build Team Consensus* by R. Bruce Williams. © 1993 by IRI/Skylight Training and Publishing. Adapted by permission of Skylight Training and Publishing Inc., Arlington Heights, IL.



Time Required: 1 Hour

Resources Needed: 5" x 8" Cards

Procedure:

1. Each person writes a list of principles for teamwork that she/he believes is important.
2. In groups of two or three, discuss and choose five or six, and write on 5" x 8" cards.
3. Each group selects its clearest principle, shares.
4. Each group organizes listed principles by some similarity or common theme, forming clusters.
5. Title clusters and share with other small groups.
6. Review the list of principles the team wants to function under.
7. Make available to members.

Evaluation:

1. How did this process work? Positives? Negatives?
2. Do you need to revisit this process from time to time?
3. What are some ways to keep these principles vital in group functioning?

Ground Rules Development

From *A World of Difference*.

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Time Required: One-half hour to one hour

Resources Needed: Paper & pencils

Procedure:

1. Each member writes a list of guidelines for conducting discussion which they feel would contribute to feeling safe to share and risk.
2. Hand out *Ground Rules* (see Supplemental Materials).
3. Share, discuss, and decide on some guiding principles for team functioning.
4. Give each member a copy of the final list and post during team meetings.

Evaluation:

1. How did having this discussion change your team interactions?

Positives?

Negatives?

2. Do you follow your rules?

All of the time

Some

Never

3. What else contributes to a sense of trust/safety in team functioning?

Checklist for Personal Values

Adapted from *The Fifth Discipline Fieldbook* by Peter Senge, Charlotte Roberts et al.
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Bryan J. Smith. Used by permission of Doubleday,
a division of Random House, Inc.



Time Required: One-half hour

Resources Needed: Checklist

Procedure:

1. From attached Values Checklist, select ten that are important to you as guides for how to behave, or as components of a valued way of life. Feel free to add your own.
2. Now, imagine you are only permitted five. Which five would you give up? Cross them off.
3. Number the remaining five in order of importance.
4. Look at your top three.
 - a. What do they mean exactly? What are you expecting of yourself?
 - b. How would your life be different if these values were prominent and practiced?
 - c. What would an organization be like that encouraged employees to live up to those values?
 - d. Are you willing to choose a life, and create an environment, in which those values are prominent?
5. Share with a partner or the team.

Values Checklist
For use with "Checklist for Personal Values"

- Achievement
- Advancement & Promotion
- Adventure
- Affection (love & caring)
- Arts
- Challenging Problems
- Change and Variety
- Close Relationships
- Community
- Competition
- Cooperation
- Country
- Creativity
- Decisiveness
- Democracy
- Ecological Awareness
- Economic Security
- Effectiveness
- Ethical Practice
- Excellence
- Excitement
- Expertise
- Fame
- Fast Living
- Fast-Paced Work
- Financial Gain
- Freedom
- Growth
- Having a Family
- Helping Others
- Helping Society
- Honesty
- Independence
- Influencing Others
- Inner Harmony
- Integrity
- Intellectual Status
- Involvement
- Job Tranquility
- Job Security
- Knowledge
- Leadership
- Location
- Loyalty
- Market Position
- Meaningful Work
- Merit
- Money
- Nature
- Being with People Who Are Open and Honest
- Order (tranquility, stability, conformity)
- Personal Development
- Living Up To the Fullest Use of Potential
- Physical Challenge
- Pleasure
- Power & Authority
- Privacy
- Public Service
- Purity
- Quality of What I Take Part In
- Quality Relationships
- Recognition
- Respect of Others
- Religion
- Reputation
- Responsibility / Accountability
- Security
- Serenity
- Sophistication
- Stability
- Status
- Supervising Others
- Time Freedom
- Truth
- Wealth
- Wisdom
- Work Under Pressure
- Work With Others
- Work Alone

Discovering Our Differences

Source: *Teaching for a Change*,
Civitas Associates, St. Louis, MO.
Provided by John Kibler.



Time Required: 15 minutes

Resources Needed: Attached BINGO card; pen or pencil

Procedure:

1. Distribute copies of the BINGO card to everyone.
2. Participants review their cards and formulate answers for each box based on their own characteristics, experiences, or values. Participants then move around the room interviewing and discovering people who are contrasting or opposing matches to themselves for each category.
3. When participants find a contrasting or opposing match, they ask the other person to write his/her name in the box.
4. The object is to make BINGO (5 across, 5 down, or 5 diagonally).
5. The same name may not be used twice.
6. Each participant is encouraged to make BINGO once or twice on his/her card.

Evaluation:

1. Did participants find that people they knew and liked had very different responses in the same boxes?
2. Are participants able to accept differences in responses?

Discovering Our Differences BINGO

Make BINGO (5 across, 5 down, of 5 diagonally) by interviewing and discovering people who are contrasting or opposing matches to you for each category. When you find a contrasting or opposing match, have the person write her or his name in the box. **You may not use anyone's name twice.**

Handedness	Ethnic background	Most important family gathering during the year	Country you would most like to visit	Home your family lives in
Most typical meal that your family eats	Eye color	Feeling about politics	Neighborhood you grew up in	Typical family or summer vacation
Favorite place to visit in the U.S.	An ethnic group you know very little about	City and state of birth	Favorite music	Favorite movie
Favorite TV program	Birth order in family	Most admired celebrity	Favorite outfit growing up	How you like to learn new things
Generation in this country	Generation in the community you live in now	Favorite book growing up	Time of day you are most productive	What you do to handle most conflicts

Ethnic Humor

From *A World of Difference*

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Time Required: 10 Minutes

Resources Needed: Ethnic Humor Rating Scale
(next page)

Procedure:

1. Read and circle appropriate indicator.
2. Share responses with team and discuss differences.
Note: In order to assure confidentiality, you may want to collect all completed scales and shuffle. Distribute scales and ask each person to read off the responses on the scale he/she has drawn. You may want to create a simple spreadsheet to show all responses, which will be anonymous at this point.
3. Discuss how differences in values might be handled respectfully during team work.

Evaluation:

1. How was this exercise useful?
2. In what ways did you grow, or broaden your view?
3. What outcome resulted from doing this exercise?

Ethnic Humor Rating Scale

Please read the following statements. Circle SA if you strongly agree with the statement, A if you partially agree, U if undecided, D if you disagree, and SD if you strongly disagree.

- | | | | | | |
|---|----|---|---|---|----|
| 1. It's okay to tell ethnic jokes. | SA | A | U | D | SD |
| 2. People who tell ethnic jokes are usually insensitive. | SA | A | U | D | SD |
| 3. It's okay for people to tell ethnic jokes about their own group. | SA | A | U | D | SD |
| 4. It is inappropriate to tell ethnic jokes in the workplace | SA | A | U | D | SD |
| 5. It is appropriate to tell ethnic jokes at home. | SA | A | U | D | SD |
| 6. People who are offended by ethnic jokes have no sense of humor. | SA | A | U | D | SD |
| 7. Ethnic jokes are not intended to hurt anyone's feelings. | SA | A | U | D | SD |

Grade Your Partner

From *Games Trainers Play*

The objective of this activity is to make participants aware of the experience of being evaluated by others, based on criteria that are largely unknown. The point is that evaluation cannot happen without criteria and clear targets, for adults or for students.

Time Required: Approximately 15 minutes

Resources Needed: Small pieces of paper; pen or pencils

Procedure:

1. Provide every participant with a slip of paper. Ask participants to work with a partner (in dyads).
2. Ask each person to observe his/her partner briefly and "grade" the partner on a scale from 0-100%.
3. Pass the slip of paper to the graded person to view.
4. Call for a quick report to determine the frequency distribution and range of reported "grades."

Reflection/Evaluation:

1. What feelings did you have when you were asked to grade someone else on this basis?
2. How did you feel when you knew you were going to be graded?
3. What was your first thought when you received your grade?
4. What possible ways would be better than this to evaluate



Evaluating the Environment

Source: *Creative Evaluation*, by Michael Quinn Patton. Copyright 1987 by Sage Publications. Used with permission.



Purpose: To think about what is needed to conduct an evaluation.

Time Required: 45 Minutes

Resources Needed: Paper for each participant; pens or pencils

Procedure:

1. Allow five minutes for participants to move around the room in order to explore the environment. They may touch or move things, but should not talk or leave the room. Ask them to observe what others do as well. Experience, explore, observe, evaluate.
2. Ask participants to find a comfortable space where they will write a short evaluation report, based on their own observations of what occurred.
3. Ask five people, on a voluntary basis, to read aloud what they've written.
4. Discussion based on reflection questions below.

Reflection/Evaluation:

1. What did you notice about the five evaluations of the same experience? Were they alike? Different?
2. What biases and prejudices may have affected each person's evaluation?
3. What would it take to produce a more focused set of observations and evaluations? (Think of goals, criteria, what is supposed to be observed, directions for observations, purpose, training, among other things.)

The Heart Meaning of Your Vision

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Time Required: 1 Hour

Resources Needed: Various

Procedure:

1. Each team member brings two or three articles or artifacts that relate to their hopes and vision and represent some aspect of them.
2. Each person can try to articulate the connection of their artifacts to their hopes, wishes, and vision.
3. Place the objects together.
4. Arrange and/or combine to create something new that incorporates or captures the essence of the collection.
5. Try to articulate the meaning at the heart of your vision.

Reflection/Evaluation:

1. How does this analogic way of communicating differ from a linear representation?
2. What was useful about attempting this exercise?
3. What was difficult about it?

Imagine

Time Required: 1 Hour +

Resources Needed: Paper & pencils

Procedure:

1. Imaginewaking up one day to find that racism, sexism, prejudice, and discrimination no longer exist in your system.
2. Write a front-page newspaper story or series of stories or features about the effects of this change on various groups or people in your system.
3. Make copies of each of the stories for each team member to read.
4. Identify common themes, hopes, and wishes.

Reflection/Evaluation:

1. How was the exercise helpful in learning each other's hopes and wishes for the project?



Hopes & Desires Conversation

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Time Required: 15 – 30 Minutes

Procedure:

Ask these questions of the team. Record answers.

1. What are some of the accomplishments of the past year or past few years of your target system?
2. What changes would you like to see in five years?
What would you like to see this system become?
3. What are we saying that is common to several of us?
4. Write a wish that encompasses the commonality.

Reflection/Evaluation:

1. Can the team name several accomplishments in the target system?
2. Is the team moving toward creating a new vision? Are members starting to agree with each other about that vision?



What If . . . ?

Source: *Warm Ups & Wind Downs*

Time Required: 20 Minutes

Resources Needed: Slips of paper with one "What if" statement on each.
Newsprint, markers

What if statements:

- What if . . . educational equity were a conscious part of every school committee meeting?
- What if . . . money grew on trees?
- What if . . . we decided it was our job to ensure that every student in our school experienced academic success?
- What if . . . the president of the U.S. was a 40-year-old woman?
- What if . . . there was no prejudice in our world?
- What if . . . you had to be 30 years old to eat pizza?
- What if . . . all people looked exactly alike?
- What if . . . there were no traffic lights?
- What if . . . every child had significant, caring, and capable adults in his/her life outside of school?

Procedure:

1. Distribute a slip with one "What if . . . ?" statement to each group member. Note: You may develop your own "What if. . . ?" statements if you prefer.
2. Assign a recorder.
3. Brainstorm ideas around "What If" statements (8-10 minutes).
4. Share ideas.

Evaluation:

1. Did everyone participate?
2. What different roles did people play?
3. Were all ideas written down or were they screened?
4. What did you discover about what you want for your school/system?



Developing a Common Language

From *A World of Difference*

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Time Required: 1 Hour

Resources Needed: Glossary of Definitions (Appendix)

Procedure:

1. Give each person a copy of the Glossary.
2. Look at definitions of the following words:
 - prejudice
 - stereotyping
 - discrimination
 - scapegoating
 - racism and sexism
 - diversity
3. One at a time, discuss the terms and their definitions. Share experiences you have had with concepts and relevant experiences you are aware of in your lives or your history.
4. Develop new or amended definitions, or adopt the definition as is.
5. Start a list of the team's agreed-upon words, adding words as they come up. Underline adopted words in the Glossary.

Reflection:

1. How is it helpful to know and agree on definitions of terms?
2. How will you use and add to your Glossary?

Selecting a Target System

Time Required: 1 Hour

Resources Needed: "Definition of a Target System" Handout
(See Supplemental Materials)

Procedure:

1. Based on a review of the "Definition of a Target System," in the Supplemental Materials, team members suggest a potential target system and fill out the "Potential Target System Worksheet" for each suggestion (next page).
2. List suggestions. Have each member explain his or her choice. No discussion.
3. Discuss and clarify any questions. Anyone may remove his/her own suggestions from the list.
4. Each member ranks the suggestions.
5. If there is agreement on the one selected the most, that is the end.
6. If there is not agreement, discuss and clarify the two most selected suggestions.
7. Members vote again.

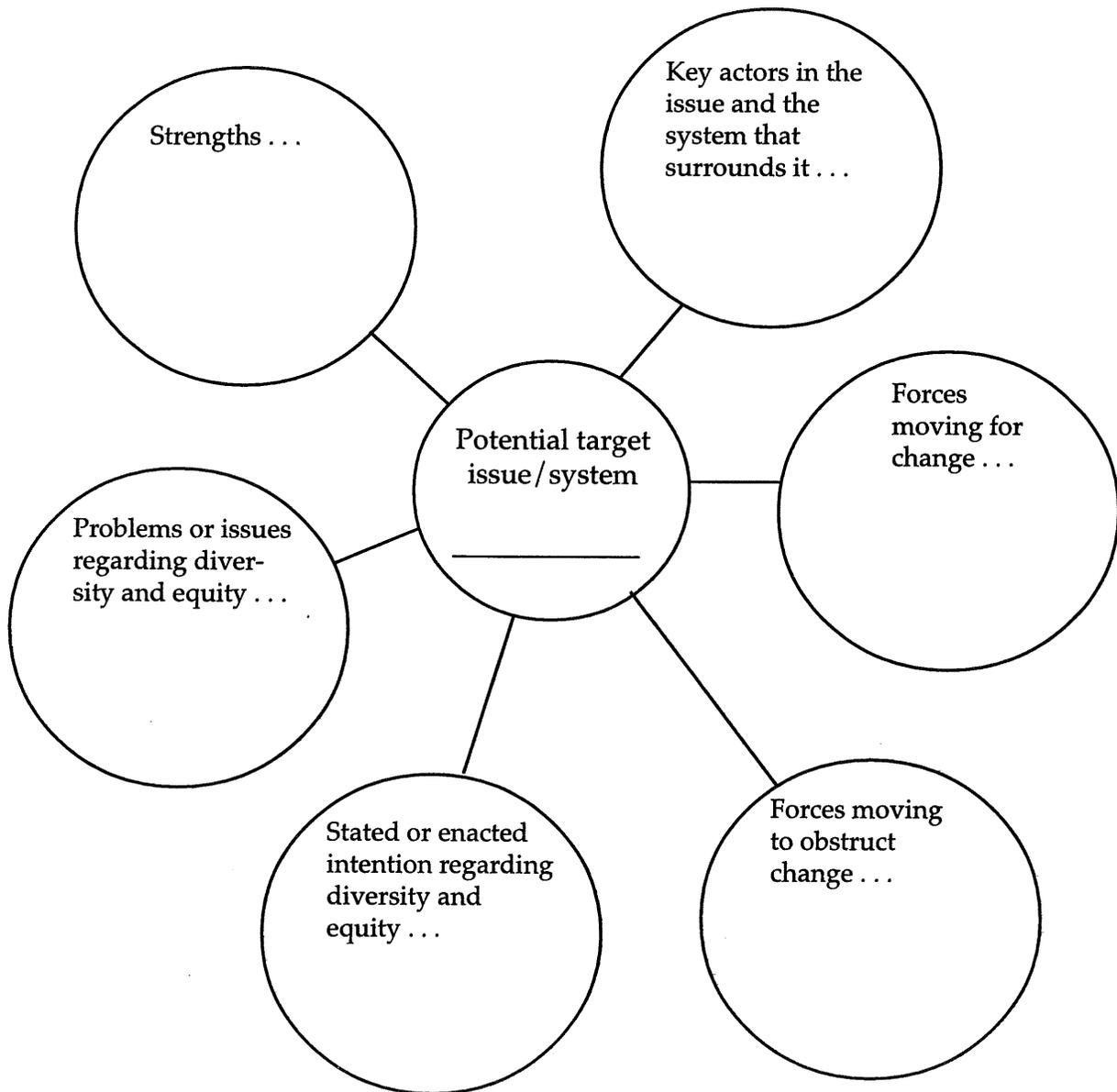
Reflection/Evaluation:

1. Has the team selected its focus?
2. How was this process helpful?



Potential Target System Worksheet

Directions. When team members have selected several potential targets for its work and the system that surrounds the target, complete responses to question or prompt in each circle.



Looking Back

The most successful shared visioning processes have the same goal for organizations: To develop a sense of destiny which the organization recognizes as its own, and help its members act accordingly. One compelling way to begin is by returning to the sense of purpose of the organization's original leaders. This does not mean turning back the clock; it means using the visions of the past to help energize today's vision process. No one would rebuild a seventeenth-century cathedral today, but even a modern church building may incorporate Gothic architectural references.

Senge et al., *The Fifth Discipline Fieldbook*, p. 341

Time Required: Twenty minutes to several hours

Resources Needed: Flip chart, pens; historical resources such as old yearbooks, board minutes, school charters

Procedure:

Step 1:

To recapture the sense of destiny of your organization or school, begin by asking these questions. You may decide to disband for a time and do some research, or you may know the answers off-hand. Discuss responses as a team. You may find that the work you are doing today is connected to a powerful current of underlying purpose.

1. What was the original vision and purpose of this organization?
2. What did it really mean? (E.g., if a school, did the original educational purpose apply to all young people of the region, or just a few?)
3. What did the original purpose and vision accomplish for us at the beginning? Define "us."





Step 2:

Now consider what changes affected that original sense of vision and purpose over time. As a team, ask yourselves:

1. Relative to its original purpose, what were the major milestones in the organization's life?
2. Has that sense of purpose changed?
3. If yes, when did that change take place?
4. What caused the change?
5. Was the change creative and generative (toward a purpose), or reactive (reacting to events), or even desperate?
6. What parts of the original sense of purpose have remained?
7. What parts of it should be regained?

Step 3:

Having this memory of the original purpose helps you consider how the purpose may still apply, and how it may not. Seeing where the organization veered from its purpose helps you keep from making the same mistakes again.

1. Does the earlier sense of purpose help us intuit a purpose for the organization today?
2. Does it fit with what the organization seems to exist to accomplish?
3. What current visions emerge in relation to this purpose?
4. Whom would this organization be serving under this vision?
5. In the future, how can the organization stay more closely aligned with its purpose?
6. What sorts of things should we look closely at next time?
7. What practices might we put in place to carry forward a sense of "institutional memory" about our purpose?

Vision of the Future

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In the following activity, we ask you to develop a shared vision of what your school or organization might be. This should be a broad vision of what you want, not a specific, targeted one. In Phase 3, we will narrow that vision to the target you choose, developing focussed goals and objectives.

Time Required: 1 Hour +

Resources needed: Flip charts and felt pens

Procedure:

Step 1: The Vision of the Future

It is five years from today's date and you have, marvelously enough, created the organization you most want to create. Now it is your job as a team to describe it—as if you were able to see it realistically around you. Consider these questions one by one, painting an ever-clearer shared vision of your organization.

Make sure each member of the team has an opportunity to comment on each of the questions. On a flip chart, note the main points that everyone in the group can see.

1. Who are the stakeholders in this organization we have created?
How do we work with them?
What benefits do they get from this organization?
2. What are the most influential trends in our field?
3. What is our image in the field? How do we compare?
4. What is our unique contribution to the world around us?
What is the impact of our work?



- 5. What does the organization look like?
• How do the important elements of the infrastructure interact?
- 6. How do we handle the good times? How do we handle the hard times?
- 7. In what ways is our organization a great place to work?
- 8. What are our values? How do people treat each other? How are people recognized?
- 9. What is our organization's role in the community?
- 10. How does our organization address people's/children's differences?
- 11. How do we honor cultural differences?

• *Step 2: Current Reality*

• *Now return to the current year and look at the organization as it is.*

- 12. What are the critical forces in our systems?
- 13. Who are the current stakeholders today -- inside and outside?
• What changes do we perceive taking place among our stakeholders?
- 14. What are the most influential trends in our field today?
- 15. What aspects of our organization empower people?
• What aspects of our organization disempower people?
- 16. How are our current policies regarding diversity and equity used?
- 17. What are our major fears about diversity and equity?
- 18. What do we know that we need to know?
• What don't we know that we need to know?

• *Step 3: Writing a Vision Statement*

- 1. Make a list of the key elements or themes that were recurrent in the answers people gave to the questions above.
- 2. Ask each team member to write a brief summary of the shared vision, using the answers above and addressing these areas:
 - constituents
 - policies and procedures
 - purpose/goals
 - authority
 - structure
 - information flow
 - values
 - allocation of resources

Backing Into Goals

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Purposes: To generate enthusiasm for the work ahead
To delineate specific goals, tasks and commitments

Time: 1 Hour +

Resources Needed: Flip chart, markers, Post-it notes

Procedure:

Ask each team member to answer the following questions:

1. Have you ever been part of a really great team? Define "a really great team" any way you like. It should be a team in which you felt personally committed, where you signed up "body and soul," and where the team achieved extraordinary results. It could have been in athletics, debate, doing a project, scouts, whatever. *Think back to that experience.*
2. What was good about that team? People do "good" work all the time. Talk about what felt special about being on that "really great" team. Some people have noted "I felt powerful." "I felt excited." "I believed in what we were doing." "We all had to pull together." "I made a difference." "I felt like I owned it." "I had a lot of passion for it." "There was a clear challenge."
Write all the significant comments on the flip chart in front of the group. Post each page on the wall. Also note details of the "great team" that people mention.
3. How can we, as a team, create those feelings here, in this effort? What could we do (accomplish, achieve, create together) that would rekindle the same feelings we remember



from those really great teams? Brainstorm ideas, trying to find and express goals that would be an outgrowth of the team vision and that would fit for everyone. *Write them on the flip chart.*

4. To what would/could we commit ourselves? You may reach this point in one session, or it may take another to finish. When you reach this stage, the group as a whole commits itself to working on the team, including individual commitments for parts of the task, when they are decided. At this point, you have a shared commitment to functioning that will contribute to your team vision, which ought to include critical elements of your personal vision.

Linking Worksheet

For Use Between Phases 1 and 2

This worksheet is designed to assist you in summarizing the key work from Phase 1 and prepare you for the work of Phase 2. The first three columns relate to activities you have already completed. The last column asks you to think about what is coming in the next phase; these tasks will be clarified as you move into the next phase.

Greatest Opportunities What are the strengths of the system? How will these strengths provide opportunity for positive change?	Disparities What disparities create the greatest challenges to realizing the vision or facilitating positive change?	Diversity and Equity Issues Make a list of the equity and diversity issues that may come up as you work on your target project.	Phase 2 Task Make a list of the tasks you anticipate you must finish or begin in the next phase.

