Reflections

The SoL North America Journal
on Knowledge, Learning, and Change

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SoL
society for organizational learning
NORTH AMERICA

From the Editors

Reflections was launched in 1998 in response to a deep desire within the SoL community for a forum where the three constituent communities of researchers, consultants, and practicing managers could engage in ongoing conversation. In his note in the first issue, founding editor Edgar Schein stated:

> "We start with the assumption that each of these communities has important insights into how organizations can be improved and how our global environment can be better sustained, but we are highly aware of how difficult it is to communicate across the cultural boundaries that grow up in each of these communities. It is my hope that *Reflections: The SoL Journal* can contribute in a meaningful way to the creation of a genuine dialogue that will stimulate the creation, dissemination, and utilization of knowledge and skill in all of these communities."

Over the course of 18 years, *Reflections* has built a knowledge base of organizational learning theory and practice that spans from practical case studies from around the world to bold, new ideas about the nature of organizations themselves. Through these pages, as members, you have not just shared your success stories but have openly and sometimes painfully reflected on where you have stumbled and why. Your refusal to fall prey to the lure of complacency and your dedication to continuing to experiment, challenge yourselves, and "fail forward" is a hallmark of this community.

As you will read in the note from the SoL NA Council, it is with this spirit of continual experimentation and evolution that the SoL NA Council has decided to suspend the production of *Reflections* and explore alternative ways to achieve its goals.

We would like to thank the many authors who have generously shared your stories, work, and insights over the years. We also want to extend our appreciation to Frank Schneider for his long-time partnership. Finally, we are grateful to SoL members everywhere. Your willingness to engage with today's most challenging and intransigent problems gives us hope for healthier organizations and a healthier planet.

— *Janice Molloy and Deborah Wallace*

From the SoL NA Council

The Council of SoL North America would like to recognize all those who have contributed to *Reflections* over the years. In particular, we would like to acknowledge the dedication and exceptional work of Managing Editor Janice Molloy, Contributing Editor Deborah Wallace, and Graphic Designer David Gerratt.

For almost two decades, *Reflections* has connected readers around the world who are aware that there is no power greater than a community acting together to improve the areas they care about most. Your stories have educated us, inspired us, and at times, frustrated us, all in name of challenging us to be active learners by examining what is possible now.

As our subscribers' needs have changed over time, so have the possibilities within the publishing industry. The SoL North America Council has made the difficult decision that this is the right time to discontinue publication of *Reflections* and to enter into our own reflection on how we can best serve our members. In the coming months, we will ask for your participation in this process by sharing your ideas and suggestions on how to create a powerful platform for sharing relevant content. We are confident that together we will emerge with a strong, relevant publication that will support the aspirations of all our subscribers.

Competencies Not Credentials: Reimagining Education in the U.S.
Tony Wagner and Janice Molloy

Much of the current educational reform movement focuses on the role of schools in helping students become "career-ready." But according to author and educator Tony Wagner, unless we overhaul schools' mission and approach, we'll continue to prepare students for the jobs of the past rather than provide them with the skills to succeed in the future. In this interview, Tony discusses why he believes the ability to innovate is today's most essential workplace skill and how teachers and parents can support children in developing the creative problem-solving abilities required by today's most forward-thinking employers.

Teach, Lead, Change: Educational Change That Works for All
Andy Hargreaves and Deborah Wallace

From year to year, education reform remains at the top of the U.S. political agenda. The recently passed Every Student Succeeds Act is just the latest attempt to improve educational outcomes. But according to educational researcher and writer Andy Hargreaves, such interventions are bound to fall short of expectations unless they include a strong investment in the teaching profession, a concerted strategy to develop local leadership, and effective collaboration that spreads responsibility for all students' success across a community or region. In this interview, Andy discusses his research on how educational reform can have the desired impact.

Finding Connectivity: Narrowing Gaps to Discover New Possibilities
Charles Holmes and Deborah Wallace

In this interview, convener, teacher, and consultant Charles Holmes reflects on his lifelong work of connecting people with ideas and possibilities to help them innovate, collaborate, and create. Charles fosters profound dialogue around desired futures, leading to deep levels of engagement, connectivity, and mobilization for small groups, organizations, and whole communities. His work has also taken him on a personal journey of self-discovery, where he has learned which internal mechanisms allow him to be fully present and focused on the group at hand and which ones keep him from achieving that state.

Mapping as Engagement: Systems Mapping for Systemic Change
Joe Hsueh and Janice Molloy

As one of the founders of the Academy for Systemic Change, Joe Hsueh is on the leading edge of applying system dynamics to enabling and sustaining large-scale change processes. *Reflections* interviewed Joe to learn about his evolution from public policy advisor to volunteer at a Buddhist monastery to MIT-trained system dynamicist. The common thread that weaves together Joe's richly diverse career is a commitment to partnering with others to make progress on challenging issues, ranging from personal health crises to global problems. At the center of Joe's approach is a sense of love and compassion that allows stakeholders to bring their best selves to the change processes they are involved in.

BOOK EXCERPT
Leading with Shakti: Leveraging Feminine and Masculine Energies
Nilima Bhat and Raj Sisodia

Given the prevalence of serious problems in the world, the case can be made that today's hierarchical and individualistic leadership models aren't working the way we need them to. In *Shakti Leadership: Embracing Feminine and Masculine Power in Business* (Berrett-Koehler, 2016), Nilima Bhat and Raj Sisodia introduce what they call "Shakti Leadership," a way of leading that is generative, cooperative, creative, inclusive, and empathetic. While these are traditionally regarded as "feminine" qualities, we all have them. In this chapter, Bhat and Sisodia introduce the three essential capacities of Shakti Leadership: wholeness, flexibility, and congruence.

Competencies Not Credentials
Reimagining Education in the U.S.

TONY WAGNER AND JANICE MOLLOY

Much of the current educational reform movement focuses on the role of schools in helping students become "career-ready." But according to author and educator Tony Wagner, unless we overhaul schools' mission and approach, we'll continue to prepare students for the jobs of the past rather than provide them with the skills to succeed in the future. In this interview, Tony discusses why he believes the ability to innovate is today's most essential workplace skill and how teachers and parents can support children in developing the creative problem-solving abilities required by today's most forward-thinking employers.

Tony Wagner

Janice Molloy

JANICE MOLLOY: What drew you to become an educator?

TONY WAGNER: I hated school, very simply. I hated it not just occasionally, but all the time, in every grade from a very young age. I actually dropped out of college twice, first to write the great American novel and then to work in the civil rights and anti-war movement.

At a certain point, I began reading about education. I read Paul Goodman's *Growing Up Absurd* and *Summerhill* by A.S. Neill, and I suddenly realized that I wasn't crazy, that there were other ways of thinking about education. This realization led me to seek out a small, experimental Quaker college and gave me a sense of what I wanted to explore.

I became a high school English teacher with the idea of trying to find a different approach to education and bring my own kind of 1960s ideals to education. I was interested in thinking differently about both what and how we teach.

Out-of-the-Box Teachers

MOLLOY: Were there any teachers who supported you along the way?

WAGNER: Absolutely. I went to a kind of last-chance boarding school, because I'd been such a bad student in high school. I was very interested in writing at the time, so I approached an English teacher at the school, a lovely English gentleman who was not my regular teacher, and I said, "Will you teach me to write?" He said, "Oh, I'd be delighted."

He gave me an assignment to explore a different genre each week. So one week might be a childhood reminiscence, another week might be a dialogue, and yet another week might be a movie or restaurant

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review. I'd meet with him, and he'd go through what I had written and comment here and there on things he thought were well done and then make one or two suggestions.

Here was a guy taking me seriously. That experience profoundly influenced me, both as a writer and later as a teacher of writing. When I became a high school English teacher, I used the conferencing method instead of the red pen method. I also used the writers' workshop approach in the classroom, where kids read their work aloud and produced work based on their experiences for real audiences.

Kids always produced extraordinary results. In fact, one of the students whom I taught went on to be a highly successful, well-known poet, Elizabeth Alexander. I can't take any credit for her work, but I do remember her vividly as a student.

In the 1980s, it became clear that the economy was changing profoundly. I began to wonder, "How do we think about preparing kids in different ways?"

A Radically Different Economy

MOLLOY: How did you become interested in educational reform?

WAGNER: As a master's student, I became interested in the interrelationship between the economy and education. I read some early Marx. I did a paper on the evolution of education, going from blue-collar education to white-collar education to what I then called "no-collar education." I wrote that paper in 1971, and in some sense, it laid out the kind of domains that I still remain interested in.

In the 1980s, I read books like *Winning the Brain Race* by David Kearns and Denis Doyle. It became more and more clear to me that the economy was changing profoundly. I began to wonder, "What

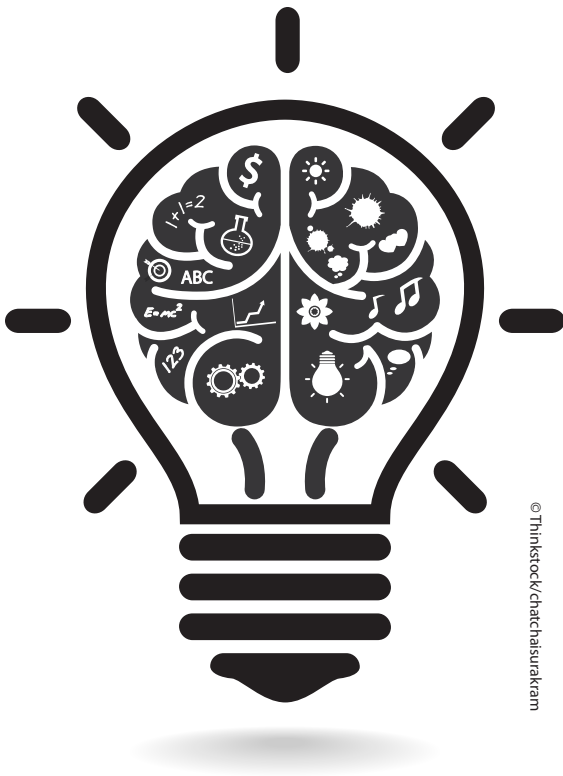does that mean for education? How do we think about preparing kids in different ways?"

The real milestone for me was reading Thomas Friedman's book *The World Is Flat* in 2005. That's when the lightbulb went off, and I suddenly realized, "Oh, my gosh. We have a radically different economy. And we have a radically challenged society, in terms of sustainability and human rights and so on. How do we prepare kids for work, for learning, and for citizenship in a flat world?"

That thought process led me to research and write *The Global Achievement Gap: Why Even Our Best Schools Don't Teach the New Survival Skills Our Children Need—and What We Can Do About It* (Basic Books, Updated Edition, 2014). I interviewed a wide variety of employers and identified seven "survival skills" kids need to thrive in the new world of work (see "Seven Survival Skills"). I juxtaposed those skills with what I was seeing in classrooms every day, which was essentially test prep.

I continued to talk to business leaders about this topic and came to realize that we're transitioning from a knowledge economy to an innovation era. Knowledge has become a commodity. It's free. It's like air. It's like water. It's growing constantly, exponentially. It's available on any Internet-connected device.

Seven Survival Skills

Critical thinking and problem solving

Collaboration

Agility

Initiative and entrepreneurship

Effective communication

Ability to access information

Curiosity and imagination

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There's no longer a competitive advantage in knowing more than the person next to you, because that person will just Google it.

Knowledge used to be scarce, so if you wanted it, the only place you could go was to a teacher or a school or a library. Now, we have a knowledge glut. There's no longer a competitive advantage in knowing more than the person next to you, because that person will just Google it.

Two Kinds of Innovation

MOLLOY: What did you learn about nurturing innovation in schools?

WAGNER: To learn more about the roots of innovation, I interviewed young people in their twenties, all of whom were highly creative problem solvers, some in high tech, some in the arts, some social entrepreneurs. I wanted to understand how they got that way and what the most important influences in their lives were. (For details of this work, see *Creating Innovators: The Making of Young People Who Will Change The World*, Scribner, 2012.)

I also interviewed their parents. The first thing I discovered was that a number of them had gone to prestigious schools like Harvard, Stanford, MIT,

and Carnegie Mellon, but they all told me they'd become innovators *in spite of* their schooling not *because of* it. They could also name at least one teacher who had made a significant difference in their lives, much like my English teacher friend.

I then interviewed those teachers and discovered that every one of them was an outlier. They taught in ways that were fundamentally different from their peers yet remarkably similar to one another. I came to understand that, in fact, we can help kids develop creative problem-solving skills, which is one definition of innovation.

There are two kinds of innovation. There's innovation that brings new possibilities to life. That's comparatively rare; it's a matter of nature, time, and talent coming together in a special mix. I think Steve Jobs was in that category.

The second kind of innovation is the capacity to solve problems creatively. We are born curious, creative, and imaginative; that is in the human DNA. And so, the question is, what happens to that capability? It's schooled or parented out of most of us at a pretty young age.

I tried to understand what teachers and parents must do differently to *not* have that happen and to support children in continuing to develop those capabilities. What I ultimately found is that, whether from privilege or poverty, the young innovators I interviewed had one thing in common: Their parents or teachers had encouraged intrinsic motivation through play, passion, and purpose.

And so, in a sense, it came full circle for me, because I always thought that learning ought to be active

and engaging. Learning ought to have an element of play. Learning ought to have an element of being able to pursue your real interests.

In the end, I found validation for some of my views on learning in the context of better preparing kids to thrive in the innovation era. I'm not just talking about high tech or STEM (Science, Technology, Engineering, and Math). We need creative problem solvers in every domain, whether it's for-profits, nonprofits, startups, Third World, and so on. To me, creative problem solving is the most important quality and competitive advantage any young person can have.

The thing that's so exciting is that having a sense of purpose leads to opportunities to make a difference. The young people I interviewed had a real sense of purpose and wanted to apply their creative problem-solving capability to work that needed doing.

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Need to Rethink Education

MOLLOY: Is there a way to institutionalize this kind of process in our schools?

WAGNER: Our educational system was born at the dawn of the industrial era. In 1893, the Committee of Ten, headed by then Harvard President Charles Eliot, decreed what was to become our high school curriculum. They invented the Carnegie Units—the amount of time that teachers spend teaching specific academic content in a school year—and decided that kids would take the sequence of courses they still do today.

For the last 20-odd years, most of my other work has been on change leadership in education.

I founded the Change Leadership Group at the Harvard School of Education and co-directed it for a decade. For many years, I have consulted widely to school districts and foundations. One of the things I discovered is that educators are often told to change without any understanding of why. So the first challenge in the change process is understanding the fundamental shifts in our society and economy, and the ways in which they demand that we rethink education.

The change process needs to begin with communities, states, and our country having a conversation about how the world has changed and what the most important outcomes we need from our schools are. What do kids need to thrive today? How is it different than what they needed 125 years ago?

Once we've established different outcomes, the next step is for states to develop accountability systems aligned with those outcomes. Right now, we have systems that are 20th-century solutions to 21st-century problems. We test things that for the most part don't really matter. The new tests are a little better, but they're still high stakes. They're summative more than they are formative. They are not testing many of the other qualities that we know are important, because a computer-scored test cannot measure things like grit, perseverance, tenacity, creative problem solving, collaboration, and effective communication. We need to bring collective human judgment, informed by evidence, back into the accountability system.

As I outline in the book I wrote with Ted Dintersmith, *Most Likely to Succeed: Preparing Our Kids for the Innovation Era* (Scribner, 2015), we can begin to rethink "educational R&D" by establishing model schools that are laboratories for new approaches. These schools attract teachers who are early adopters, who want to try different things in different kinds of school settings, which can then become places where we train other teachers. To me, that's the sequence of the educational change process, and fortunately, there are several networks that support this kind of educational

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R&D, including the Hewlett Foundation-funded Deeper Learning Network, Edleader 21, and, of course, SoL.

Hopelessly Obsolete

MOLLOY: What are some of the impediments to educational reform?

WAGNER: In education right now, we are only assessing content knowledge and not even doing that very well. We're not assessing many of the most important skills, and we're not assessing or teaching for motivation. Our industrial age education system is failing some kids, but the larger problem is that it's hopelessly obsolete. It doesn't need reforming. It doesn't need incremental improvement. It needs reimagining and reinventing. Once we do that, then we can begin to rethink teacher education.

It fascinates me that Google used to only hire kids from Ivy League schools. Come to discover that the indices they've long used for hiring are worthless, according Laszlo Bock, senior vice president of People Operations. What do they do now? They use structured interviews in the hiring process. They don't ask for a college transcript, because they don't think the transcript tells them anything

of value, and 15 percent of their new hires don't have bachelor's degrees at all. If you go to the Google job application website, the word "college" doesn't even appear.

The point is that Google has come to understand that we have to move away from artificial credentials and toward assessment of genuine competencies. I'm thinking that as Google goes, so must go the world. In education, we need to understand that it's not merely about acquiring and retaining knowledge; there are other things more important than content knowledge. Here's my little aphorism: Content knowledge matters. Skills matter more. Motivation matters most. Because if someone is intrinsically motivated, they're going to continuously acquire new content knowledge and skills.

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Two Different Paths

MOLLOY: We tend to admire the countries that have the highest test scores. Are any of those countries focusing on the skills required for innovation?

WAGNER: Well, it's a fascinating story. Thirty-five years ago, Finland was an under-performing, predominantly agrarian economy with a stunningly mediocre education system. The nation's leaders developed a bipartisan consensus to completely rethink their education system to prepare for the new era, because their agrarian economy was not sustainable. They were cutting down trees as fast as they could.

To make a long story short, unlike the U.S., the first thing they did was focus on completely restructuring the preparation of teachers. They closed down 80 percent of their education schools and left open only the eight that were associated with their best universities. They required every teacher to earn a real master's degree—not one of those mail-order degrees that many of our teachers seem to get—that included a year-long apprenticeship with a master teacher.

The Finns reviewed all of the best research on what good teaching looks like and borrowed heavily from Americans like John Dewey. In this way, they created a state-of-the-art educational system that has been ranked among the best in the world by international tests like the Programme for International Student Assessment (PISA).

But here's the thing that's so fascinating: Finnish students start school one year later. They have a shorter school day than American students. They have a shorter school year. A third of their courses in high school are electives. They take their first exam, the National Matriculation Exam, as high school seniors. They can take two, three, or four years to prepare for it. If the results aren't good, they take it over. And they have a choice of the subjects in which they're tested, except for the native language, which is required.

Finally, the Finns have a system where students choose between an academic track and a career technical-vocational track, which are equally rigorous. Both lead to post-secondary education, which is free.

Why is there a shorter school day? Because Finns believe that much of the best learning goes on in clubs, whether it's yearbook or newspaper or computing club or whatever. They deliberately have a shorter school day so the kids can be more active in clubs. There are no school-sponsored sports; they're sponsored by the municipalities. So, the Finns are very clear about what school is and isn't for. And they're getting extraordinarily high test scores, because kids don't just memorize material; they really understand concepts. They're able to think and reason.

That's one model. Now, contrast that system with Asian powerhouses Singapore and South Korea and Shanghai in China. These countries have all recently outperformed Finland in terms of test scores, but you go to these places, and you discover that students live for only one thing: high-stakes tests, which they are required to take every few years and which determine their entire futures.

Kids in these countries are going to school 10 hours a day, then they're going to private tutorials for another three to four hours a day. They're sleeping an average of five hours a night. They're miserable. I did a focus group with some 18-year-old students in Taiwan, and they had no idea what they were interested in. They had no clue, because they'd never had an opportunity to explore an interest. Everything was required.

So, there are two radically different paths to high performance, and the question is, which one are we going to choose in the U.S.?

Five Contradictions

MOLLOY: What challenges do organizations face in getting the workforce they need right now?

WAGNER: Everywhere I go, business leaders ask the same question: How do we help develop the capacity for innovation? I go through what I call the "Five Contradictions"—the contradictions between the current focus of schools and beaucratic institutions versus the focus needed to create a culture of innovation (see "Five Contradictions").

First, institutions and schools measure individual achievement. The problem is that innovation is a team sport.

Second, schools and bureaucratic institutions compartmentalize. What we know about innovation is that it happens at the boundaries of departments and disciplines, and almost never within them.

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Third, schools and bureaucratic institutions favor obedience and hierarchical structures. Well, we know that innovation is radically disruptive and that you have to learn to question authority and understand that those at the top are not necessarily the ones who know the most. I interviewed Brad Anderson, the former CEO of Best Buy, and asked what he saw as the biggest obstacle to innovation. He said, "My senior managers, because they think they are senior managers because they're smarter than anybody else and so they don't listen. It's actually the people at the bottom who frequently have the information we need to innovate."

The last two contradictions, I think, are the most challenging. The fourth contradiction is all about

TABLE 1 **Five Contradictions**

Current Culture	Innovative Culture
Individual accomplishments	Teamwork
Specialists	Multiple-discipline perspective
Obedience and hierarchy	Radical disruption and questioning of authority
Risk aversion	Risk taking
Extrinsic motivation	Intrinsic motivation

the "F word": failure. The fear of failure creates risk aversion and a sense of compliance. That's death for innovation, because innovation demands that you fail early, fail often, fail fast, fail forward, fail cheap, but fail.

We're really talking about iteration, which is my new favorite word and the word I think should replace the F word, certainly in schools. Innovation and real learning demand trial and error. Over and over, I ask audiences, "How many of you learned more from your mistakes than from your successes?" Every hand goes up. So, in bureaucratic institutions and schools, we have to rethink the F word and encourage responsible risk taking.

And finally, the fifth contradiction involves the issue of motivation. Bureaucratic institutions and schools rely heavily on extrinsic incentives to motivate: carrots and sticks, money, grades, whatever. But what I've discovered among the millennials is that many of them are far, far more intrinsically motivated. They want to make a difference more than they want to make a lot of money; they want to do work in school because it's interesting and not just for the grade.

It's not an accident that the contradictions I've just described apply equally to conventional, bureaucratic entities as well as to schools. We have created schools to prepare kids for those bureau-cratic entities. If we want to change these institu-tions and schools, we have to change their cultures.

Business as a Driver of Reform

MOLLOY: Does business need to drive educational reform?

WAGNER: People think that we got the first tsunami of educational reform from policymakers, but that's not true. It actually came from business leaders like David Kearns, who was head of Xerox in the 1980s, and Lou Gerstner, who was head of IBM. In fact, in 1996, Lou Gerstner called for a national summit on education. Many CEOs came, and as a result, governors and policymakers had to come. That kind of business leadership led to the first wave of educational reform and to the

standards movement, which became the No Child Left Behind movement.

I have the conviction that business leaders in Silicon Valley and in other pockets of innovation know that the education system is broken. It would make a tremendous difference if some of those people, like Jeff Bezos or Sergy Brin and Larry Page, co-founders of Google, were to step forward in some united fashion, for example, by taking out a full-page ad in *The New York Times* and *The Wall Street Journal* saying that our schools are not merely failing, they're obsolete. We don't need incrementally better schools. We need fundamentally different schools. These guys know this. Sal Khan started his own school on completely different principles, and all the Silicon Valley folks are lining up to get their kids into this little school.

Interestingly, Jimmy Wales, who started Wikipedia, Brin, Page, and Bezos all have one thing in com-

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mon: They went to Montessori schools and credit the Montessori experience for helping them become independent, self-motivated learners.

My urgent appeal is for business leaders to start talking about the outcomes that matter most for our kids, for our economy, for our future. We need to get off this kick that a few charter schools and more testing are going to solve our educational problem. Both have been proven wrong. I'm not opposed to charter schools, but they are not a panacea. In the education environment, the market incentive does not work to make improvements. ∎

RESOURCES

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Most Likely to Succeed Video

ABOUT THE AUTHORS

Tony Wagner currently serves as an Expert in Residence at Harvard University's Innovation Lab. For more than a decade, he was the co-director of the Change Leadership Group at the Harvard Graduate School of Education. A documentary based on Tony's latest book, *Most Likely to Succeed: Preparing Our Kids for the Innovation Era* (co-authored by Ted Dintersmith), had its world premiere at the 2015 Sundance Film Festival. For more information about Tony and his work, go to *tonywagner.com*.

Janice Molloy is managing editor of *Reflections*. *janice@solonline.org*

Commentary

RICHARD OWENS

With our industrial-age approach to schooling outdated and often floundering amid the rapid changes brought about by economic globalization, advancing technology, and cultural collision, many leaders acknowledge the need for a radical change. Strong support for a profound makeover comes from the business sector, with corporate CEOs seeing the development of a workforce with a combination of technical, creative, and intercultural expertise as the key to unlocking future innovation in their companies. In response to these powerful calls, schools now face the complex task of supporting students in achieving strong outcomes in traditional discipline areas, while also developing the personal, cognitive, and interpersonal skills that will help them adapt successfully to the challenges of this century. Unfortunately, for many educators, the optimism associated with this emerging vision is often swamped by an accompanying feeling of helplessness at the daunting scope of the systemic change that is required.

Richard Owens

In his interview, Tony Wagner provides deep insight into the current reality of our schools and school systems, highlighting their common weaknesses and dissecting the fundamental failings of a contemporary obsession with high-stakes testing and teacher accountability. Importantly, he also provides inspiration for the process of reimagining our schools as innovative environments where skillful collaboration is rewarded, agile creativity is fostered, and experimental mindsets are nurtured. Part of the challenge for educators, however, is that there is no quick fix. While business leaders can do more to become key partners in this change process, a simplistic belief in the power of market forces alone will not bring about the seismic shifts that are required for significant change in our school systems. So, how do we best set about developing teachers, leaders, schools, and school systems for the future we want in education?

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Education R&D

For educational leaders, the answer begins with starting locally and directing attention to the systems, structures, and processes that rest within their sphere of influence. Wagner draws attention to the many transformational possibilities that exist for schools through the development of new pedagogies, the restructuring of organizational routines, the cultivation of team learning, and the embrace of continuing professional inquiry. These disciplines offer teachers and school administrators both hope and a hands-on focus for their collective efforts.

So, what might this practical work of transforming education look like? From someone who has spent the last decade leading "education R&D" across schools, regional networks, and the international sector, here are some promising examples from the field.

Adopting an Inquiry-Centered Approach to Professional Practice

One large K-12 school tackled the challenge of nurturing a radically disruptive culture by making ongoing collaborative inquiry a core expectation of its staff. The decision to embrace this experimental approach was driven by a practical realization from administrators that their dependence on hierarchical leadership structures, fixed organizational routines, and executive decision making was stifling change.

The key driver for innovation at the school is its Teacher Inquiry Group (TIG) Program, a dynamic R&D project focused on professional and organizational learning that is now entering its sixth year. Every teacher and administrator in the school works in a Teacher Inquiry Group over the course of a semester. Drawing upon theory and methods from the field of action learning, their collaboration is centered around cycles of planning, experimentation, data analysis, reflection, and adaptation. The school's strong commitment to this initiative is evident in the way it includes the evaluation of performance in relation to innovation and collaboration within its staff appraisal system.

The main focus for collaborative inquiry at the school is the development of 21st-century competencies, with educators investigating areas such as digital literacy, knowledge building and sharing, problem solving, collaboration, critical thinking, and creativity. An overarching interest in the program is the way adult and student learning in these areas is interwoven and interdependent, with the spirit of innovation that develops in the classroom being reflected in the culture of the staff room. Elements of choice are built into the program, with teachers able to shape their personal focus within the broader direction of the school's strategic plan. Group leaders are drawn from a pool of volunteers who, in return, receive extensive training in facilitation and action research. Each year, one or more of the groups conducts research into the efficacy and impact of the program itself, with the school continually fine tuning key elements as a result of its findings.

If we wish to create dynamic and innovative learning environments for students, then we must create the same types of workplaces for teachers and leaders.

At the center of the TIG approach is the simple but critically important recognition that teachers are the most significant change agents in our efforts to reimagine schools. The program acknowledges teachers as both the subjects and objects of change, and commits to experimentation and growth as being essential for effective professional practice. Over time, senior leaders' focus has also evolved, with administrators now adopting new roles as facilitators, designers, and stewards within their leadership work. As Wagner suggests, if we wish to create dynamic and innovative learning environments for students, then we must simulteanously create the same types of workplaces for our teachers and leaders.

Building Capacity for Innovative Leadership at a Regional Level

One large international school network has approached the challenge of developing an innovative workforce through an explicit focus on building leadership capacity in relation to creative problem solving, team learning, change management, and systems thinking. The Leading Teacher Teams program is currently running in three countries and helps mid-level leaders learn how to facilitate powerful inquiry with their teams, while incorporating evidence-informed strategies for improvement. The program emerged from a series of executive network meetings that examined the challenges facing leadership teams in schools. Critically, the program moves beyond simply recognizing the training gap that commonly exists for teachers as they transition into leadership roles, and begins to directly address the question of how we can support the next generation of educators to lead effective change.

At the heart of the program is a research project that asks participants to apply their learning by leading an innovative initiative at their schools. The focus for the individual projects evolves through a series of systems thinking workshops, with attention directed to finding leverage points for driving deep and sustainable change, rather than simply addressing the highly visible but symptomatic issues that can dominate everyday work. The slow build of the research projects over the course of a year helps to broaden and deepen participants' understanding of their work as leaders; to continually challenge their thinking and practice; and to provide time for the development of team learning. While the timeline for the impact of the projects is long, it reflects the realities of successfully leading change in schools. Graduating cohorts have reported strong outcomes from their efforts.

While embedded in the practical work of improving school leadership, some of the wider aspirations for the program are firmly focused on network development. Its online forums and assignments work to transcend geographical boundaries, helping participants build their knowledge and support networks, while promoting the types of technical and global capabilities essential for regional leadership. Similarly, the professional

projects help to drive innovation in individual schools, at the same time producing valuable case studies that can be examined in terms of how findings might be transferred and adapted to different contexts and settings. With the program now looking toward its third cohort, one of its most significant outcomes to date is the development of a critical mass of current and emerging leaders with a shared vision, shared language, and theoretical framework for leading innovation across the region.

Developing Systems Thinkers in Schools

On a more intimate scale, one rural school has taken a long view of society's need to develop creative problem solvers by crafting a future-focused curriculum, with a strong emphasis on the development of transdisciplinary skills. The school has a holistic outlook, with an explicit commitment to fostering not only academic learning, but also personal development, service, responsibility, and international understanding. In this way, it aims to nurture its students to become independent thinkers, with a desire to contribute to the community and the ability to achieve success in a rapidly changing world. An interesting feature of the school's innovative curriculum is the way these outcomes are nurtured continually from preschool to high

In undertaking the hard work of developing more innovative schools, we need to avoid short-term thinking and the endless, quixotic search for a quick fix.

school, with programs in areas such as environmental education, intercultural awareness, and the development of effective learning dispositions clearly articulated throughout.

Emblematic of the school's approach is an extended project undertaken by students at the culmination of their elementary school learning. In their last unit of work prior to graduation, the students collaborate to create a video documentary that investigates the systems that give life to a nearby city. In this multi-disciplinary study, students draw deeply upon their knowledge, skills, and understandings from a range of subject areas. During the unit, students alternate their time between individual inquiries into specific systems operating in the city—such as transport, finance, and education—and documentary production by taking on roles as directors, script writers, and artists. In this way, their exploration of complex relationships and interdependence in relation to the systems operating in the city is reflected in, and made more immediate by, their ongoing collaboration during the production process.

The project culminates in a family evening that opens with an exposition of the students' learning journeys during the production process and concludes with a gala screening of the finished documentary. The inquiry-centered nature of the unit continually opens fresh perspectives and new understandings, with students charting their own learning pathways by conducting interviews, online research, and practical investigation. While individual accomplishment retains an important place in the project, there is a central and explicit focus on the aspects of learning that Wagner sees as central to an innovative culture: teamwork, multi-disciplinary perspectives, a deep questioning of the status quo, and risk taking. In this way, the school provides a model for innovative education, while also undertaking the important work of developing students with the knowledge, skills, and understanding to help guide our future transformation to a more collaborative and innovative society.

The Next Step

In undertaking the hard work of developing more innovative schools, we need to avoid short-term thinking and the endless, quixotic search for a quick fix. The successes of the case studies referenced in this article highlight the power of systems that align the learning of students, teachers, administrators, and system leaders with the goal of developing a wider culture of inquiry and innovation. While it is essential that the larger forces of government and business engage with the challenge of reimagining education, it is also critical that we support teachers, administrators, and communities in crafting local learning environments that address their particular needs. It is exploring the connections between the work of these different stakeholders that will help us define the next steps in our efforts to reimagine education. ∎

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Teach, Lead, Change
Educational Change That Works for All

ANDY HARGREAVES AND DEBORAH WALLACE

From year to year, education reform remains at the top of the U.S. political agenda. The recently passed Every Student Succeeds Act is just the latest attempt to improve educational outcomes. But according to educational researcher and writer Andy Hargreaves, such interventions are bound to fall short of expectations unless they include a strong investment in the teaching profession, a concerted strategy to develop local leadership, and effective collaboration that spreads responsibility for all students' success across a community or region. In this interview, Andy discusses his research on how educational reform can have the desired impact.

Andy Hargreaves   Deborah Wallace

DEBORAH WALLACE: You have been doing cutting-edge work in educational reform for many years. Would you give us a brief overview of your work?

ANDY HARGREAVES: My work in the U.S. and globally currently focuses on understanding and influencing the major change movements in education. I am trying to separate those that are desirable from those that are less desirable and to distinguish effective and ineffective strategies.

The other major area of my work centers on the importance of teacher professionalism and how to improve the quality of educational leadership. This aspect of my work is organized around three "big ideas": professional capital, uplifting leadership, and what I call the Fourth Way.

Three Big Ideas
WALLACE: Let's look at each of these separately. What is professional capital and what role does it play in educational reform?

HARGREAVES: I developed the idea of professional capital with Michael Fullan in response to federal and state governments that support an individual human capital view of teaching. The human capital view rests on the idea that the quality of teaching is raised by evaluating all teachers individually, removing those who are inadequate, and substituting them with often younger and lower-paid replacements.

However, our research demonstrates that social capital is more powerful than individual capital. Social capital is when teachers work together across classrooms, grades, and subject matter to expand their

ideas and strategies, offer mutual help, and take collective responsibility for all students' success. You will not improve whole systems by having lots of individuals running around evaluating other individuals. Improvement will come by creating the expectations and conditions for professionals to work together. Thus, professional capital is the result of hiring highly qualified and well-trained professionals who can work effectively together and develop their judgment and expertise over time.

WALLACE: Another one of your big ideas is uplifting leadership. What are the underlying principles there?

HARGREAVES: The basic idea of uplifting leadership is that we uplift the people we serve by uplifting the people who serve them. This seems obvious, but many organizations try to boost student achievement by beating down the adults responsible for delivering the results. We inspire employees to make a difference and not just make money. We uplift students' opportunities and quality of life by lifting their spirits and inspiring the working environment of the adults who teach and support them.

In *Uplifting Leadership* (Jossey-Bass, 2014), a book I coauthored with Alan Boyle and Alma Harris, we identify six key components of uplifting leadership that apply to different sectors, including education:

*   Having a bold and relentlessly pursued dream
*   Sometimes doing the opposite of what others expect
*   Collaborating with competitors
*   Pushing and pulling one's peers into change
*   Combining good data with good judgment
*   Growing at a sustainable rate

Uplifting leadership, as expressed in these interlocking practices, produces unusually high performance in organizations that do a lot with a little or, in the face of challenging circumstances, that turn their performance around to be superior to what it was or start something new and sustain it beyond the initial phase.

WALLACE: The concept of the Fourth Way is foundational to your work. What is it?

HARGREAVES: The Fourth Way is derived from analyses of the world's highest-performing systems. It is not about a few innovations scattered in one or two schools or about top-down reforms that meet narrow standards. It is not even about investing our efforts and hopes in technology and data systems. It is about:

*   Having a broad humanistic and creative educational orientation for students, taught by high-quality teachers who work collectively
*   Reducing the amount of standardized testing
*   Developing leaders of all kinds who work collaboratively with other schools and school districts for the common good of all their students

> **You will not improve whole systems by having lots of individuals running around evaluating other individuals.**

When our work first came out in 2009, there was a lot of interest, but it was definitely seen as a bit far ahead of the curve. Nobody was rushing out to sign up for some kind of Fourth Way cult. And that was a good thing, because an important concept

The Four Ways of Change	
The First Way of Innovation and Inconsistency	Teachers are trusted to exercise individual initiative and autonomy
The Second Way of Markets and Standardization	Schools and teachers are judged by how they compete to comply with top-down standards of tested accountability
The Third Way of Data and Technology	Teachers' judgments and interventions are driven by numerical data or bypassed by digital technology
The Fourth Way of Collective Responsibility	Teachers, parents, and communities work together to take collective responsibility for improving the learning and wellbeing of all students

The eras of reform that educational change has passed through over the past 50 years in many countries.

of the Fourth Way is that each system and culture needs to respond in its own way based on a set of broad principles.

> **An important concept of the Fourth Way is that each system and culture needs to respond in its own way based on a set of broad principles.**

While people still disagree about the best directions to take educationally mainstream organizations like the National Center for Education and the Economy and the Organization for Economic Cooperation and Development are now advocating for broader educational goals for students, for a stronger teaching profession, and for standardized testing that is limited to two or three grades rather than occurring every year. The Every Student Succeeds Act is an example of a policy that is now seeking to work with the education profession rather than against it, and that is trying to encourage greater professional responsibility rather than impose more bureaucratic accountability.

Students and Educational Reform

WALLACE: How do you bring schools and students more directly into your approach to educational reform?

HARGREAVES: We need to pay attention to three areas in particular: student engagement, student wellbeing, and student identity. These are not separate from the focus on teachers, because to improve student engagement, you have to improve teacher engagement. To develop student wellbeing, you have to develop teacher wellbeing. And to consider and include different kinds of student identity, you also have to consider and include different kinds of teacher identity.

WALLACE: How do student identity and teacher identity figure into educational reform?

HARGREAVES: Think of everything that is involved in building a positive identity. A positive identity is not just self-esteem but also self-

confidence. Self-confidence in turn is grounded in acceptance and inclusion as well as in achievement and accomplishment. Building positive identity means recognizing and paying attention to students from different sociocultural backgrounds, families, communities, and language groups. It means recognizing, valuing, and supporting students with different abilities and disabilities. Building positive identity requires educators to pay attention to issues of gender identity and to the prejudices that sometimes surround it. It calls on us to address the bullying that is a problem in many schools and cultures, and to acknowledge that some of the highest-achieving societies are not necessarily the ones where the students are happiest with school.

Excellence and equity of student achievement are recognized worldwide as fundamental goals of reform, but there is less recognition that inclusion of disabilities and human rights are also fundamental goals. Countries may have high achievement in some respects but poor track records in relation to student inclusion or offering a curriculum that recognizes human rights.

High-Performing Systems

WALLACE: Much of your research centers on high-performing systems. What have you found out about them?

HARGREAVES: Over the last few years, my colleagues and I have concentrated on high-performing and steadily improving educational systems. Sometimes the system is a country, like Singapore. Sometimes it's a province, like Ontario or Alberta, Canada. If we were working in the U.S., individual states would be the systems.

I spent a month in Singapore with a colleague from that country's National Institute of Education, writing a case study about their high-performing schools. The study was based on on-site observations in schools and interviews with high-level leaders in the Ministry of Education and from their main professional associations. We did not just helicopter in as outsiders but worked closely with

people in the system to understand it. We were keenly aware of the distinctiveness of Singapore's culture, evolution, and history.

We have also done similar work in Finland. I was invited by the Organization for Economic Cooperation and Development (OECD) to work with a small team to investigate the role of leadership in the Finnish educational system, which at the time was the best in the world, according to OECD's achievement indicators. We visited schools and local municipalities and conducted policy and professional interviews. From the outset, as in Singapore, we made it a point to understand the Finnish culture and history.

> **We did not just helicopter in as outsiders but worked closely with people in the system to understand it.**

In all our work, we try not to make a quick in-and-out raid but to work in collaboration with local people to really understand that culture and system. On one level, these countries look like they have absolutely nothing in common, but once you engage first-hand with the culture, and work with people who are a part of it, you begin to understand what these high-performing systems have in common.

WALLACE: What characteristics do high-performing educational systems share?

HARGREAVES: Well, there are a few things. One is that they all really value their teachers. For example, in 2015, the outgoing Minister of Education in Singapore gave a speech dedicated to thanking and appreciating the country's teachers. Singapore also recently announced a pay raise for all its teachers. It's clear that it values teachers by ensuring their financial as well as emotional and professional stability. It wants education to be competitive with other market sectors so teachers

don't leave for more financially rewarding occupations.

Ontario, Canada, where I am an education adviser to the premier, also believes in a strong professional teaching force. As in other Canadian provinces and in Singapore, almost all of the public is invested in the success of all of the province's public schools. The public system isn't for other people's children—it's for the children in your family as well as the community. As in Singapore, there is strong support for keeping and developing high-quality teachers and great respect for the teaching profession.

> **Singapore wants education to be competitive with other market sectors so teachers don't leave for more financially rewarding occupations.**

WALLACE: In addition to placing such a high value on teacher professionalism, what other characteristics do high-performing schools have in common?

HARGREAVES: They also devote a lot of resources and attention to leadership development at the local level. In England, for example, the London boroughs of Tower Hamlets and Hackney, the city of Birmingham, and the Greater Manchester region have all concentrated on building local leadership capital. Hackney, for instance, stopped importing school leaders and district staff from outside and instead identified young teacher leaders internally and gave them intensive support and mentoring. All leaders within a local school district work together to assist any school that is struggling. As a result, all of Hackney's schools have improved, and the borough now performs well above the national average. Manchester went a step further when 10 neighboring local authorities collaborated to raise the achievement level in the whole region.

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To summarize, high-performing educational systems include strong investment in the teaching profession, a concerted strategy to develop local leadership, and effective collaboration that spreads responsibility for all students' success across a whole community or region. This approach looks very different from the United States, where sometimes it seems that in the face of charter schools and private takeovers, public school districts are underperforming and withering away.

The Role of Culture

WALLACE: You talked about the role of culture in your research. Why is it so important?

HARGREAVES: The culture of a country is very important. The Minister of Education in Singapore told us that educators from other countries coming to study its success tend to focus on only one or two aspects of the Singapore system that they think they can integrate into their own systems. An example of something that has failed is the attempt to import multitrack career ladders for teachers. People see that practice and think, "Oh, career ladders must be the answer for us, too," and then go back to their own school systems and try unsuccessfully to implement career ladders.

But it doesn't work that way. As the Singapore Minister of Education said, "What people don't understand is that so much of what we do in our education system is embedded in our culture." Another prime example of a cultural trait that doesn't translate easily from one country to another is Singapore's high-intensity parental involvement in children's learning and achievement.

Learning Not Test Scores

WALLACE: Interest in educational reform seems to be gaining traction. Why do you think it is?

HARGREAVES: I think people in the U.S. are beginning to see that existing solutions have been exhausted, even the ones that have contributed to progress. The No Child Left Behind Act is one example. It has become manifestly clear to everyone that schools have continued to fail even after its implementation. The overhaul of that strategy in the Every Student Succeeds Act is an effort to rectify the problem.

If you're a teacher and one of your students is failing, then it's probably a problem with the child. But if you're a teacher and all of your students are failing, it probably has something to do with you. The same is true with policy. If every school is failing, it's probably not a problem with the teachers but rather with the policy.

Americans are becoming more aware of the enormous problems we face as a country and as a world. They worry about their children's future. More affluent parents worry that their kids will still be living in their basements until they're 38 years old. Working parents worry about their kids getting a proper job at all. They're also seeing that work is no longer a single job but a few jobs cobbled together, which means individuals somehow have to assemble a working life from different bits and pieces. Parents know that education, not higher scores on standardized tests, is vital for helping people think through the problems in their own communities and arriving at better answers.

WALLACE: These are huge challenges. What is it going to take to develop a more effective system?

HARGREAVES: Three things, I think. One is that we need more flexibility. Some people believe the way to get that is through a free market that lets in new ideas and approaches. But many of these approaches work independently of each other. The problem is that when schools or school districts operate independently, they risk losing what Peter Senge talks about so much—the capacity to learn from each other.

> **When schools or school districts operate independently, they risk losing what Peter Senge talks about so much—the capacity to learn from each other.**

The second thing we need to understand is that improving performance is a collective responsibility and requires not just more collaboration but more robust collaboration. Robust collaboration is not only the sharing and networking of ideas; it's people taking collective responsibility for the success of the whole community, including neighboring schools that may be struggling. This is one of the massive, moral responsibilities of our age. It is also one of our areas of greatest leverage.

The third requirement is acknowledging that social and emotional learning is connected to and as important as cognitive learning. A recent study ranked the countries where children in school are the happiest and where they are the unhappiest. The country where the children are unhappiest is South Korea because of the enormous pressure for a particular kind of tested achievement. The second unhappiest country is, surprisingly, England. England, like the U.S., has some of the greatest inequalities among the developed countries in the world, and we know that great inequalities lead to bad outcomes.

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We are now starting to think more explicitly about the skills and knowledge that are needed for a 21st-century economy.

Challenges for Next Generation Leaders

WALLACE: What will be the toughest challenges for the next generation of education leaders, and what will they need to succeed?

HARGREAVES: There are three main challenges. One is the sustainability of educational leadership. Susan Moore Johnson's book, *Achieving Coherence* (Harvard Educational Publishing Group, 2015), looks at five unusually high-performing urban districts. One thing that characterizes all of them is leadership stability, where high-level leaders have been able to commit to changes and see them through over a long period. So, the first challenge for the next generation of leaders is to be committed to something of compelling moral importance that they are prepared to give much of their life to.

A related challenge is sharing that moral commitment with others, because without shared commitment, leaders will end up becoming martyrs for their cause.

The third challenge is whether leaders can stay in a particular institution long enough to see this process through, rather than moving on to something else every two or three years. Can they leave a legacy and some kind of succession plan that identifies other excellent leaders who can continue to carry the vision forward? New leaders often want to make their mark, but it's important that they do so not for their own sake but also with consideration of what their predecessors have achieved and what the community needs.

All three of these challenges are timeless, but when public education is under such a massive threat, we need to focus on them now more than ever.

The biggest priority is not that leaders should know everything about science or everything about second language acquisition. The biggest challenge is to know which things are most important, to find the people who know most about them, and to be able to get those people to work together in a committed and collaborative way for the benefit of all their students.

WALLACE: What are the most essential conditions for achieving educational improvement?

HARGREAVES: First, all stakeholders need a clear view of learning and human development. In the past decade, this agenda has been driven by a focus on student achievement on standardized tests. We are now starting to think more explicitly about the skills and knowledge that are needed for a 21st-century economy. Consideration of how students can become better engaged in a diverse society and global community is an important element. This is the direction public debate needs to be moving in and where our next cycle of work needs to focus.

Second, we need a strategy for developing a strong teaching profession that can help students develop in ways that are important to them and to society. Our global work on teachers' professional capital characterizes this kind of teaching force as one that is:

- Thoroughly prepared
- Challenged and stretched over many years of practice and growth throughout a career
- Highly collaborative within and across schools
- Well organized collectively

Third, we need leaders who uplift students' achievements and opportunities by uplifting and inspiring the adults who serve them. Not all of this leadership should come from the top—the principal or the superintendent. Given the inequities between schools and school districts, we need more leadership from the middle—schools working with schools and districts with districts, not only sharing practices and ideas but also taking collective responsibility for mutual success.

Last, we need a theory and strategy of change, one that is based on:

- Trust and responsibility not on threat and accountability

- Collaboration more than competition
- The building of capacity from within rather than the importing of solutions from outside
- The coherence of a system where diverse solutions fit rather than on the alignment of a system where everybody complies
- The importance of learning rather than an obsession with testing

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We need more leadership from the middle—schools working with schools and districts with districts.

If we are to achieve fundamental reform in our education system, we must commit to re-examining it with an open mind and with a united effort to engage all key stakeholders—students, parents, teachers, administrators, schools, social programs, and government. ■

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Andy Hargreaves is the Thomas More Brennan Chair at the Lynch School of Education and Professor at the Carroll School of Management at Boston College. He also serves as adviser in education to the Premier of Ontario and is President Elect of the International Congress for School Effectiveness and Improvement. Andy's books include *The Global Fourth Way* (with Dennis Shirley), *Professional Capital: Transforming Teaching in Every School* (with Michael Fullan), and *Uplifting Leadership* (with Alan Boyle and Alma Harris). *andrew.hargreaves@bc.edu*

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Commentary

PASI SAHLBERG

Pasi Sahlberg

Seymour Sarason, a former psychology professor at Yale University, often said that those who dedicate their lives to changing schools deserve "God's blessing." Among other things, Sarason was known for highlighting the need to take school culture into account when introducing change initiatives. His book, *The Culture of the School and the Problem of Change*, first published in 1971 by Allyn and Bacon, altered the way we understand how schools change—or why they don't. His other books, including *You Are Thinking of Teaching?* (Wiley, 1993) and *Letters to a Serious Education President* (Corwin, 2006), are frequently mentioned as masterpieces of scholarly thinking and writing. Sarason influenced the thinking of many education reform scholars around the world, including my own, and in many ways is the father of the contemporary educational change community of scholars.

Like Sarason, Andy Hargreaves has played a key part in understanding and influencing the major global change movements in education. What distinguishes him from many other educational reformers is his dedication and commitment to working on the ground with students, teachers, politicians, and other change makers to bring about intended improvements. The interview in this issue of *Reflections* offers a vivid example of his versatile philosophy and theory of educational change, both of which have had a strong impact on school reform around the world.

> **Many people call themselves educators, which is one reason the literature about education reform is so vast and diverse.**

The Complexity of Educational Reform

Educational reform is a complex field of academic knowledge, research, and praxis. Many people call themselves educators, which is one reason the literature about education reform is so vast and diverse. Points of view range from deeply thoughtful academic discourse to political rhetoric. Unfortunately, such writings are rarely helpful in understanding—and managing—the complexity of education reform.

Andy is one of those few individuals who, like Sarason, sculpts his ideas from a sophisticated blend of philosophies, cultures, arts, and even sports. Because of the depth and breadth of his knowledge, his perspective on educational improvement speaks to an international community, including interested parties in English-speaking countries, Scandinavia, Latin America, the Middle East, and East Asia.

Also like Sarason, Andy has been ahead of his time throughout his career. In his 1994 book, *Changing Teachers, Changing Times: Teachers' Work and Culture in the Postmodern Age* (Teachers' College Press, Columbia University), he introduced modernity and post-modernity as perspectives in understanding education systems and how they change. *Modernity* refers to certain sets of attitudes and social norms originating in the Age of Enlightenment,

including determinism, linearity, and an obsession with evidence and data. *Post-modernity* is the social condition that followed modernity. It represented social systems as complex, non-linear, organic entities that don't necessarily obey deterministic rules or laws.

At the time that Andy wrote *Changing Teachers, Changing Times,* not many educational scholars dared to think outside the box of modernity in seeking answers to the increasingly complex world of educational reform. As I see it, that book was a seminal work in the teaching profession. Andy further developed these concepts in his award-winning book, *Professional Capital,* written with Michael Fullan, which introduced the ideas of collaboration (or social capital), teachers' work (or professionalism), and the process of change (or leadership) in the context of educational change.

Global Educational Reform
Over the decades, Andy has documented trends in educational reform efforts around the world. In *Learning to Change: Teaching Beyond Subjects and Standards,* published in 2001, he presented evidence-based criticism of the standards-based reform movements of the 1990s. In the process, Andy documented the need for emotional and intellectual aspects of change in order for reform efforts to succeed.

In 2010, Andy and some colleagues published a landmark book, the *Second Handbook of Educational Change* (Springer International Handbooks of Education), in which they demonstrated the global shift toward standardization, student testing, teacher evaluation, school accountability, technology-led teaching, and measured proficiencies in basic competencies (i.e., reading, mathematical and scientific literacy) as common priorities in education reforms. What became known as the Global Educational Reform Movement (GERM) can be traced back to the so–called "Second Way" of education reform thinking of the 1980s that promoted the replacement of teachers' professional autonomy with market competition and educational standardization based on the ideals of efficiency, productivity, and rapid "service delivery."

If we wish to create dynamic and innovative learning environments for students, then we must create the same types of workplaces for teachers and leaders.

This approach enforced consistency through testing, standardization, and accountability, and introduced competition through school choice. Since then, it has increasingly become adopted throughout the world, including in the United States, England, many provinces of Canada, Germany, and in the transition countries and developing world.

GERM is also embedded into the "Third Way" of change which, according to Andy and his coauthor Dennis Shirley in *The Fourth Way: The Inspiring Future of Educational Change* (Ontario's Principals' Council and the National Staff Development Council, 2009), added data-driven decision making to teachers' toolkits, but also skewed attention toward performance metrics and away from the people and learning that the numbers are meant to represent. Today, GERM is promoted around the world through the education strategies and interests of international development agencies, global education corporations, the media, consulting firms, and private donors. Venture philanthropy, especially in the United States, injects billions of dollars into public education systems and often borrows concepts and ideas from corporate management.

The Leaning Tower of PISA
In response to these trends, Andy and I both became concerned with how international student assessments, especially PISA (Programme for International Student Assessment), coordinated by the Organization for Economic Cooperation and Development (OECD), are increasingly misused as a method to determine the quality of education systems. We published an op-ed titled "The Tower of PISA Is Badly Leaning" (*Washington*

Post, March 24, 2015), in which we articulated our reaction to the global debate about PISA. We supported the need for international measurements about performance of education systems, arguing that without them, we would never have learned what really drives successful educational change in Canada, Singapore, and Finland, for example. But we also pointed out that these measurements must be reliable and trustworthy.

Whether the tower of PISA will stand tall as a helpful beacon for policy makers or whether it will fall over, we wrote, depends on how much governments and the global education community regard PISA as a valid instrument that is immune to commercial and ideological interests. Since the introduction of PISA in 2000, OECD has placed its trust in the hands of an international consortium of professional organizations to control how the tests are designed, how data are collected and used, and how results are analyzed. With data from more than half a million children accessible to education corporations for their business purposes, teachers' trust in these international assessments and surveys may deteriorate, with many teachers losing confidence in the ethics of Big Data altogether.

A View of the Whole

During the past decade and half, I have worked with Andy both in research and in practice. He has mentored me to think deeply and boldly about educational change. We agree on many things and disagree on others. But that is fine. What I admire more than anything else is his ability to understand how other people think, why they think the way they do, and how to build his own learning on other people's perspectives.

> **With data from more than half a million children accessible to education corporations for their business purposes, teachers' trust in these international assessments and surveys may deteriorate.**

When I was first introduced to Andy's work, I was immediately fascinated by the way he organized his theories of educational change. His approach—grounded in the view of the system as a whole—was a perfect complement to my own work, which was missing that element. It has been an interesting journey to first learn from and later be part of generating theories with Andy.

In all his writing, Andy returns to Sarason's themes of change but in different ways. This is how it should be. I recall someone asking Peter Senge why he repeats the same ideas about learning organizations time and again. He replied that he would continue to do so until things change. The same can be said of Andy's work.

In the opening of his book *The Predictable Failure of Educational Reform: Can We Change the Course Before It's Too Late?* (Jossey-Bass, 1990), Seymour Sarason wrote, "This book is not likely to win me friends, indeed, I may lose some." Andy could have expressed that same concern at the beginning of some of his books. But to me, scholars like Andy represent courageous thinkers, visionary opinion leaders, and fearless activists who make the world of educational change more optimistic than it would be without them. They certainly deserve "God's blessing." ∎

ABOUT THE AUTHOR

Pasi Sahlberg, PhD, is a Finnish educator, author, and scholar. He has worked as a school teacher, teacher educator, researcher, and policy advisor in Finland, and has studied education systems and reforms around the world. Pasi is a former Director General of Finland's Ministry of Education and Culture and is currently a visiting Professor of Practice at Harvard University's Graduate School of Education in Cambridge. Twitter: *@pasi_sahlberg*

Finding Connectivity
Narrowing Gaps to Discover New Possibilities

CHARLES HOLMES AND DEBORAH WALLACE

In this interview, convener, teacher, and consultant Charles Holmes reflects on his lifelong work of connecting people with ideas and possibilities to help them innovate, collaborate, and create. Charles fosters profound dialogue around desired futures, leading to deep levels of engagement, connectivity, and mobilization for small groups, organizations, and whole communities. His work has also taken him on a personal journey of self-discovery, where he has learned which internal mechanisms allow him to be fully present and focused on the group at hand and which ones keep him from achieving that state.

Charles Holmes   **Deborah Wallace**

DEBORAH WALLACE: For our readers who may not be familiar with your work, please give us a brief summary of its core principles and also name a few clients you've worked closely with.

CHARLES HOLMES: I work with a wide range of clients, including Unilever, Pepsi, SC Johnson, and other corporations. I also work with NGOs, including the Salvation Army and the Dalai Lama Center for Peace and Education, and with a range of municipal and federal government agencies. The creating process, as described by Robert Fritz and Peter Senge, is foundational in all of my work. Helping groups and individuals to establish structural or generative tension is the most powerful means I have discovered to achieve results. Five fundamental questions are at the heart of this work:

- What do we want to create?
- Why?
- What is our current reality?
- Are we truly committed to holding generative tension over time?
- What actions are we going to take to build momentum?

In the context of this framework, I bring a range of different tools, skills, and capacities. Perhaps the most important is the capacity to listen and synthesize, in service of building shared understanding (see "Principles for Creating Generative Conversations," p. 26).

Part of the System
WALLACE: Your work is about helping people engage, connect, and mobilize to define the future they want and to develop the capacities and culture they need to succeed. Has it also been a journey for you in terms of your own development?

Principles for Creating Generative Conversations

MICHAEL JONES

Michael Jones

In 2009, Jaya Kumar, then CEO of Quaker Foods North America, asked Charles Holmes and later me and other colleagues to design a conference around the theme of "Connecting for Our Future." As Jaya explained, "Too often the language we use reduces the scale of what we want to accomplish. As a result, we apply tactical solutions and expect transformational results. I want to engage our culture in a series of conversations . . . that can transform how we think, how we feel, and how we act."

The invitation that Jaya sent to conference attendees included a powerful message: "Our greatest challenge is to define our future in a way that is aligned with our deepest goals and aspirations. We must ask, what is the destiny we see for our company that we would be most proud of? And how can our esteemed past inform our future? Our forefathers have created something that has endured the passage of time. How can we learn from these roots? And what is our gift? Imagine the power of an organization that not only understood the gift we individually brought but figured out how to unleash its power . . . Our journey begins today, not with meetings or schedules, but with the dignity found in every conversation."

Based on our belief and experience that leaders want to be part of a collective human emotion that encourages shared tolerance, openness, diversity, and care, we designed the conference in the context of Jaya's challenge based on the following learning principles:

- Focus questions on the big picture and on articulating the destiny and deeper purpose of the enterprise over the long term rather than in the short term.
- Encourage leaders to reach for the impossible and not limit themselves to what they already know how to do.
- Create opportunities for "conceptual blending" to discover how individual ideas, points of view, and cultural perspectives can coexist and lead to new possibilities and connections.
- Focus on creating an environment that will invite a spirit of collaboration and bonding.
- Use music to create a welcoming and natural environment that encourages relaxed and unfocused generative conversation.
- Include music, story, and art to create an animated environment that leads to conversations that are more than simply exchanges of information but that invite a range of possibilities for establishing new and creative options for action.
- Be willing to forgo a formal plan and follow whatever is happening in the moment.

"Our greatest challenge is to define our future in a way that is aligned with our deepest goals and aspirations."

In these ways, we helped Quaker Oats unleash the power of its unique gifts and destiny and ensured that there would be dignity in every conversation.

Michael Jones is a leadership educator, speaker, dialogue facilitator, writer, and Juno-nominated pianist/composer. He is the author of *The Soul of Place: Reimagining Leadership Through Nature, Art and Community* and a columnist with Management Issues, a UK-based global business and leadership publication. *www.pianoscapes.com* *www.thesoulofplace.com*

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HOLMES: When I reflect on developing my own practice, I realize that being able to be present, centered, focused on the desired results, and fully aware of the dynamics of a group process in any given meeting has been a continual journey. I can think of many times that I have slipped into what Robert Fritz calls "first-person orientation," thinking to myself, "How am I doing? Am I really making a difference here? Am I the right person for this task?" In those moments, my focus is clearly on me and not on what the group is striving to create.

Daily practices—specifically meditation, breathing, and centering exercises, which help me stay present and grounded—have been crucial to my own growth and development.

WALLACE: You are necessarily part of every system you work in. How do you look at yourself in a system and understand how you're influencing it?

HOLMES: As a cultural anthropologist, I am highly aware that my presence influences the system I am engaged with. Staying curious and open to

what's happening in a room, being able to make necessary adjustments as things shift and moods change, and being conscious of my own role in the dynamic are key. A significant part of my task is to help others examine how their thinking, their actions, their language, and their beliefs impact their ability to create results.

"What's my contribution to the thing I complain the most about?"
— Peter Block

Peter Block has a lovely question related to this process: "What's my contribution to the thing I complain the most about?" It's about bringing a level of awareness to the situation and the courage to own up to your own vulnerabilities. It's easy to alienate people by projecting a persona of overconfidence—that, as the facilitator, you have all the answers. Block warns, "Don't get seduced by people's dependency on you as an expert."

The Importance of Connection

WALLACE: Why do you think you've been referred to as a "social alchemist"? What does that mean in the context of your work?

HOLMES: I will never forget a conversation I had with the author Jim Collins. He asked me to describe what I do. He listened intently and responded by saying, "So you are a social alchemist." The practice of bringing together elements, in my case people and ideas, and connecting them to discover powerful new possibilities is something that has deep resonance for me. This is how I define social alchemy and I think it is what Jim meant.

> **The practice of bringing together people and ideas and connecting them to discover powerful new possibilities is how I define "social alchemy."**

There are few things I love more than connecting people who might not otherwise meet, because I see possibility for great things to be created as a result of their discovering each other. For me, it is more than simply introducing people who I think might enjoy meeting each other. It is connecting people to create change that may otherwise not occur. I am thrilled to be able to point to collaborative projects in countries around the world that have emerged from these connections.

Next-Generation Alchemists

WALLACE: What do you think will be the priorities and challenges of the next generation of alchemists?

HOLMES: For the past five years, I have been part of a group that has been meeting regularly to explore what we are learning about how to broaden the impact of significant systems change efforts that are occurring around world. Our initial gathering convened a group of about 12 master practitioners, or exemplars, who had been working in different parts of the world in diverse and challenging contexts to create significant changes.

The intention of this gathering of exemplars was to share and reflect on what we were learning about our work in the world.

The formation of the Academy for Systemic Change was a result of these meetings. It became clear to us that there was no shortage of people creating impactful change around the world. The question we pondered was, "What can we do to spread and share the practical know-how of those who are doing significant systems change work around the world?" We realized that although there are similarities in how people are leading awareness-based systemic change efforts, not much is being done to capture, share, build, and disseminate the practical know-how that exists.

Supporting the growth of this field of knowledge became our focus, and from this came the creation of the Next Generation Leaders program at the Academy for Systemic Change. We have just completed the first prototype year, bringing together 20 young leaders who are already achieving remarkable results and who are committed to advancing the overall field. A challenge and a priority for all of us is building the field and sharing and disseminating what we know and what we are learning about creating change.

WALLACE: How is the Academy building the field?

HOLMES: One way is through the Next Generation Leaders program itself. The prototype has involved three week-long, face-to-face meetings, online case clinics, one-on-one coaching, and online learning modules that we call "learning hives." In addition, we have been inspired by the Bauhaus Movement, which greatly influenced the field of design in the early 20th century. As a result, we have organized what we call *The Social Bauhaus Compendium of Tools for Systemic Change*. The compendium consists of over 150 tools that we have organized in five broad areas: theories and models of change, developing self, leading in teams and networks, leading in systemic change, and managing systemic change processes.

WALLACE: What do you see as the greatest possibilities and areas of impact for the Academy?

HOLMES: There are many. One thing that is most exciting for me is seeing the connections that are occurring among the Next Generation Leaders. Many are now collaborating with each other in ways that we could never have imagined. The larger possibility that we are all working toward is the growth of the field as a whole.

> **Although there are similarities in how people are leading awareness-based systemic change efforts, not much is being done to capture, share, build, and disseminate the practical know-how that exists.**

A Learning Place and Model

WALLACE: When people talk about you and your work 30 years from now, what do you want them to say?

HOLMES: That's a timely question, as I recently turned 50 and have been thinking, all right, what has this life been and what do I want it to be? What have I done thus far? Has it been significant, sufficient? I can comfortably say, yes. I have been blessed with incredible opportunities and feel grateful that I have had the chance to impact the lives of so many people.

So, what do I want the next 30 years to look like? I want to continue to create opportunities for people to discover their gifts and to connect people. I once framed my work as micro and macro facilitation. Micro is about designing and creating powerful spaces for people to learn and create results. Macro is about connecting people so they can discover intersections for collaboration and possibility that they otherwise may never have seen. This is the work that I will continue to do.

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A certain kind of courage and authenticity is required to say, here are the challenges and here's how I'm drawing from those as a learning opportunity to share with others.

WALLACE: Are there other things that you want people to associate with you and your work?

HOLMES: Yes. There's a piece around using my personal journey as a means to support learning. A certain kind of courage and authenticity is required to say, here are the challenges and even some traumatic events that I've experienced, and here's how I'm drawing from those as a learning opportunity to share with others.

Over the years, I have been discovering the importance and power of vulnerability—that by taking the risk to share some of the challenges I have grappled with on my own journey, I can open others to conversations and learning opportunities that are profound and powerful.

I also want people to associate me with narrowing the gap between the internal voice and perception of self and the external presentation of self. Narrowing the gap between perceived differences among and between people is something else I want to be associated with. This actually connects to something I said earlier, that one of the things I love most is connecting people who might otherwise never meet and helping them discover intersections of possibility they never knew were there.

Narrowing the gap between people and connecting people across cultures is kind of the meta level of how I want people to think about my work. At the organizational level, it's how I have contributed to supporting people and their efforts to learn about themselves, their work in the world, and their organizations by narrowing the gap between the espoused values and those actually lived. At the more micro and deeply personal level, it's narrowing the gap between my own internal voice and how I "show up" in the world. As Bill O'Brien, the former CEO of Hanover Insurance, said, "The success of an intervention depends on the interior condition of the intervener." It all starts there. ∎

ABOUT THE AUTHORS

Charles Holmes is a facilitator and educator who, for 25 years, has been driven by a passion for creating meaningful dialogue and the achievement of desired outcomes among diverse groups. He has worked with multinational corporations throughout North America, South America, Mexico, Asia, Europe, and Saudi Arabia. Charles is also a co-founder of the Academy for Systemic Change, a collaboration of global thought leaders committed to advancing the capacity for awareness-based systemic change. *charles@ceholmesconsulting.com*

Deborah Wallace is contributing editor to *Reflections*. *dwallace@brinkpointconsulting.com*

Mapping as Engagement
Systems Mapping for Systemic Change

JOE HSUEH AND JANICE MOLLOY

As one of the founders of the Academy for Systemic Change, Joe Hsueh is on the leading edge of applying system dynamics to enabling and sustaining large-scale change processes. *Reflections* interviewed Joe to learn about his evolution from public policy advisor to volunteer at a Buddhist monastery to MIT-trained system dynamicist. The common thread that weaves together Joe's richly diverse career is a commitment to partnering with others to make progress on challenging issues, ranging from personal health crises to global problems. At the center of Joe's approach is a sense of love and compassion that allows stakeholders to bring their best selves to the change processes they are involved in.

Joe Hsueh   **Janice Molloy**

JANICE MOLLOY: Tell us about your background.

JOE HSUEH: When I was 13, my passion was about transforming Taiwan's democracy. Taiwan just ended 38 years of martial law, and my heroes were political dissidents who risked their lives for democracy. I felt a vitality, drive, and energy from those who were fighting for social justice.

With the goal of one day bringing a new perspective back to Taiwan, I left Taiwan at 15 and later studied economics at McGill University in Canada. I liked the rigor in the economic way of thinking and the use of models to help you formulate your thoughts. What I didn't like was the assumption that the field made about human nature. It is true that we have selfish parts, but the idea of maximizing self-interest as a dominant drive in our decision-making did not fit with my experience as a human being.

In the meantime, Taiwan went through democratization. I put my heart into Canada by getting involved in public policy. After completing my first master's in Economics at Queen's University, I worked at the Canadian Ministry of Finance. While I enjoyed the work environment, I didn't feel I was fully alive. Something was missing. I was later accepted to the Master's program in Public Administration/International Development at Harvard's Kennedy School of Government, but I deferred my entrance so I could find out what I really wanted to create in this life.

I traveled around trying different things. I ended up volunteering at a Buddhist monastery and charity organization in Taiwan called Tzu Chi. Originally, I intended to stay for a week; after three days, I wanted to stay for the whole summer. After a month, I decided to stay for a whole year.

> **The idea of maximizing self-interest as a dominant drive in our decision-making did not fit with my experience as a human being.**

This monastery is a unique place in that it's about Buddhism in action. Yes, we do meditate, but most of the work is out in the world, for example, spending time with terminally ill cancer patients in Taiwan, or serving AIDS patients in Thailand, or providing disaster relief in El Salvador after an earthquake, or doing small-scale community service and development work in South Africa.

> **You can create the most sophisticated model, but what is it for? What's the purpose? Who are the humans behind it?**

Through those experiences, I learned that the greatest source of happiness is giving and receiving love. Through volunteer work, I receive love by giving love. My little act of giving enabled me to be in touch with my human nature by connecting me and strangers as human beings. Yes, we have a selfish side, but we also have a compassionate and loving side. This experience allowed me to re-access the very core of me and of what makes me happy.

The enabling environment that this monastery creates reinforces the good nature in each of us and allows it to grow in a virtuous cycle. I began to ponder, How can we create a similar environment in our modern workplace? Do we all have to behave selfishly, like neo-classical economics assumes, or does the underlying systemic structure induce how we behave? Can we create a compassionate workplace much like what Tzu Chi created in a community?

Tools for Seeing the World
MOLLOY: How did you come to study system dynamics?

HSUEH: I stumbled onto system dynamics during my second year at Harvard. In my program, I could take any class at MIT. I sat in on a system dynamics class and was blown away by this integrated way of thinking that offers tools, language, and methods to analyze and help people see the world.

Before being accepted into the PhD program in system dynamics, I worked with John Sterman as a visiting scholar for a year, developing the Industry Evolution Management Flight Simulator. John Sterman and Peter Senge eventually became my thesis advisors. I am grateful to both John and Peter, because they allowed me to learn the two sides of systems work. John taught me rigor—robust modeling and a focus on the core systemic dynamics using simulation tools. With Peter, I learned that you can create the most sophisticated model, but what is it for? What's the purpose? Who are the humans behind it? I strive to bring the two sides of the field—rigor and purpose, science and art—together as much as I can.

Shared Understanding, Shared Ownership
MOLLOY: How do you apply system dynamics to real-world challenges?

HSUEH: Over the past five years, I have been applying the tools I learned at MIT to help facilitate stakeholder dialogues to create, catalyze, and sustain systemic change, mainly in the fields of environmental, social, and economic sustainability. My colleagues at the Academy for Systemic Change and SecondMuse and I interview stakeholders and make their theory of change explicit by co-creating systems maps with them.

Mapping is a tool to bring large, complex systems into the room. It focuses on achieving three goals:
- Shared understanding of the complex system we are embedded in
- Shared vision of where we want to go and what we want to create
- Leverage points for collective action

One big project I did last year involved the idea of a cancer-free economy. It looked at how we might create an economy that accounts for the root causes of environmentally induced diseases such as cancer. A lot of our public and private dollars go to cancer treatment. But what if we look upstream at the root causes? Where did cancer come from? Where are carcinogens coming from? You can trace back and see that they come from certain

toxic chemicals in the products we use, the food we eat, and the environment we are exposed to. And then you can trace back through the supply chain to find where the toxic chemicals go through the economy. You also look at solutions and at how healthy products and processes can be generated.

This project involved creating a space for funders, activists working on different parts of the system, and businesses to come together to see these larger systems. We had people from different parts of the system—people working on green chemistry, toxic control, cancer research, consumer education, impact investing, policy, even on fossil-fuel divestment and climate change—talking to each other and collaborating. Because all of these elements are interconnected, we needed to find ways for them to collaborate and work together toward common goals instead of competing for funding.

In this case, we ended up creating a huge spaghetti map and then used it to guide our collective action. The participants are now in the strategic planning phase, based on the leverage points identified.

The "Right" Client

MOLLOY: What are the biggest challenges when you work with large multistakeholder groups?

HSUEH: Finding the "right" clients, ones with a learning orientation, is critical. It's important for them to come into this process with an open mind, to say, "I have my worldview, I have my mental model, but I'm curious to venture into the unknown of seeing the larger system together with other stakeholders." If someone comes with the mindset of "I am superior and because I have the financial resources, I get to dictate where to allocate them," you don't have that curiosity and genuine interest to learn and be vulnerable enough to say "I don't know."

Having stakeholders who say, "I know my part of the system well; I just don't know the other parts and I want to learn" facilitates what we call "systems awareness." We use collective dialogue to support

people's curiosity about the other sides' perspectives, especially the sides that they disagree with and have some conflict with (see "Collective Dialogue"). An example would be an NGO working to understand businesses or big polluters.

Creating the space for people to be open and curious and listening to each other is one of the biggest challenges but also the biggest promise. When we see each other as human beings, a lot can be shifted. We no longer operate at just the surface level but deep down, with what Otto Scharmer would call open heart and will.

> **When we see each other as human beings, a lot can be shifted.**

The Complexity Curve

MOLLOY: How do you introduce the tools of systems thinking and system dynamics to groups?

HSUEH: There is an art to introducing systems mapping. If you as an expert modeler create this big, complicated spaghetti map and just throw it at people, you scare them away. It's too overwhelming. There was an article in the *New York*

Collective Dialogue

Seeing SELF

- What is my work and where is it on the map? If not shown, where would I put it?
- What is my theory of change?

Seeing YOU and ME

- How does my success depend on your success?
- Does my work have unintended consequences to others?

Seeing WE and WHOLE

- Who is missing in the room?
- What is our shared vision? What are key indicators of success?
- What are high-leverage points for realizing our shared vision?

Times several years ago about a big strategy map that made fun of the work a little bit. It is true, if you just showed me a map like that, I would be paralyzed.

> ## If you create this big, complicated spaghetti map and just throw it at people, you scare them away.

The art is to slowly build that map together with the stakeholder, loop by loop, to bring people up to speed on how to understand the language of system dynamics. I always create a map in my mind, but I don't share it like that. First, I draw the backbone of the system, the physical structure— for example, how a toxic chemical flows through the economy. Then I draw a loop of the causes of those dynamics, asking people, "What do you think? What else is missing?" In this way, you start to expand the model in real time. Using this process, you gradually create the map with stakeholders without overwhelming them.

Complexity Curve
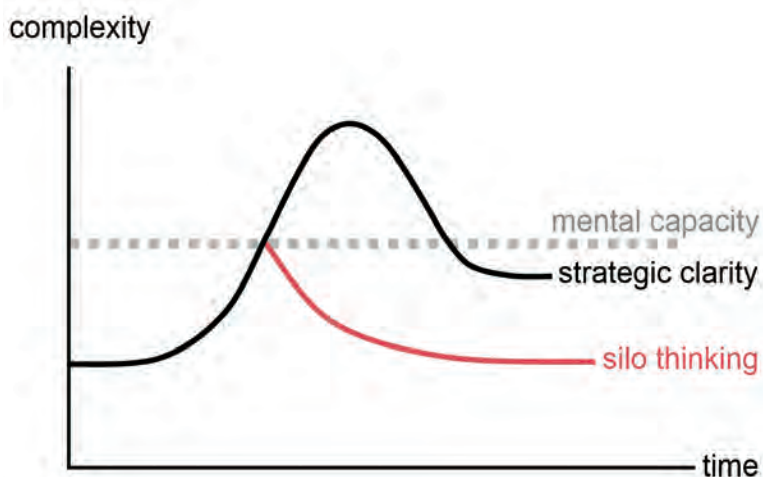
In building a map, there is a point in the middle of the process where people's mental capacity to hold the complexity is overwhelmed. Group members tend to return to silo thinking and action. The challenge is creating a learning environment that allows people to stretch beyond their comfort level to achieve strategic clarity.

I always show them what I call the "complexity curve" (see "Complexity Curve"). As we build a map, there will be a point in the middle of the process where it overwhelms people's mental capacity to hold the complexity. Typically when we hit that point, the group will say, "Let's go back to where we're comfortable, our usual way of doing things. We have done this systems work and it's not getting us anywhere; it's just too messy." Unfortunately, this brings the group back to silo thinking and action. The challenge then is creating a learning environment that allows people to stretch beyond their comfort level. If you leave them high on the complexity curve for too long, you create analysis paralysis, and people will say, "I tried it and it's all process but no action." So you want to go beyond conventional thinking but also bring them down to their comfort level.

The final part of the process is for stakeholders to see the larger system but also be able to distill the core feedback loops. The ideal is for stakeholders to be able to explain the core dynamics in two or three minutes—not all of the details but the core essence, the central dynamics, and the core levers for change. Then, if they need to look at the details in different parts, they can go to the complete map (see "Regenerative Rainforest Economy System Map," p. 38).
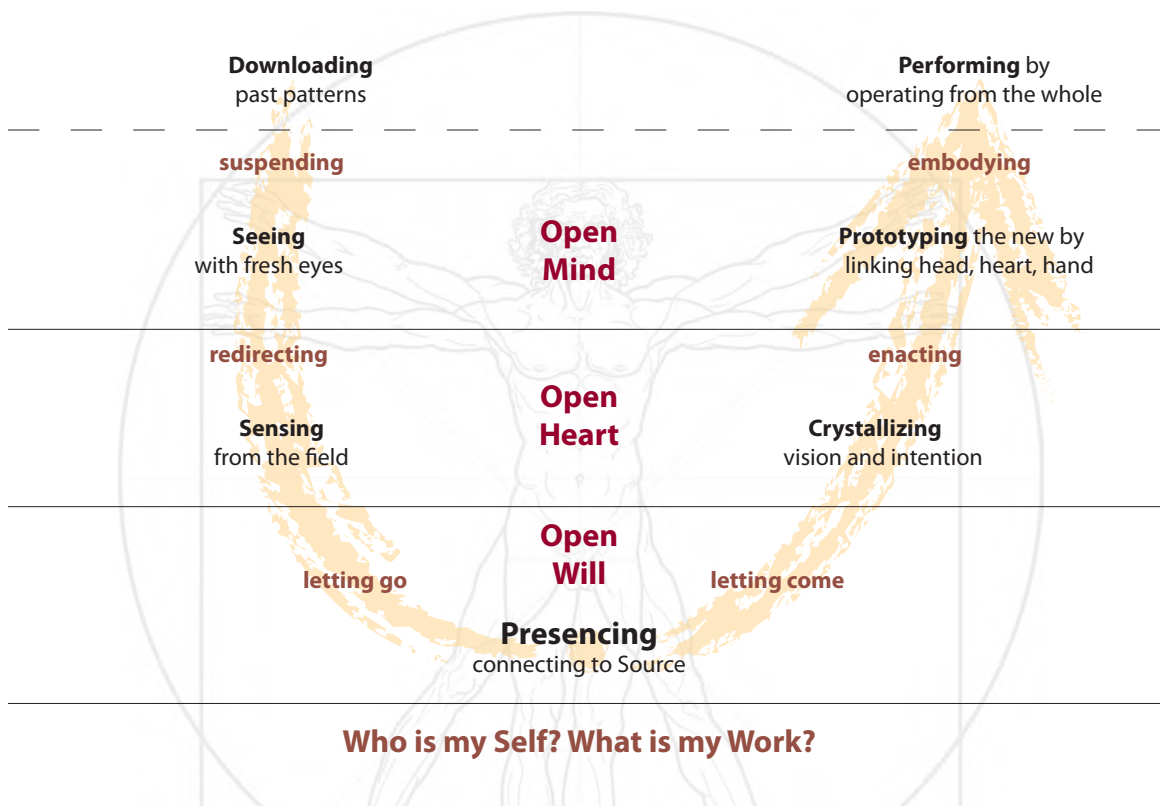
From Map to Action
MOLLOY: How do you help participants move from the map to concrete action?

HSUEH: For me, this is not a systems mapping process; it's a systemic change process. Mapping is just one of many tools to support that change process. Typically, my colleagues and I work with either funders or decision makers who have long-term goals; they want to see concrete, collective action coming out the other side. So who you work with, what their vision is, and how you design the project are key.

I use the U Process as a guide to design the change process and to facilitate dialogue. It fits well. I see systems mapping as a way of going

Theory U

Downloading
past patterns

Performing by
operating from the whole

suspending

embodying

Seeing
with fresh eyes

**Open
Mind**

Prototyping the new by
linking head, heart, hand

redirecting

enacting

Sensing
from the field

**Open
Heart**

Crystallizing
vision and intention

**Open
Will**

letting go

letting come

Presencing
connecting to Source

Who is my Self? What is my Work?

Theory U states that to create a new reality, we first need to open our minds, hearts, and wills. The bottom of the U represents a threshold where we let go of things that no longer work and move toward an emerging future.

Presencing Institute—Otto Scharmer—www.presencing.com/permissions

down the U. Going up as well, because you start creating prototypes (see "Theory U").

Sustained Momentum

MOLLOY: A lot of the challenges you're working on are large scale and long term. How do you support change agents in sustaining momentum over time?

HSUEH: To sustain the change process, it's important to create a collaborative network of systems leaders and then build their capacity. So the work is not just about the work, it's also about people and their capacity. What do you learn from the success and failure of the work? How do you create the learning infrastructure to support change agents on the ground to continue to learn and grow with each other? A big part of it is peer learning, so team members can learn from each

> **The best outcome is that I, as a change facilitator, put myself out of a job.**

other as they launch new projects. They then do action research and bring their learning back to the network.

Developing a network is often overlooked, but it's critical for developing the people who are sustaining the change. Our intention is to identify local leaders, develop their capacity, and then support them in kicking off, for example, the systems mapping work and furthering the iteration of the map. The best outcome is that I, as a change facilitator, put myself out of a job.

Systemic Change Process

The Systemic Change Process involves five main steps (see "Systemic Change Process Map," p. 37):

1. Quiet Convening Process: Once a systemic change opportunity is identified, the facilitators interview stakeholders and map out the system. The goal is to raise stakeholders' awareness of the larger system and their desire to collaborate across boundaries. It is called "quiet" convening because it is better done quietly, to sense the system by listening deeply to stakeholders without expectations.

2. Self-Convening Process: Stakeholders convene to form a shared understanding of current reality, co-create a shared vision, identify leverage points for change, and prototype projects. It is called "self-convening" because by this stage, stakeholders have developed systems awareness and are curious to be in a room with other stakeholders to see the larger system together.

3. Capacity-Building Program: The process of acting on and learning from projects and of evaluating systemic change outcomes helps build systems leadership distributed across the system. Peer coaching, action research, and action learning reinforce systems leaders' collective capacity to self-convene and prototype collaborative projects. The long-term goal is to create a network of systems leaders who have the capacity to sustain the change process on their own.

4. Scaling Process: As the prototype projects mature and networks of systems leaders develop, new ways of being, thinking, and acting become the norm and serve as models for others to replicate and scale up elsewhere in the system.

5. Systems Funding: Traditional funding focuses on the *link* from prototype projects to systemic change outcomes by targeting high-potential prototype projects. Systems-based funding focuses on the *process* of catalyzing self-sustaining systemic change by funding the quiet-convening process, prototype projects, and capacity-building program. The aim is to strengthen the self-convening reinforcing loop until it reaches the tipping point for systemic change.

Systems Investing

MOLLOY: What new directions do you see for your work?

HSEUH: Oh, there are many. One is about content. This touches on my current work. I am really interested in the idea of systems financing or systems investing, that is, how do we finance the transformation of a system? Because in much of my work, we identify levers for change but there is a lack of resources to fund and catalyze those levers.

In the coming decades, there will be a huge wealth transfer to millennials and women, many of whom have a social and environmental consciousness and want to do good with their wealth. They may not necessarily know how. And then in the field of systemic change, there are people who have been working on facilitating change but may not have resources. So I want to bring the two together, using a systems approach.

Currently, impact investing—investment with the intention of generating a beneficial social or environmental impact alongside a financial return—is still quite siloed, in the sense that you fund a particular project or a particular social enterprise; you're not looking at the whole system. The problem is that silo thinking and action leads to silo solutions, which lead to more problems in the future. Peter Senge says, "Today's problem comes from yesterday's solution." So silo investing leads to silo impact. But systems investing creates systems change and systems return.

To do this, you first go through the systemic change process using systems mapping, like I mentioned earlier. You convene stakeholders, and together you identify levers for change. Then you think together about what kinds of financial instruments you can use to catalyze the change, whether they are philanthropic dollars, microloans, impact investing, angel investing, and so on.

My colleagues and I currently have a project in the Osa Peninsula in Costa Rica, which has 2.5%

Systemic Change Process Map
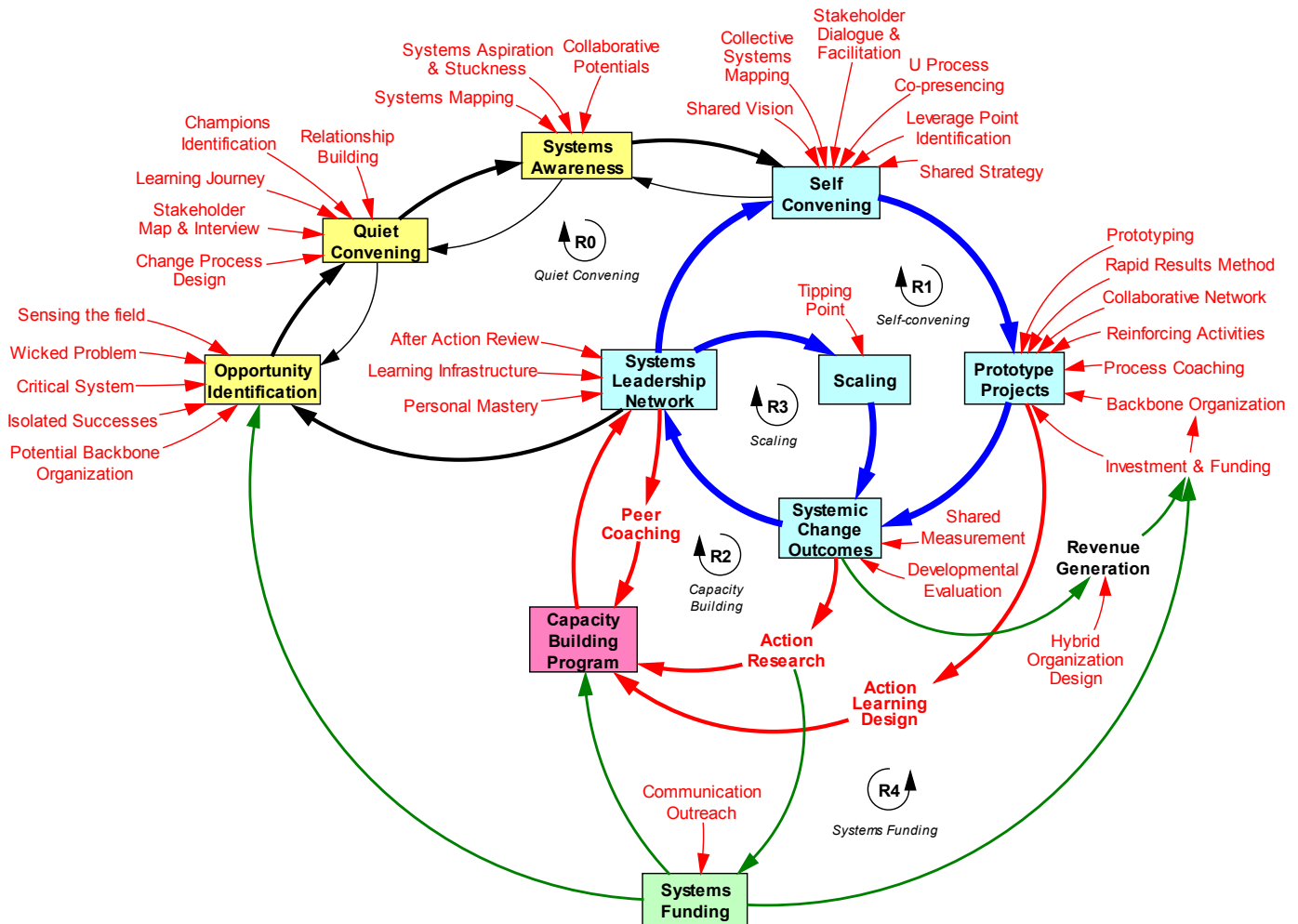
The loops signify stages in the change process. The variables in red are possible interventions for each stage.

Source: Dr. Joe Hsueh, Academy for Systemic Change

of the world's biodiversity. We have gone through the process of mapping the system with stakeholders (see "Regenerative Rainforest Economy Systems Map," p. 38), and we are now in the process of identifying impact investors who are interested in financing the transformation of a regenerative rainforest economy in a systemic way (see "Systems Financing Map," p. 39).

Personal Sustainability

MOLLOY: How do you, as a facilitator and leader of these processes, maintain your own momentum and energy?

HSUEH: I am a part of a firm called SecondMuse. Our intention is to scale up this kind of systemic change work. I was involved in many different large-scale projects at once. Some I advised on, and many I was actually the one doing the mapping and facilitation.

I ignored my own sustainability, though. At the end of the year, I got burned out. It made me realize that I didn't set boundaries for myself. If something sounded interesting, I said, "I'll do this, I'll do that, too." I took on more and more.
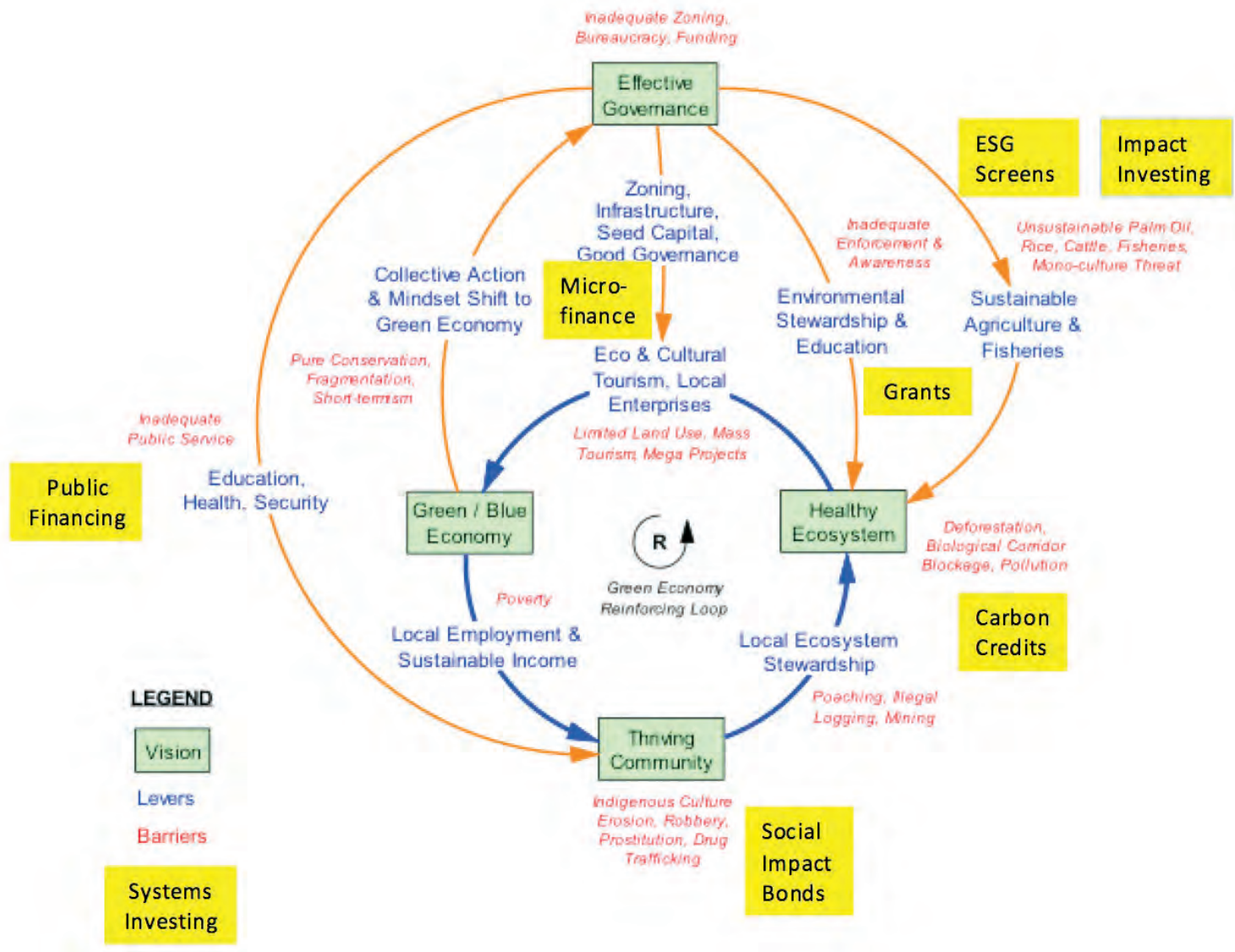
Regenerative Rainforest Economy Systems Map
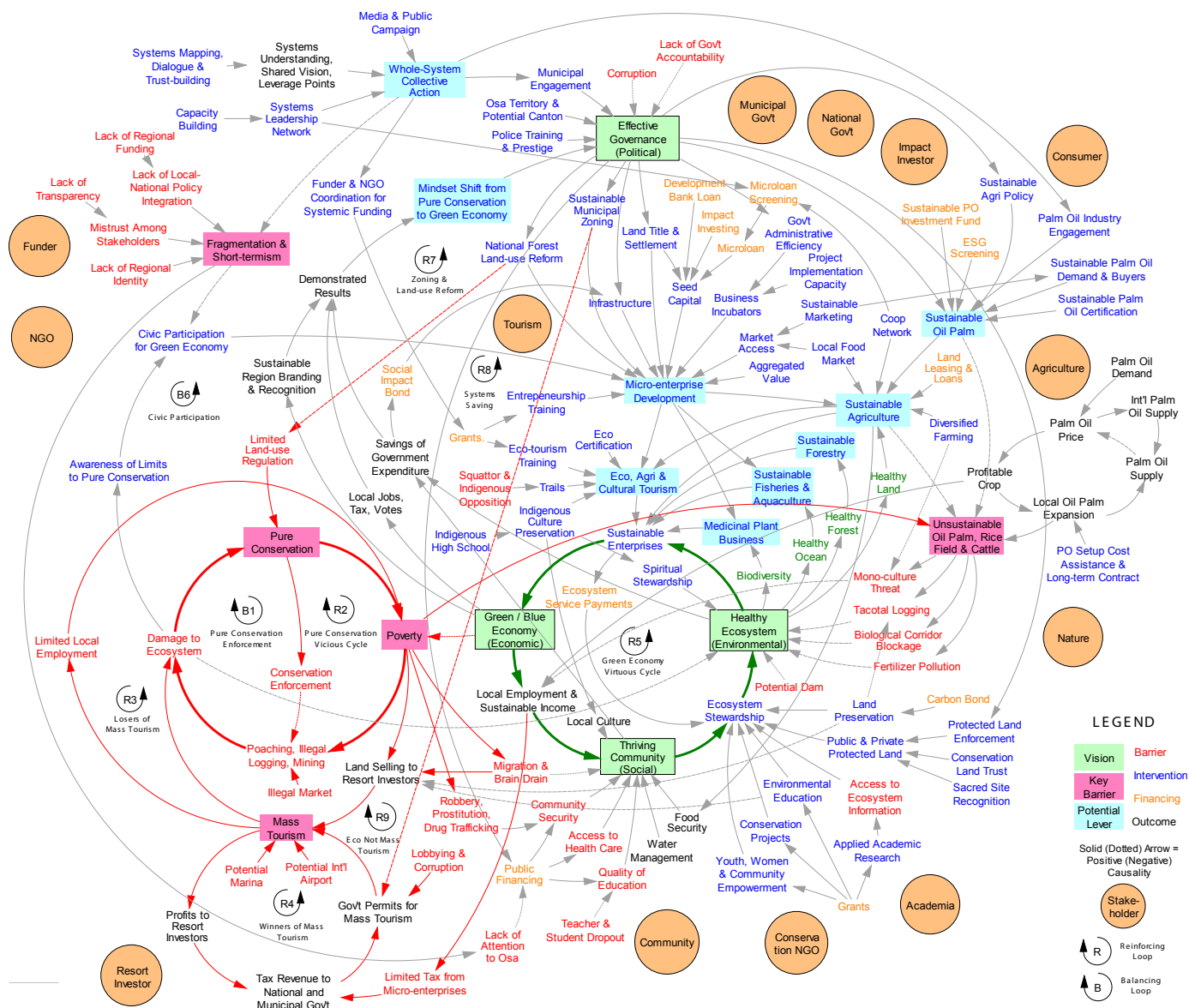
This is the map created by stakeholders in the Osa Peninsula project.

So since last year, I made a conscious choice to be more selective and not take on whatever comes my way. Instead, I'm focusing on work that I see as critically important because it involves a system that can have huge impact. It also has to have as many of the right conditions as possible—a client with a learning orientation and so forth.

MOLLOY: It seems that part of the downside of finding your passion is that it can be all encompassing.

HSUEH: That's right. I'm also learning that by being selective and focusing on a few key things, I can go deeper. What I experienced in the past was very helpful, because it allowed me to touch on many different systems issues. Going forward, I'd like to go much deeper. To create systemic change, one needs to go wide and deep at the same time. ∎

Systems Financing Map

This systems financing map shows a simplified regenerative rainforest economy systems map with various financing instruments linked to places where they could have the most impact.

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Leading with Shakti
Leveraging Feminine and Masculine Energies

NILIMA BHAT AND RAJ SISODIA

Given the prevalence of serious problems in the world, the case can be made that today's hierarchical and individualistic leadership models aren't working the way we need them to. In *Shakti Leadership: Embracing Feminine and Masculine Power in Business* (Berrett-Koehler, 2016), Nilima Bhat and Raj Sisodia introduce what they call "Shakti Leadership," a way of leading that is generative, cooperative, creative, inclusive, and empathetic. While these are traditionally regarded as "feminine" qualities, we all have them. In this chapter, Bhat and Sisodia introduce the three essential capacities of Shakti Leadership: wholeness, flexibility, and congruence.

Nilima Bhat

Raj Sisodia

For life to generate and flourish, you need both the seed and the soil. Put the best possible seed into toxic or depleted soil and it will not grow. On the other hand, even with the most fertile, nurturing soil, a damaged or flawed seed will not develop into anything of lasting value or impact. Both seed and soil need to be addressed to bring about positive transformation in the world. This book is about helping you develop yourself, as the seed, and also as a leader who has the capacity to improve the quality of the soil—the context in which you lead—over time.

Shakti Leadership is a powerful and practical leadership model that consciously leverages masculine and feminine energies to heal, restore balance, and evolve the planet. It represents a synthesis of some of the world's best personal mastery practices and paths. It focuses on developing long-ignored innate feminine
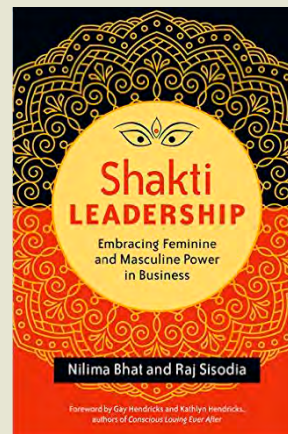
capacities and balancing and integrating them with traditionally masculine resources.

Before we introduce the framework, let's look at how leadership has evolved over the course of human history.

The Roots of Modern Leadership
The roots of modern leadership lie in conflict, territorialism, and the brutal exercise of power. The innate masculine appetite for hunting, conquering, owning, and subjugating appears as a bloody thread running

through most expressions of leadership throughout history. Think of Alexander the Great and his dream to conquer the world; Julius Caesar and the empire of Rome; Henry VIII and his impact on English history. They were considered the great leaders of their time, and naturally they were all men. They are invariably depicted in portraits as very severe, aggressive, unhappy, and serious.

> **Shakti Leadership is a leadership model that consciously leverages masculine and feminine energies to heal, restore balance, and evolve the planet.**

Even in most indigenous cultures and tribes, the mantle of leadership was awarded based on a person's (usually a male's) ability to win wars and protect their people from aggressors. India's grand mythological teaching epic, the Mahabharata, is the story of a great war between two sets of male cousins. The cousins look for leadership lessons on how to rule over their subjects from Bhishma, the venerated patriarch who lies (and dies) on his bed of arrows on a colossal battlefield—a battlefield that wrought such destruction that it brought to an end an entire *yuga* (epoch).

The discourse he gave is still venerated as a "how-to" manual for kingship in peacetime, as is *The Art of War* by Sun Tzu, an ancient military treatise used even today by many leaders. The war has moved from the killing fields to business boardrooms and political chambers.

Of course, there have been leaders in history who did not operate from a dominantly masculine orientation. The leaders who have truly transformed and brought lasting positive change to the world embodied a blend of masculine and feminine virtues and capacities. Think of beloved leaders such as Abraham Lincoln, Mahatma

What Is Shakti?

India's ancient adepts intuited and experienced the existence of a source of infinite creative power and loving intelligence. This same power and intelligence has created everything around us and within us. It is what enables our fingernails to grow and our minds to contemplate the deepest mysteries of the universe. They called that source *Shakti*: the generative, fiercely loving power that fuels all creation and animates consciousness. All of reality is intelligent; it is conscious. It is evolved by its own innate power—which creates, preserves, and transforms itself endlessly.

Think of an exquisite car that's been designed and built to perfection. Without the right fuel, the car is useless. Similarly, consciousness by itself is sterile, still, and inert. *Shiva*—the embodiment of consciousness in yogic traditions—is *shava* (corpse) without Shakti. *Shakti* is the power that fuels everything.

Gandhi, Martin Luther King Jr., and Nelson Mandela. Each had a transformative effect on the world that existed in his time, and each blended tremendous strength with a great capacity for love and care. Lincoln blended masculine traits such as strength of purpose and tenacity with feminine ones such as empathy, openness, and the willingness to nurture others; this capacity was seen as "central to his practice of great leadership."[1] As Leigh Buchanan wrote, "Lincoln's humility and inclusiveness made possible the 'team of rivals' described by Doris Kearns Goodwin in the popular book of that title. Generous and empathic, he made time for people of all stations who approached him with their troubles."[2]

> **The leaders who have truly transformed and brought lasting positive change to the world embodied a blend of masculine and feminine virtues and capacities.**

Contrast the legacies of these leaders with those of despotic twentieth-century leaders such as Hitler, Stalin, Mao, Mussolini, Pol Pot, and others. They represented the worst instances of unbridled masculine energy run amok, and nearly destroying human civilization in the process.

Traditional Leadership Models

The traditional leadership model was designed for combat and competition, with a focus on survival, conquest, and defeating the enemy. Traditional leadership is hierarchical; rank determines power and authority. Decisions are made top-down and follow standard procedures, and drill, discipline, and unquestioned compliance are seen as key to achieving goals. A willingness to sacrifice is seen as key to winning, while ends are believed to justify the means. By some measures, this very masculine leadership model has been successful; it has certainly endured for a long time. The positives associated with masculine leadership include discipline, focus, and extraordinary achievements under duress—but, far too often, it comes at a painfully steep human cost.

Today, the context has changed dramatically and with it our expectations of leadership. Leadership was about maintaining order; today, it's about knowing how to navigate ambiguity. In the past, many things were centrally controlled; today, we operate with peer-to-peer networks. We used to have very limited access to information; now, we have universal and instant access to massive amounts of information, to the point of information overload. Power was closely held and is now distributed; we're moving from ranked hierarchies to unranked "heterarchies." The leader was the unquestioned boss, powerful and controlling; now, the leader needs to be a catalyst, empowering and inspiring.

Most current leadership models are essentially behavioral (telling us how to behave as leaders), and thus operate from the outside in. They require us to develop certain competencies as a leader. Some of them also emphasize values and beliefs, which goes one level deeper—but still not deep enough.

> **Today, the context has changed dramatically and with it our expectations of leadership.**

Getting at the Source

To manifest leadership based on true power, you need to start with the source. You need to understand what that source is, how to get in touch with it, how to harness it, and how to uniquely manifest it in the world. This is a three-step process: step in, step up, and step out. In the process, you source Shakti, embody Shakti, and, finally, manifest Shakti.

- **Step in** is about stepping into your Shakti, awakening to your deeper being: the source within. It is about connecting to your deeper self, and, through that, to the infinite power of the universe.

- **Step up** is about doing: polishing your life and leadership skills, and embodying a natural balance of masculine and feminine qualities to become a flexible, comfortable leader anchored in personal power.

- **Step out** is about being sensitive to the needs of the context and choosing where and how to best serve in

the world. It is about fully manifesting and deploying the Shakti that you've found by asking: What is my unique purpose? What am I here to give life to?

Shakti Leadership

Shakti Leadership is an adaptation of the conscious leadership model developed by a group of facilitators and coaches in India called ChittaSangha (Consciousness Collaborative).[3] The conscious leadership model is about leading with depth, starting from the inside out. It is an approach to leadership that originates from consciousness, the ultimate source of everything. By tapping into that source, we can cultivate a state of being from which comes what we call *presence*—a state in which you're not preoccupied with the past or future but are completely at home in the moment.

When you are not present, you operate with conditioned knee-jerk responses, making unconscious, default choices. When you are fully present, you're able to see and sense things about the situation clearly, act accordingly, and be fully attuned to all its possibilities.

From a state of presence anchored in consciousness, you can readily access and develop the three essential capacities of leadership: wholeness, flexibility, and congruence. These are the critical capacities from which flow all the qualities and behaviors you need to be an effective leader.

Once you develop these three capacities as a leader, all the behaviors and competencies you need to cultivate will be anchored on solid ground. Without such anchoring, no amount of training in "what good leaders do" can have lasting impact.

It matters whether people manifest behaviors from the conditioned ego self or the deeper, true "ground of being." Only leadership that originates from the fertile ground of your consciousness can sustainably generate the outcomes that your organization and people need.

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Only leadership that originates from the fertile ground of your consciousness can sustainably generate the outcomes that your organization and people need.

Without that, it is like planting cut flowers and expecting them to grow.

Capacity for Wholeness

Wholeness is the ability to balance, integrate, and unite all the divided and fragmented parts of oneself. Wholeness is emphasized in all major wisdom traditions. It is about healing the many splits that are within all of us.

We think of ourselves as just one person, but we each carry multiple selves within us. Women have a mother-self, a daughter-self, and also an inner man within. Likewise, men have a father-self, a son-self, and an inner woman within them. We are all human beings and we

are also divine beings; this split, too, has not been reconciled for most of us. To become whole, we need to bring about a kind of "holy family reunion" within our beings. In a sense, it's about becoming your own mother or father as well as your own beloved. We need to learn how to access and express all these selves within us as appropriate.

The Western view of wholeness is *psychological,* reflected in Carl Jung's insight that we have an ego-self and a shadow-self. To become psychologically whole, we need to integrate the two. Jung famously said that this was the apprentice piece in the journey to individuation; the "masterpiece" is to integrate the anima and animus— your masculine and feminine dimensions. When you can hold all those pieces together in a coherent way, you have achieved psychological wholeness.

The masculine tendency is to be more self-oriented, while the feminine tendency is to be more other-oriented. When unconscious, the masculine nature can be selfish; when made conscious, this drive leads to individuation. When unconscious, the feminine nature can be submissive; when made conscious, this drive leads to self-transcendence. Individuation and self-transcendence are two sides of the same coin: the mark of a full-blown presence.

> ## Individuation and self-transcendence are two sides of the same coin: the mark of a full-blown presence.

From the yogic tradition comes the idea of spiritual wholeness—you have to unite the human or ego self and the divine or higher self. It recognizes that you are not only the ego, but also the soul, the *atma*. Ultimately, even the soul has to unite with the supreme soul, *paramatma*.

Chinese or Taoist wisdom focuses on ecological wholeness: balancing complementary energies, the yin and the yang. Chinese medicine is about understanding that your energies need to be balanced with the energies of your ecosystem, which creates a state of health. Likewise, every organ in your body is in a yin-yang energy balance with another.

Becoming a whole person requires us to reclaim our lost parts. The three traditions have worked out pieces of the puzzle; now we can reach for a grand integration. When you become whole, it creates a great sense of joy and releases extraordinary energy—the positive energy of Shakti. The positive and negative poles of a battery are of no use without each other; they need to be connected for energy to flow. Likewise, we are disempowered when we are internally fragmented. Shakti is the energy locked in those poles which can now be released.

Shakti flows and grows from wholeness. Far from being a static, resting state, wholeness is a state of powerful dynamism. When we become whole, Shakti is awakened and active and available in its full power.

Capacity for Flexibility

The second essential leadership capacity is flexibility. Shakti Leaders need to know how to flex between masculine and feminine energy as the situation or context requires. Most of us tend to get stuck in one mode and don't how to cycle to the other. That's the habitual nature of the mind. Yoga and Chinese martial arts and techniques such as Tai Chi and Qi-gong can be quite beneficial to help overcome this; when you make the body flexible, the mind becomes flexible as well.

The bamboo tree is a great symbol of flexibility. It is able to bend and sway as conditions demand, but does not break, no matter how harsh the wind. The bamboo has become central to many sacred traditions for good reason, as it embodies uprightness and tenacity, elegance and simplicity.

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When you make the body flexible, the mind becomes flexible as well.

Being flexible when you are not operating from presence can be disempowering and come across as being weak, indecisive, or lacking personal conviction as a leader. But if you are in presence and holding your center, you can exercise needed flexibility without any loss of power.

Capacity for Congruence
The third leadership capacity is congruence. When we are congruent, everything is lined up: we are centered, authentic, and aligned. Everything comes together and is moving in harmony with one's *swadharma* (a Sanskrit word for the concept of a personal higher purpose, what

one is here to live and be and do). Leaders who are congruent are not pulled in multiple directions. They are aligned with their purpose internally (how they feel) as well as externally (how they act). If you cultivate inner congruence, you will exemplify it on the outside as a highly effective and engaging leader and human being. When a person is congruent, they manifest great integrity; you see them living the truth of who they are, not pretending to be anything else. Congruent people are inspiring to be around; they are powerful beings whose energy comes together into a concentrated force of nature.

Manifesting Love at Work
Love is a word that is finally emerging from the corporate closet. For too long, business has been run purely on self-interest, leaving aside the equally powerful

human need to care. Bringing caring or love into the workplace is an inevitable by-product of embracing Shakti Leadership. In fact, it is already happening at conscious companies—and not just because it seems like a nice thing to do. Ron Shaich, founder and CEO of Panera Bread, believes that "Love is a competitive advantage. When you can give voice to and capture love, you can activate all kinds of things in people which is way different than the model which says they should show up and we will pay you $X per hour. You don't have to make a business case for love."[4]

> **Love is a word that is finally emerging from the corporate closet. What many leaders fail to recognize is that there is a great strength in love.**

For many leaders, "love" seems like something soft—somehow at odds with the steely chill we associate with hardened businessmen. Stakeholder theory pioneer and Darden School professor Ed Freeman is blunt on the subject: "In the academic literature, business is about macho crap. Business theorists are embarrassed to hear people talk about love and care and that kind of stuff."[5]

What many leaders fail to recognize is that there is great strength in love. Love is not the sentimental, pink-hearted cartoon that many envision; it brings people together in a real way. For John Mackey, co-founder and CEO of Whole Foods Market, "Love is the most powerful energy in the world. When you have that, you're not weaker; you're actually a lot stronger. That's the narrative that's missing out there and needs to be told."[6]

There is nothing incompatible between love and capitalism. Fred Kofman, author of *Conscious Business: How to Build Value Through Values* and now vice president at
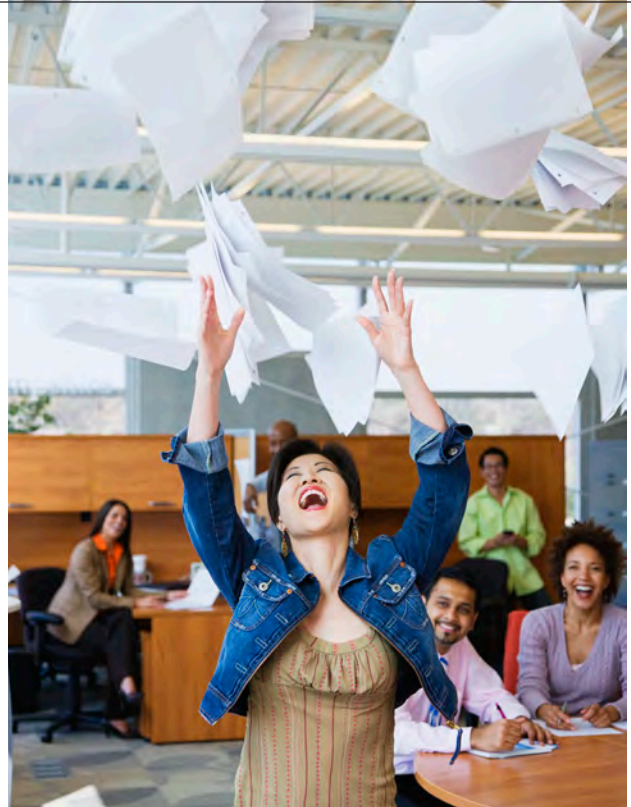
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LinkedIn, has said, "Because love is a competitive advantage in a free market, the companies that best embody love and that best support the well-being and development of all stakeholders will win. They will accumulate wealth and power and size. Freedom privileges those who are willing to offer the most while drawing the least resources from society. It allows loving people to win over those who are less conscious."[7]

Leading from Shakti

Shakti Leadership is not about using people for your objectives, but about serving them and being a good steward of their lives. It's a very different way of looking at leadership. Shakti Leaders don't try to "manage" people; they attract followers because people know that the leader is aligned with a force for good and truly cares about them as human beings.

Why lead with Shakti if you are a conscious person and leader already? Being conscious would imply that the

Shiva consciousness is awakened to a fair degree in you. You are more self-aware and have the ability to deeply reflect on your choices and the impact they have in the world. However, if you wish to bring about real and lasting positive change, you're going to need the agency of Shakti, the power that fuels such change. In yoga, this power is deeply respected, sought, and brought to bear upon situations, for it alone fashions the transformations necessary. We can be highly conscious leaders, but without Shakti we will not be able to achieve the change and transformations needed at these critical times. This transpersonal and higher power alone can bring about the paradigm shifts needed.

As the expression goes, with great power indeed comes great responsibility. Conscious leaders exercise power with great care. Their integrity and intention are tested often; Shakti is theirs only as long as they have self-mastery over their ego and are in selfless service to the greater good.

Shakti Leadership requires that you cultivate deep and consistent presence as a leader. From that place of presence you connect to the Shakti within and are empowered by it. From this Shakti you're able to develop the three essential capacities: wholeness, flexibility, and congruence. ■

ENDNOTES

1   Frank J. Williams, "The Women in Lincoln's Life," in *The Lincoln Forum: Rediscovering Abraham Lincoln,* ed. John Y. Simon and Harold Holzer (Bronx, NY: Fordham University Press, 2002), 25.

2   Leigh Buchanan, "Between Venus and Mars: 7 Traits of True Leaders," *Inc.* magazine, June 2013, *http://www.inc.com/magazine/201306/leigh-buchanan/traits-of-true-leaders.html* (accessed December 2015).

3   We would like to acknowledge the contributions of Vinit Taneja, Vijay Bhat, Arjun Shekhar, Gagan Adlakha, Arul Dev, and Kiran Gulrajani to the development of this unpublished model.

4   Ron Shaich, panel discussion at Conscious Capitalism CEO Summit, Austin, TX, October 12, 2011.

5   R. Edward Freeman, panel discussion at Conscious Capitalism CEO Summit, Austin, TX, October 12, 2011.

6   John Mackey, panel discussion at Conscious Capitalism CEO Summit, Austin, TX, October 12, 2011.

7   Fred Kofman, panel discussion at Conscious Capitalism CEO Summit, Austin, TX, October 12, 2011.

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Nilima Bhat is a facilitator of personal transformation, coaching individuals and organizations in their quest for conscious evolution. She is an international speaker and trainer in organizational culture, conscious business, women in leadership, and self-awareness for work-life balance, as well as Indian wisdom and wellness traditions.

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