



“Did You Drink the Kool-Aid?”

One Teacher’s Personal Journey of Transformation

Victor Lombardi, Rowland Unified School District

In August 2007, the Ball Foundation brought about 40 educators from Rowland Unified School District and Allentown School District together for a retreat outside Chicago. Until these three days of workshops, I had been only minimally involved with Rowland Unified’s partnership with the Ball Foundation. I had little idea about how the partnership would make a difference to my district or to me. At the end of the time in Chicago, I remember being mentally exhausted but greatly inspired on a personal level and excited about the direction our district is taking.

At the retreat I sat around tables with our superintendent and other administrators and teachers and had honest discussions about the complexities of our tasks as educators and how to overcome them by focusing on our positive attributes as a district. During those discussions my opinions were valued as much as those of our superintendent or anyone else.

The uniqueness of this experience may not be understood by anyone not working in schools, but its effect on me was apparent to my colleagues when I returned. I was asked by my principal to report on the Chicago trip at our first faculty meeting. My excitement and optimism, not my usual demeanor during faculty meetings, caused one of my colleagues to pass me a note which read, “Did you drink the Ball Foundation Kool-Aid?”

My transformation, which had begun in Chicago, continued as I read a book given to all of the Chicago participants: *Reframing Evaluation through Appreciative Inquiry* by Hallie Preskill and Tessie Tzavaras Catsambas. I teach at Santana High School, a continuation school that is designed to help students who have fallen behind in credits get back on track and graduate. The reasons students end

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up at Santana vary: poor attendance, a failure to effectively use the skills and talents they have, unstable home lives, teen pregnancy, or gang activity. Nearly every student who comes to Santana suffers from low self-esteem, especially concerning his or her possibilities of achieving success at school.

Preskill and Catsambas' book gave me an idea for helping my students see their chances for success in a more positive light. I have always used a goal-setting activity at the beginning of the school year. This year, however,

I had become a teacher who did what I could in my classroom but who saw nearly all educational systems as failures.

I decided to incorporate an appreciative inquiry activity before the students set goals. I had them interview partners with prepared questions about positive experiences they have had as students, about their best qualities, and about the qualities they have that could make them "good students."

I followed this activity with an exercise in which they imagined themselves being interviewed on the day of their graduation about their phenomenal success and what they had to change about themselves in order to become successful. Then, with all of these positive ideas they had identified about themselves, I had them set some goals. This made

for a noticeably more positive beginning to the school year.

I was still riding high on the wave created by the Chicago meetings when, a few weeks into the school year, I attended a meeting with our partnership team. We were to plan for three dinners at which information about the history and results of the year-long partnership with Ball and the positive energy from Chicago would be disseminated to others in the district.

However, it became clear that it would not be possible to squeeze the intensity of the three days in Chicago and the information we wished to share into a workshop of just a few hours. There were differences of opinion about what should be included and what could be cut while still achieving the main goals. There were even differences of opinion about what the main goals should be. Another planning session was set up, but the first dinner was less than two weeks away.

I was concerned about what would happen next. But I had an "aha moment" two days later, and I sent the following email to all the Ball and Rowland members of the Chicago team:

I am currently reading a book by Joseph Campbell, *The Hero with a Thousand Faces*, which analyzes and connects myths from around the world. ... This morning, I read a section about the return of the hero from the world of the gods, from the belly of the whale, from seeing the Holy Grail, etc. When the hero returns to the

everyday world, he or she has difficulty trying to figure out how to explain what he or she has experienced, but can do so if he or she is confident in the eventual outcome rather than anxious about how the message will be received.

This reminded me of something said by Stephanie Pace Marshall [at our meeting in Chicago], “Leaders must create conditions that will allow others to enter an unfamiliar story.” ... And this is the “aha”: **We** are the heroes who have been to the holy land of Chicago (or at least a suburb) and we have seen the holy grail and have returned to help others cross over by creating the conditions for the others to begin their journey, by breaking their chains (the belief that things will never change or get better, or that action is more important than thought), and we can best do so not in one night, but by living the message (in our classrooms, in our interactions with peers, “superiors,” and “underlings,” etc.).

I was a passionate teacher before my involvement with the Ball Foundation. However, having

worked in education in three different states and to an extent bought into the societal feelings concerning the failure of American education, I had become a teacher who did what I could in my classroom but who saw nearly all educational systems as failures.

My involvement in our partnership with the Ball Foundation has reawakened me to the possibilities of working within a system to achieve educational greatness. The simple but vital methods of the partnership—bringing all stakeholders to the same table and focusing on appreciative inquiry—are, sadly, unique, but powerfully effective. I look forward to the hard work yet to come as all stakeholders in the Rowland Unified School District together chart a course overcoming the many obstacles facing modern education to achieve even greater success. ■



The author, far right, participates in a round-table discussion with colleagues from Allentown School District and Rowland Unified School District at a Ball Foundation partnership meeting outside Chicago.

Principles for Building Organizational Capacity for Change

Rex Babiera

This article is adapted from a presentation given at the 2007 Annual Conference of the American Evaluation Association by Srik Gopalakrishnan, Michael Palmisano, Rex Babiera, and Barbara Iversen.

In the past eighteen months, the Ball Foundation has designed and implemented a baseline assessment of organizational capacity with its partners, Allentown (PA) School District and Rowland (CA) Unified School District. (See “Beginning a Transformative Change Process,” *Review*, Spring 2007.) This assessment was grounded in the following principles that reflect the foundation’s approach to building sustainable organizational capacity for change: using an adaptive approach, working from an asset-based perspective, using inquiry-driven processes, and engaging stakeholders. Having engaged in this process, our partner districts are primed to use inquiry-driven and evidence-based decision-making in all facets of their work.

Using an Adaptive Approach:
Co-create solutions focused on specific context and needs; don’t predetermine interventions.

The foundation does not bring pre-determined programs to implement in school districts; it supports and enhances its partners’ capacity to learn and reach the goal of high literacy achievement for all students. In the baseline assessment process, the school districts generated literacy areas of inquiry that were relevant to them. That is, they determined the areas about which they wanted to learn more and that would be the

most powerful in helping them ensure high literacy achievement for all students. Examples included literacy instruction, professional learning, and instructional leadership.

Honoring the adaptive approach principle, the foundation then provided outside expertise based on what came up internally as areas of inquiry. For example, the foundation asked the districts to consider additional areas of inquiry such as family engagement to support students’ literacy and a broader concept of what constitutes their system.

Working from an Asset-based Perspective: **Identify and build on what’s working and what’s possible, not what’s wrong.**

Many interventions implemented by school districts start from a needs assessment or a gap analysis. This approach is fundamentally deficit-based, looking at what’s broken and how to fix it. The foundation uses an asset-based perspective not to ignore problems, but to create a positive energy around what is working and why in order to achieve more success. In the baseline assessment process, the foundation and the districts used appreciative inquiry to identify where good things were already happening and to dream what it would look like if these were institutionalized across the district.

Using Inquiry-driven Processes:

Ask questions that matter; seek relevant information; plan and implement actions with ongoing feedback.

In a complex system such as a school district, the ability of the organization to reach its goals depends on its capacity for learning. The foundation uses inquiry-driven processes to support both individual and collective learning that is targeted to improving professional practices. These include instructional practices, organizational practices, and leadership practices. The baseline assessment itself was a broad inquiry framed by three questions (see box at right). However, smaller, focused inquiries within the baseline assessment were used to orient participants to the partnership between the foundation and the district, to identify assets, and to make meaning from data generated across the system.

Engaging Stakeholders:

Involve the whole system to build on collective knowledge and foster ownership for improvement efforts.

The foundation believes that achieving transformational change requires a systemic, rather than a programmatic or piecemeal approach. To that end, partnerships between the foundation and school districts involve stakeholders that reflect the whole system. Because it was neither practical nor desirable to have every person in the system be engaged at all times, the work proceeded in a regu-

Inquiry Questions for Baseline Assessment

1. To what extent and in what ways do stakeholders come together to learn with and from one another?
2. To what extent and in what ways do stakeholders create powerful learning experiences that result in high performance for all students?
3. What systemic factors enable stakeholders coming together to learn with and from one another to create powerful learning experiences that result in high performance for all students?

lar rhythm of small-group meetings to large-scale engagements and back. In the baseline assessment process, a leadership team of approximately twenty educators representing a cross-section of the district was formed to design and implement the overall process. However, at various points in the process, broad stakeholder engagement (large numbers of educators, parents, students, and community members) was sought. In this way, new connections were made within the system and existing relationships were strengthened.

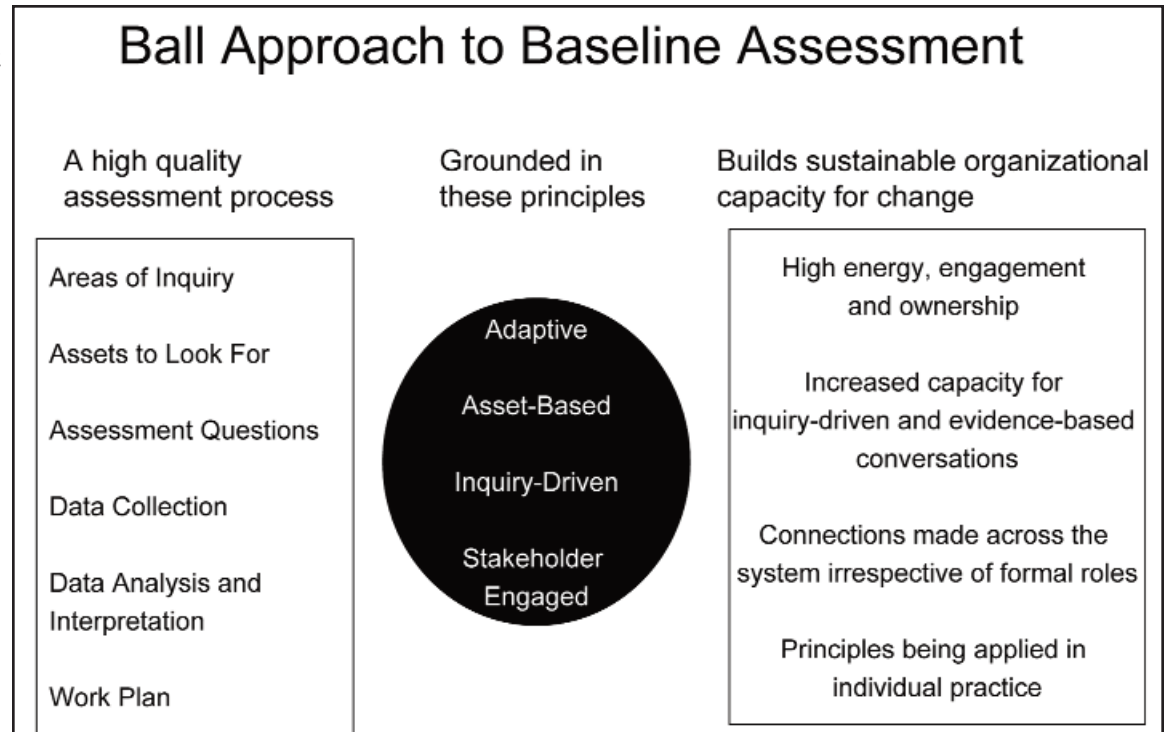
As noted, the baseline assessment process was grounded in the above principles in order to build sustainable organizational capacity for change. What happened during the process was a successful start to building this capacity. The foundation has observed four important results from the first eighteen months of

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Figure: Summary slide of presentation given at American Evaluation Association 2007 Annual Conference



engagement with Allentown School District and Rowland Unified School District.

First, district stakeholders exhibited high energy, engagement, and ownership throughout the baseline assessment process. The more district stakeholders take ownership of this work, the more likely it is that improvements will be sustained and grow beyond the life of the partnership.

Second, within certain individuals and groups in the district, there is increased capacity for inquiry-driven and evidence-based conversations. Individual and collective capacity for inquiry will increase the organization's ability to learn.

Third, connections are being made across the system irrespective of

formal roles. In systems that are typically hierarchical and often reinforce isolation within schools and classrooms, connecting people across traditional boundaries increases collective knowledge and the ability to act on that knowledge.

Fourth, individual practice is changing. That is, educators in the district are themselves applying these principles in their own work. Classroom teachers have used appreciative inquiry with their students. Principals have designed the opening of the year at their schools with processes that engage stakeholders. Thus, a high-quality assessment process grounded in these principles can indeed build sustainable organizational capacity for change. ■

Ask an Educator

The Education Initiatives staff of the Ball Foundation recently asked educators from Allentown School District, **“What has changed for you as a result of the Allentown partnership with the Ball Foundation?”**

Chris Tempro

Chris Tempro is a teacher at Trexler Middle School.

Working in the Allentown School District (ASD) partnership with the Ball Foundation has given me a new lens through which to view and reflect on my own classroom practice. I was almost immediately inserted into the role of not just learner, but co-creator of whatever the product of our partnership will become. As part of the design team for our first partnership meeting in Chicago in 2006, I helped design and facilitate some sessions that began the work of the partnership.

This experience, and much of the first year of our partnership work, was both energizing and challenging. I was constantly energized by the process itself – being in conversations with caring and committed professionals, across roles, about how to best serve our students. What was challenging was that the ultimate goal of the partnership, increased literacy in ASD, was just beginning to take shape and become visible.

As a teacher, I know that any initiative will only be effective if it actually impacts instruction in the classroom. Through my experiences in co-creating this initiative with my colleagues, I have strengthened my belief that my students need to be co-creators of their educational experiences as well. I have used some of the same

processes that engage and focus adult conversations in the partnership with my students in my classroom. Not surprisingly, these early adolescents are just as energized as adults are by the opportunity to brainstorm, share and discuss ideas in flexible groups using structures like the World Café. ■

Michele Ryan

Michele Ryan is the principal of Sheridan Elementary School.

The Ball Foundation has cultivated a culture and climate within ASD that has planted the seeds for transformational change. What has been extremely exciting is being part of a team that has begun to build a framework that will structure sustainability of improved student achievement. This experience has enabled me to recognize that my work is to create conditions in which all stakeholders develop a shared understanding of our mission. Reaching our goal of quality literacy instruction for all students is possible through shared leadership.

I learned specific team-building skills that permitted me to create the setting for my staff to own the leaderful behaviors that enabled us to begin the 2007–2008 year in a powerful, engaged way and with a shared purpose. As we continue our work, we are finding that our time together is focused and meaningful. What we create together is owned by all. ■

The Ball Foundation is a family-funded operating foundation based in Glen Ellyn, Illinois. Established in 1975 by G. Carl Ball and Vivian Elledge Ball, it conducts programs in two areas: Career Vision and Education Initiatives. *Review*, the newsletter of Education Initiatives, is published three times a year. If you have any questions or comments please call 630.469.6270 or e-mail Rex Babiera, *Review* Editor, at rbabiera@ballfoundation.org.

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