Systems Stories

The Evolution of a Shared Vision

by Mary Scheetz and Tracy Benson

"We have most often conceived of vision as thinking into the future, creating a destination for the organization. What if we saw a field of vision that needed to permeate organizational space, rather than viewing vision as a linear destination?"

—Margaret Wheatley
Leadership and the New Science

Margaret Wheatley describes vision not just as a destination but as a *field* that permeates the organization, affecting all employees who bump against it. As a result, their behavior is shaped by that influence, creating actions congruent with the organization's goals. If there is no such field of vision, no expectation of desired behavior can be held.

Vision is a strong part of our day-to-day lives at Orange Grove Middle School in Tucson, Arizona. People who walk onto our campus can sense that something is different. Things seem to happen with minimal effort and a great deal of joy. We find that new students are positively affected by the culture in a short period of time. If they are coming from a situation in which they've exhibited negative behavior, these habits seem to diminish once they arrive on our campus. The same thing has happened with the staff—we have minimized some of our negative habits because the power of our vision stirs us along and better enables us to produce the results we want.

When we describe our efforts at Orange Grove, we usually speak about the "evolution" of a shared vision because we believe that attaining a vision is a never-ending process. For us, the process has evolved over the past five years, and we have moved through several stages of activity (see "The Evolution of a Shared Vision"). Each of these stages has flowed naturally into the next; yet, as with any other organization, we always have new people and new structures coming into our system. Therefore, we must continuously revisit our evolving vision in order to incorporate those changes.

From Personal to Collective Visions

When we first began the process of evolving a shared vision, we chose to start with personal vision based on what we had learned from Peter Senge and others. We therefore wanted to find out what every person in the organization—teachers, custodians, librarians, educational assistants, secretaries—thought our school should accomplish. Specifically, we asked people to reflect on what an ideal school should accomplish and what would it look like.

We passed out index cards and asked everyone to write down words and phrases, draw pictures, or do whatever else would help them formulate their vision. The responses we received included: "All people are treated with respect;" "Individual differences are celebrated and addressed;" "Students and staff are encouraged and supported to maximize their potential."

Once we had gathered everyone's personal visions, we found that it is extremely difficult to go from simply putting these vi-

sions together to creating a truly shared vision. Sharing assumes common mental models, common understandings, and common values, and it takes a long time to get to that point. We use the term "collective vision" to describe this stage in between personal and shared vision. At this point, we collected everyone's personal visions and formulated a long list, and then looked for gaps or conflicting images, which we then discussed. We combined statements that seemed to cover the same concept, and added areas not previously addressed. Once we had refined and filled in our list, we felt that it represented almost everything that we as a group would want to accomplish if we had the time, energy, and resources.
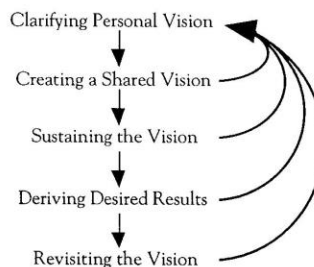
Building Shared Vision

We then began the process of building our collective vision into a shared vision. We believe that creating a shared vision means developing shared understanding of what the collective statements represent. Investing time in defining and clarifying the visions makes it more likely that we will actually commit to accomplishing them.

The first thing we did to give meaning to the vision was to put people together in small groups and ask them to create images of what their vision represented. We purposely put people together who don't necessarily share the same experiences or mental models. We asked each person to share aspects of their personal vision. Then we asked

The Evolution of a Shared Vision

Clarifying Personal Vision
↓
Creating a Shared Vision
↓
Sustaining the Vision
↓
Deriving Desired Results
↓
Revisiting the Vision

Evolving a shared vision is an iterative process that consists of distinct phases of activity.

the group to come to consensus about the things they could agree on, and to share them with the larger group.

We saved these sessions on a videotape because they are probably some of the most creative pieces our staff has ever done. We had representations ranging from a spoof on the game show "Wheel of Fortune," to a symbol of the school in the form of a recipe that contained all the necessary ingredients for a healthful, delicious stew. The staff felt that this exercise was fairly safe because it was an abstract representation about what the vision was. That was important in the beginning, because sharing personal visions is a pretty risky thing to ask people to do.

Committing to the Vision

At some point we have to decide how committed we are to making the vision happen. In order to gauge our level of commitment to the different aspects of our vision, we had the staff do some voting. First, we had a dialogue to clarify what we meant by each statement. Then we went through the items on our collective vision list and asked people to declare publicly if they were enrolled, committed, or not in agreement with that aspect of the vision.

We used a rock climbing metaphor to communicate the difference between "enrollment" and "commitment": if we were rock climbing, would you be willing to climb up the mountain (enrollment), or would you also be willing to pull the rest of us up if we had trouble making it (commitment)? We differentiated between the two because we recognize that it is not realistic or wise to expect all individuals to be at the com-

mitment level of every aspect of a vision.

It was a quiet session—it was not the time for dialogue or discussion, but for making personal decisions. There may have been individuals who did not vote for any items, or people who voted for only a few things. That was okay. We just wanted to get an initial assessment: we felt that if only two or three people were enrolled or committed to a particular item, it would probably not be part of our shared vision.

Clarification

We termed our approach to the visioning process the "Lego" approach: you don't really know what it's going to look like, but you keep building and then see what evolves. We call this "successive approximation:" we take a step toward our vision, gather feedback, assess it, and then decide the next step. It's a very recursive process.

One of the things we did to take advantage of the "Lego" approach was to create a structure called "vision lunches," or what Margaret Wheatley calls "force field meetings." We gathered together over lunch in our "shared vision room" to discuss one or two of the topics from our vision list. We asked people to bring in articles, cartoons, and examples from their classroom or work areas and be ready to talk about what each concept means to them. These sessions were meant to clarify the words we were using to describe aspects of our vision, and they were crucial for surfacing different interpretations and perceptions about what the words meant.

The talk was rarely easy. The things that people brought in as examples weren't always positive, but they helped clarify our thinking. For example, one of our vision statements was "ability to question." Some people were concerned about asking questions that weren't tactful, or that might not be asked at the appropriate times. In order to address this issue, we clarified our

expectations about what it meant to question in an appropriate manner. We used these opportunities to flesh out our vision. Sometimes the wording on an item changed, but it didn't really matter as long as we all walked out knowing what we meant.

The other important part of the clarification stage was gathering feedback on how we were doing in our everyday behaviors. This was done through staff and parent surveys; parent, student, and staff meetings; and our advisory period (in which we talk to students and parents to receive input from them about various situations and activities in the school). We then used this information to try to help us communicate, clarify, and revisit different aspects of the vision.

One important piece of feedback we received from some parents was that they were not sure we were challenging every child as we had envisioned. That surprised the staff, because we felt that we were truly challenging all students. At this point, we could have argued about who was right or wrong, but that didn't really matter. Given our vision, we felt that we needed to come up with a response to that feedback which would satisfy us, be consistent with our vision, and produce the outcome that parents wanted.

We looked at the feedback, first in groups and then individually, to see what were doing in class to challenge every student. Once we put all of that data together, we helped deliver coaching sessions with each other about better ways to achieve that vision. The things that have been implemented as a result are absolutely incredible. The staff members are communicating with students and parents more clearly and consistently about opportunities for more complex, engaging work. Teachers have added challenging assignments, become more aware of individual differences, and are getting more positive feedback from all involved.

Organizational Maturity

One of the wonderful results of our visioning process is that we have achieved a certain level of organizational maturity. This notion of "organizational ma-

Elements of Organizational Maturity

- Consistency in Articulation and Behavior
- Willingness to Assume Personal Responsibility
- Challenges Seen as Learning Opportunities
- Ability to Communicate and Collaborate
- Consideration of the Ideas and Beliefs of Others

turity" comes from one of our Orange Grove citizen advocates. He describes the difference between sophistication and maturity as the difference between being exposed to lots of ideas versus being able to truly deal with them, both internally and externally.

We believe that organizational maturity comes from having a meaningful shared vision, and from constantly evolving that vision as you develop your ability to understand and deliver it. An important characteristic of organizational maturity is consistency in articulation and behavior (see "Elements of Organizational Maturity"). We believe that you should be able to come to Orange Grove and ask anyone the same questions about our purpose and get virtually the same answers. By this we don't mean a rote response, but rather that person's individual interpretation of what our vision means to him or her. This is particularly wonderful when it is a child telling an adult what they believe Orange Grove is about. The more consistent our message is throughout the school, the more mature we consider our organization to be.

Another characteristic of organizational maturity is a willingness to assume personal responsibility. As administrators, our jobs are now filled with tasks that we hadn't done before, or that one might not normally associate with being a school administrator. Actually, we feel freer to do the things we think are important because of the degree to which people at Orange Grove take personal responsibility for doing whatever needs to be done. This means some days we scrub desks, sometimes the custodian runs meetings, and some days the secretary tells us about something that we ought to do differently.

For example, at a recent meeting, the educational assistants mentioned their concern that we were going to use as much paper by the winter holidays as we normally use in a year. When Mary, as principal, offered to write up a memo about the issue, they decided the message should first come from them to the four teachers with whom they worked. Another simple example of personal responsibility occurred when a teaching team was experiencing some problems.

Mary sent a memo to each of the people, asking to meet individually with them to share their perceptions. As soon as she had sent the memo, the four people were in her office, saying that they felt they should discuss the issue among themselves. Within 12 hours, it was resolved. *That* is organizational maturity.

Expanding the Field

Margaret Wheatley says that in a field view of organization, clarity about values or vision is important, but it is only half the task. Creating the field for dissemination of those ideas is just as essential. The field must reach all corners of the organization, affect everyone, and be available everywhere.

This is our ongoing work at Orange Grove as we engage all staff, parents, and students in clarifying and revisiting the vision. Our challenge is to create such a field and then sustain it—by involving all players, incorporating community-building activities, and providing an environment of support, respect, and trust. Only then will the vision statements move off the page and into the corridors, seeking out every employee and every recess of the organization. **Q**

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The Resource Library

The following resources, compiled from The Systems Thinker, are available as part of The Learning Organization Resource Library catalog, offered by Pegasus Communications, Inc. Call (617) 576-1231 to order or for more information.
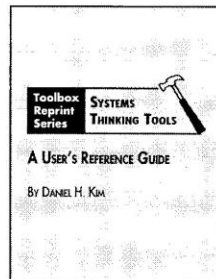
Systems Thinking Tools: A User's Reference Guide

Part of the *Toolbox Reprint Series*, this booklet is the newest reference guide for understanding and applying the tools of systems thinking. From causal loop diagrams to management flight simulators, this collection of over 20 articles introduces the basic tools of the field and shows you how to begin using them. The handy reference section contains guidelines such as "The Do's and Don'ts of Systems Thinking on the Job" and further resources to explore. *55 pages, $15.00*

Reflections on Creating Learning Organizations

How can organizations create long-term changes that will produce sustainable results? Are there better ways to structure information flows to promote organizational learning? How do defensive routines hamper learning? The articles included in this anthology begin to explore the questions managers face as they challenge the most fundamental assumptions about organizational processes. With a strong foundation of theory balanced with case examples, *Reflections* will help you begin to understand the challenges and stumbling blocks we all face in creating today's learning organizations. *120 pages, $17.95*