SoL International Forum in Vienna 2005 "Symphony of Innovations"
Case Study: Beaufort County School District, Beaufort South Carolina, USA
Written by Micah Fierstein (micahfierstein@earthlink.net)

Ongoing Discussion "Thought Piece"

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The attached case study was presented at the 2nd Society for Organizational Learning Global Forum, in Vienna Austria. The title of the module was "What is the DNA of Education as a Living System?" My case study examines a three-year "learning initiative" at the Beaufort School District School District in Beaufort, South Carolina.

The School District's question is about exploration: "How do you migrate a school district that lives in a mechanical paradigm to a living systems model that harnesses personal continuous leaning and personal aspiration?"

This initiative uncovered four components critical to this migration:

Cognitive Tools: These are thinking frameworks (schemas) that help individuals reflect on their thinking and interactions and engage in dialogue with others about their discoveries, questions and ideas. These cognitive tools to have two purposes: 1) they create a common langue to speak about the learning, problems, aspirations, and innovation; and 2) they help create rituals that maintain intention.

Parallel Learning: Promoting new thinking alone is not sufficient to sustain cultural change   because the gravitational pull of organizational and personal habits is so relentless. The learning design for "Schools that Learn" works on two parallel fronts – living the experience of a learning community and learning specific tools that build such communities.

Learning Map: This spiral learning method integrates personal practice and reflection with community dialogues to build capacity on the personal and collective level simultaneously.

Application Project: This culminating project uses a model called *The Systemic Framework for Understanding Persistent Problems and Creating New Results*. This project is a migration strategy that facilitates participants seeing persistent problems through the lens of a living system and creating intervention strategies that move a vicious cycle to a virtuous one. This project also promotes 1) a deeper understanding and integration of the tools 2) creates seedlings of innovation in the district 3) and creates a methodology to measure the results.

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Introduction	The road to the _Schools that Learn Initiative_ began with a haunting question posed by Edna Crew the Assistant Superintendent of Beaufort County School District Assistant (BCSD): "With hard working administrators, teachers, support personnel, and excellent facilities with sufficient funding, why do our students score lower on academic achievement tests as compared to other districts? Seeking insight into this paradox eleven district leaders attended the Institute for Authentic Leadership in Halifax, Nova Scotia. Here they engaged in the module _Empowering System Change in School Communities_. .
	The experience triggered an intense interest in exploring how learning organization principles, disciplines, tools and concepts could increase their capacity to be a more purposeful and effective schools system. That emphasized relationships.
	Their curiosity produced a partnership with The Change Institute to create a learning initiative to build the individual and collective capacity in the five disciplines of mental model, term learning, personal mastery, shared vision and systems thinking

Student Population	The Beaufort Country School District (BCSD) is located on the coast of South Carolina. It has 2,700 employees, 18,500 students which come from a diverse ethnic and socio-economic population.

The Habits That Existed	❑ **Push And Back Fill:** Managed perceptions to buy time ❑ **Site Based Structure:** independent & innovative action ❑ **High Visibility Quick Fixes:** acting with urgency ❑ **Favored Status:** Personal relationships matter most ❑ **Non Collaborative Culture:** Internal competitiveness ❑ **Resource Dependent:** Resources are the constraint ❑ **The Blame Game:** Students create the limits to success ❑ **Creative Avoidance:** Sweeping issues under the rug

Initiative	The core of this initiative is a 7½ -to 11-day interactive cohort seminar building individual and collective capacity in learning organization principles, disciplines and tools. The participants begin with a three day intensive. Their learning continues with four, one-day sessions spaced out once a month. Between sessions individuals practice and integrate specific learning organization tools with their work. Insights are shared through email journals, sent to learning partners and learning circles.
	Day seven focuses on the development of an application project which uses the concepts and tools to the break a reinforcing vicious cycle that is negatively impacting student learning. Participants identify an area of concern within their sphere of influence. They then describe the symptom and write a focusing question. From this question they build a systems loop, analyze the loop and then choose a link to break. The next step is to identify the old mental model, a new mental model and a new behavior to shift the vicious cycle to a virtuous one. Lastly, they create an intervention strategy and choose organizational tools that support their plan. Each person then runs their intervention. Cohorts reconvene 60 days later to share their results. (400 individuals have take the seminar.)

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Desired Outcomes	❑ Build sustainable capacity: not a quick fix ❑ Institutionalize new habits to build our collective capacity to learn how to learn. ❑ Improve the quality of our interactions & thinking: where the leverage is. ❑ Create a framework and space to build stronger relationships: build trust and use dialogue to create systemic solutions for student success.

Learning Objectives	❑ Use the Five Disciplines to impact relationships and improve student outcomes and to;
	    o Develop an understanding of how our thinking drives our habits and behaviors (Mental Models).
	    o Foster a commitment to a common purpose (Shared Vision).
	    o Understand and leverage the dynamic and residual nature of the connections between the staff, students and community (Systems Thinking).
	    o Transform our skills of working and thinking together. (Team Learning).
	    o Take personal action to move from current reality towards a shared and personal vision (Personal Mastery).
	❑ Use the "Toolkit" to create and sustain a learning organization in the classroom, school, district (and community).
	❑ Understand and leverage the value and impact of the learning organization principles.

What I have learned - Superintendent	❑ Personal Learning
	    o Being proficient isn't the goal.
	    o The goal is continually being aware that I am learning.
	
	❑ How it has changed my behavior
	    o I don't jump to solutions for people's problems.
	    o The five disciplines (mental models, team learning, personal mastery, shared vision and systems thinking) are the lens I use for my work and life
	❑ Influence and Impact on others
	    o Better job at connecting the value and importance of people and relationships to our work.
	    o Quality of interaction is what is important.
	❑ Learning about the intervention
	    o You can't presume or assume anything.
	    o Learning is a messy business

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What I have learned - Principal	❑ Personal Learning 　　o I feel safer in sharing my thoughts. 　　o I have a greater interest in working through an idea. 　　o I feel less pressure to have the answers. 　　o When I clean up a mess that others have created, I think about what could be taught and learned. 　　o I look for learning as much as for fault or blame. 　　o I listen more actively and honestly. ❑ School 　　o Authenticity takes priority and forces members to question habits that have always been acceptable. 　　o Everyone's ideas have value regardless of the person's position. 　　o Some ideas should be published even if the value is not obvious. 　　o Living through the sacrifices that members make for the community create an intangible yet firm bond among members and a responsibility to take care of all. 　　o
What I have learned - Teacher	❑ Sharing a vision and purpose breaks down barriers and creates new definitions for relationships, "What I do affects others." ❑ Responsibility for safety is expanded from physical to personal and professional. ❑ "We are learning that fixing a problem does not usually resolve a systemic condition of the school." ❑ Building leadership capacity is outside comfort zone: "Just tell me what you want me to do." ❑ School that Learns complicates the roles and expectations for teachers. "Have we become administrators?"
Next steps for the District.	❑ Threaded Leverage – The Core Bundle: Leveraging the organizational learning tools, disciplines and principles into existing School District Initiatives: ❑ Tipping Point: Who are the key influencers: ❑ Sustainability - Leadership Capacity ❑ Differentiated Learning Design
Paradoxes & Conundrums	❑ The practice of organizational learning tools can increase one's hopefulness that schools can change, yet it can foster unproductive anger and resentment towards leaders and teachers that "don't buy in." ❑ What is the intersection between individual learning and organizational learning? . ❑ The paradox of increasing personal capacity verses increasing the number of individuals who go through the program. ❑ Seeing the gap between espoused theory and theory in action often requires an outsider, yet the outsider in the organization is often is scared to speak up.