WELCOME & CHECK-IN EXERCISE
CHECK-IN EXERCISE (15 minutes)

In groups of about 4 participants, identify a notetaker and follow the prompts below.

If you had an Action Commitment related to the From-To Shift after the last VC mtg:
1. Tell your group what your Action Commitment was.
2. Describe how it went.
3. Share and document 1-3 takeaways from your experience.

If you learned about the From-To Shift from a fellow Vision Council member after the October meeting:
1. Tell your group who shared it with you.
2. Describe your reaction.
3. Share and document 1-3 takeaways about the From-To Shift.

Group Discussion: Do you have any input on the From-To Shift (refinements to suggest? additions to suggest?, keep as is?, etc.)
MEETING PURPOSE
Further strengthen the Vision Council’s capacity to lead the “From-To” Culture Shift and develop work plans/next steps to further the prioritized FFPSA implementation opportunities.
1. The Vision Council is informed on stakeholder reactions to the draft of the “From-To” Culture Shift.
2. Action plans are drafted in support of prioritized Family First implementation activities.
3. The Vision Council is further equipped to be instruments of systems culture change.
4. Each Vision Council member is committed to specific action steps in support of the systems culture shift and FFPSA implementation.
**CHANGE LEADERSHIP:** Engaging Thought Leaders and Leadership Teams to Prepare for Family First Funded by the Mid-Iowa Health Foundation

**VISION COUNCIL MEETING**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 AM</td>
<td>Welcome and Check-in Exercise</td>
</tr>
<tr>
<td>11:00 AM</td>
<td>FFPSA Implementation Support: Action plan development</td>
</tr>
<tr>
<td>12:15 AM</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>12:30 PM</td>
<td>Practical tools and actions to shift the systems culture, Part 1</td>
</tr>
<tr>
<td>1:45 PM</td>
<td>Stretch Break</td>
</tr>
<tr>
<td>1:50 PM</td>
<td>Practical tools and actions to shift the systems culture, Part 2</td>
</tr>
<tr>
<td>2:35 PM</td>
<td>Check Out/Review Action Commitments</td>
</tr>
<tr>
<td>3:00 PM</td>
<td>Check Out / Adjourn</td>
</tr>
</tbody>
</table>
Who you shared the From-To Shift with or learned about it from.

One key takeaway from sharing/learning about the From-To Shift.
CHECK-IN EXERCISE

Group Report Out

Briefly describe key input your group has for the From-To Shift.
FFPSA
Implementation
ACTION
PLANNING
WORK PLANNING GRID

Change Leadership Vision Council - Work Plan – December 4, 2019

<table>
<thead>
<tr>
<th>FFPSA Implementation Support Item:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
</tr>
<tr>
<td>------</td>
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<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Milestone(s) to Keep In Mind</th>
<th>Timeframe</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What one-time funding could support</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

What else to prioritize for Vision Council Support of FFPSA implementation? (Identify using “Priorities for VC Support of FFPSA implementation”):
FFPSA IMPLEMENTATION:
Small group report out & group discussion
LUNCH BREAK
FROM-TO SHIFT:
Practical tools and actions to shift the system culture,
Part 1
What Is Culture?

**ACCOMPLISHED**
Culture is the spoken and unspoken ways things are accomplished in a group.

**ACTION**
Vision and mission in action.

**BEHAVIORS**
Group and individual behaviors that facilitate or restrict progress towards a goal.
HOW the work is ACCOMPLISHED
Highly visual and consistent throughout the Integrated Diagnostic System.

It breaks the factors underlying performance down into 12 ways or “styles” of thinking, behaving, and interacting.
# The Culture Balancing Act

<table>
<thead>
<tr>
<th>Aggressive/Defensive</th>
<th>Constructive</th>
<th>Passive/Defensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro-managing</td>
<td>Setting Expectations and Holding Accountable</td>
<td>Not addressing poor performance</td>
</tr>
<tr>
<td>Always disagreeing to avoid changing practices or appear incompetent</td>
<td>Debating ideas to arrive at a visionary solution</td>
<td>Agreeing with the first idea/avoiding debate</td>
</tr>
<tr>
<td>Not communicating anything to stay ‘in power’</td>
<td>Communicating ‘why’, what you know, and what you don’t know</td>
<td>“I’m just the messenger!” or “this came down from leadership...”</td>
</tr>
<tr>
<td>“I don’t agree so I’m not doing it.,” “You don’t understand what it is I do.”</td>
<td>Seeking clarification and constructively discussing disagreements</td>
<td>“Okay Boss” “Pocket-veto (Saying yes, and purposely doing nothing)”</td>
</tr>
</tbody>
</table>
Current Culture
All Respondents
N=23

Constructive
Cultures promote effective goal setting and achievement, growth and learning, and teamwork and collaboration.

Aggressive/Defensive
Cultures lead to internal competition, management by exception, and short-term emphasis as opposed to long-term effectiveness.

Passive/Defensive
Cultures lead to conformity, rigidity, and lack of team member accountability and initiative.
Subgroup Analysis (Current)

- DHS
- Vision Council
- Providers
- Non-Vision Council
Current Culture versus Ideal Culture

Current Culture
N=23

Ideal Culture
N=14

Research and Development by: Robert A. Cooke, Ph.D. and Janet L. Szumal, Ph.D.
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### Style 1: Humanistic-Encouraging

<table>
<thead>
<tr>
<th>All Respondents</th>
<th>Current Mean</th>
<th>Ideal Mean</th>
<th>Gap Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>help others think for themselves</td>
<td>3.70</td>
<td>4.50</td>
<td>-0.80</td>
</tr>
<tr>
<td>involve others in decisions affecting them</td>
<td>3.78</td>
<td>4.57</td>
<td>-0.79</td>
</tr>
<tr>
<td>resolve conflicts constructively</td>
<td>4.22</td>
<td>4.86</td>
<td>-0.64</td>
</tr>
<tr>
<td>help others to grow and develop</td>
<td>4.00</td>
<td>4.57</td>
<td>-0.57</td>
</tr>
<tr>
<td>give positive rewards to others</td>
<td>3.57</td>
<td>4.07</td>
<td>-0.51</td>
</tr>
<tr>
<td>take time with people</td>
<td>3.91</td>
<td>4.36</td>
<td>-0.44</td>
</tr>
<tr>
<td>be a good listener</td>
<td>4.35</td>
<td>4.71</td>
<td>-0.37</td>
</tr>
<tr>
<td>encourage others</td>
<td>4.04</td>
<td>4.36</td>
<td>-0.31</td>
</tr>
<tr>
<td>be supportive of others</td>
<td>4.22</td>
<td>4.43</td>
<td>-0.21</td>
</tr>
<tr>
<td>show concern for the needs of others</td>
<td>4.43</td>
<td>4.57</td>
<td>-0.14</td>
</tr>
</tbody>
</table>

1 = Not at all; 5 = To a very great extent

\[
\text{Gap} = (\text{Current} - \text{Ideal})
\]

A negative (-) gap indicates that the current mean for a particular item needs to be increased.
A positive gap indicates that the current mean for a particular item is better than the ideal.
# Style 12: Self-Actualizing

<table>
<thead>
<tr>
<th>All Respondents</th>
<th>Current Mean</th>
<th>Ideal Mean</th>
<th>Gap Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>think in unique and independent ways</td>
<td>3.26</td>
<td>4.43</td>
<td>-1.17</td>
</tr>
<tr>
<td>communicate ideas</td>
<td>3.96</td>
<td>4.71</td>
<td>-0.76</td>
</tr>
<tr>
<td>enjoy their work</td>
<td>3.39</td>
<td>4.14</td>
<td>-0.75</td>
</tr>
<tr>
<td>emphasize quality over quantity</td>
<td>3.26</td>
<td>4.00</td>
<td>-0.74</td>
</tr>
<tr>
<td>maintain their personal integrity</td>
<td>4.13</td>
<td>4.71</td>
<td>-0.58</td>
</tr>
<tr>
<td>be concerned about their own growth</td>
<td>3.26</td>
<td>3.79</td>
<td>-0.52</td>
</tr>
<tr>
<td>be open about self</td>
<td>3.00</td>
<td>3.50</td>
<td>-0.50</td>
</tr>
<tr>
<td>do even simple tasks well</td>
<td>3.78</td>
<td>4.21</td>
<td>-0.43</td>
</tr>
<tr>
<td>resist conformity</td>
<td>2.04</td>
<td>2.43</td>
<td>-0.39</td>
</tr>
<tr>
<td>be spontaneous</td>
<td>2.70</td>
<td>2.71</td>
<td>-0.02</td>
</tr>
</tbody>
</table>

1 = Not at all; 5 = To a very great extent

\[ \text{Gap} = (\text{Current} - \text{Ideal}) \]

A negative (-) gap indicates that the current mean for a particular item needs to be increased.

A positive gap indicates that the current mean for a particular item is better than the ideal.
## Style 7: Oppositional

<table>
<thead>
<tr>
<th>All Respondents</th>
<th>Current Mean</th>
<th>Ideal Mean</th>
<th>Gap Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>look for mistakes</td>
<td>2.87</td>
<td>2.07</td>
<td>0.80</td>
</tr>
<tr>
<td>point out flaws</td>
<td>3.04</td>
<td>2.36</td>
<td>0.69</td>
</tr>
<tr>
<td>oppose things indirectly</td>
<td>1.96</td>
<td>1.29</td>
<td>0.67</td>
</tr>
<tr>
<td>remain aloof from the situation</td>
<td>1.96</td>
<td>1.29</td>
<td>0.67</td>
</tr>
<tr>
<td>be hard to impress</td>
<td>1.87</td>
<td>1.29</td>
<td>0.58</td>
</tr>
<tr>
<td>oppose new ideas</td>
<td>1.91</td>
<td>1.43</td>
<td>0.48</td>
</tr>
<tr>
<td>refuse to accept criticism</td>
<td>1.61</td>
<td>1.21</td>
<td>0.39</td>
</tr>
<tr>
<td>play the role of the &quot;loyal opposition&quot;</td>
<td>1.96</td>
<td>1.64</td>
<td>0.31</td>
</tr>
<tr>
<td>stay detached and perfectly objective</td>
<td>2.83</td>
<td>2.57</td>
<td>0.25</td>
</tr>
<tr>
<td>question decisions made by others</td>
<td>2.61</td>
<td>2.79</td>
<td>-0.18</td>
</tr>
</tbody>
</table>

1 = Not at all; 5 = To a very great extent  

\[ \text{Gap} = (\text{Current} - \text{Ideal}) \]  

A positive gap indicates that the current mean for a particular item needs to be decreased.  
A negative (-) gap indicates that the current mean for a particular item is better than the ideal.
# Change Leadership Vision Council

## System Culture Shift

**FROM**

<table>
<thead>
<tr>
<th>Defensive Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assessed State: Compliance Mindset</td>
</tr>
</tbody>
</table>

**TO**

<table>
<thead>
<tr>
<th>Constructive Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Goal for the System: Move to a Value-Based Mindset</td>
</tr>
</tbody>
</table>

### Current Assessed Behaviors:

1. Communicating only “What”
2. Fix-it Mindset
3. Fear of risk and change
4. Geographic Alignment
5. Outcomes measured by negative indicators

### Ideal Behaviors:

1. Communicating “What and Why”
2. Progress Mindset
3. Be an agent of change, be proactive and increase advocacy
4. Goal Alignment
5. Outcomes measured by positive indicators

---

This System Culture Shift proposal was drafted by the Change Leadership Vision Council, a public-private initiative convened by The Coalition for Family and Children Services in Iowa, funded by the Mid-Iowa Health Foundation.

**CONTACT:** Kelli Soyer, MSW, LMSW, Associate Director, at kelli@iachild.org
FROM-TO SHIFT:
Practical tools and actions to shift the system culture,
Part 1
TAKE A BREAK
FROM-TO SHIFT:
Practical tools and actions to shift the system culture, Part 2
Processing the From-To Practice

• How much did the scenarios resonate – both the situations and the dynamics when role playing through them?
• What were some of the key takeaways from your practice using the scenarios?
• What did this exercise surface for you about what it will take to actually cause the culture shift to happen?
• What would you like to work on in future meetings? Learn more about?
OPTIONS TO SUPPORT FROM-TO CULTURE SHIFT (12/4 – 1/8)

1. Enlist an individual or group as partners in the Culture Shift work, making a specific request of them (name; request, if you know)
2. Return to an individual or group you’ve already presented the Culture Shift Work to and take another step (name)
3. Practice an element of the ideal culture in an upcoming situation (which one(s))
4. Use the From-To Shift framework and other tools to address a challenging situation that is a barrier to the “To,” or future, culture.
5. Present the From-To shift to a key group (name, e.g. Board, Work Group, staff, etc.)
6. Observe for a specific behavior pattern in an upcoming setting (which behavior / which setting)
7. Other?
What is one thing that needs to happen to call others into action with the Vision Council for the Systems Culture Work?

What is at least one support you need to call others into action for the Systems Culture Shift work?
ACTION

COMMITMENT

REVIEW
2020
INITIAL VISION
COUNCIL MEETING
SCHEDULE
January 8
February 25
April 1
THANK YOU
Theory of Aligned Contributions

Measurable Population Level Improvement on a Condition of Well-Being for Children and Families

Aligned Contributions
Leaders from Across Sectors Take Aligned Action at a Specified Scope and Scale

A Sense of Urgency
Public Accountability

Focus on a Measurable Result

Leaders Collaborate and Take a Skilled Approach
Make Decisions Together
Move From Talk to Action
Do Adaptive Work
Be Accountable for Making Measurable Difference
Assumptions of Theory of Aligned Contributions

Population level changes cannot be made by a single agency or organization; must be multi-sector, public-private*

Outcomes for children, families and communities are not what they could be in part because key stakeholders are not yet fully aligned

Seemingly intractable nature of problems, social conditions, systems and challenges sap energy and sense of urgency

Public accountability can increase urgency and create a personal sense of accountability for taking aligned action and making an aligned contribution

*Shorr, Lisbeth, Common Purpose, 1997
Actions to “tip” the odds that good things will happen can be generated by a small group of people with a common purpose, connected relationships and a sense of urgency*

Leaders given “permission” to engage in action learning ** with a sense of urgency can use the depth of their experience and wisdom to galvanize change and forward movement

Leaders can achieve progress through their commitment to taking aligned actions and leveraging current relationships, resources and opportunities ***

---

Focus of Adaptive Leadership

- Go to the Balcony
- I.D. the Adaptive Challenge
- Adapt values and behaviors to take aligned action
- Give the work back to the group
- Surface the conflict
- Regulate distress
The Person Role System Framework

2

PERSON
ROLE
SYSTEM

2Kathleen Pogue White, Person Role System Framework Briefing Note
# Levels of Action and Alignment

<table>
<thead>
<tr>
<th></th>
<th>Low level of action that does not contribute to improved results</th>
<th>High level of action that contributes to improved results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Does not work to be in alignment with others</td>
<td>Works to be in alignment with others</td>
</tr>
<tr>
<td>High</td>
<td>(Low action, low alignment)</td>
<td>(High action, high alignment)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Low level of action that does not contribute to improved results</th>
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<tr>
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<td>Works to be in alignment with others</td>
</tr>
<tr>
<td>High</td>
<td>(Low action, low alignment)</td>
<td>(High action, high alignment)</td>
</tr>
</tbody>
</table>

Works to be in alignment with others

(LOW) Takes actions that contribute to results

(HIGH) Does not work to be in alignment with others
Boundary, Authority, Role & Task (BART)

- **BOUNDARY** (time, territory and task)
- **AUTHORITY** (the right to do work)
- **ROLE** (function of the person / entity)
- **TASK** (the work of the group)

Resources, roles, and responsibilities

Primary task (group mission)

Process tasks (draw attention to work avoidance)

Formal
Personal

Formal Role
Informal Role