

WINTERBERRY CHARTER SCHOOL COMMUNITY RETREAT: A STRENGTHS-BASED APPROACH TO SCHOOL DEVELOPMENT USING APPRECIATIVE INQUIRY

April 19, 20, 21, 2007

Anchorage, Alaska

PART ONE SUMMARY OF THE PROCESS

Winterberry Charter School is a public charter school using Waldorf curriculum and methods and authorized by the Anchorage School District (ASD). Their relationship with ASD is a positive one and is facilitated by the WCS administrator and an official ASD liaison. The school serves over 150 students with two kindergartens and grades 1 through 6. The plan is to offer a seventh grade next year and to have enrollment increase to 180. Although there is only one Waldorf trained teacher (kindergarten), the staff is enrolled in Rudolf Steiner College's Community Learning Center program and is receiving training under the direction of Astrid Schmidt. The Academic Policy Committee (APC) serves as the governing body for the school and is advisory to ASD. The Faculty and the Winterberry Parent Guild (WPG) make up the other two leadership teams of the school. The school has been in operation for two years and is supported by a dynamic community of parents, teachers and staff.

Hoffecker Burgess Consulting (HBC) was engaged by Winterberry's Academic Policy Committee to assist the leadership team of the school in their review of shared values for the purpose of enhancing alignment. Clarification of communication and decision-making practices at the school and a review of overall organizational strengths and capacities are also important considerations as the school prepares to take the next steps in its development.

Prior to our visit, we reviewed the school's charter documents and other key documents as well as preliminary profiles of the school received from the administration. Several Key Result Areas (KRAs) were identified by the Administrator of the school prior to our arrival and were confirmed subsequently during our interview process with twelve leaders within the school community. These KRAs were:

1. To identify ways to improve the clarity and quality of internal organizational communication and decision-making processes;
2. To build on core strengths of the founders to cultivate a deepened and more widespread understanding of the mission and vision of the school thus increasing a sense of ownership of that mission and vision among faculty and parents.
3. To broaden participation at all levels of the school's operations.
4. To articulate, affirm and focus core strengths of the faculty regarding what they are currently contributing to the program while they are becoming more familiar with the Waldorf curriculum and Waldorf methods which are appropriate for public school.

Once at the site, our process began on Thursday, April 19 with a 30 minute phone interview with the ASD liaison. We then were introduced to the faculty over lunch and conducted a 90 minute session with the faculty in the afternoon.

WORKING WITH THE FACULTY

After introductions, the faculty was given brief presentations on Appreciative Inquiry (AI) and the “Power of Image,” uniting the basis of AI with one of the core elements of Waldorf education, i.e., teaching through the use of images. The faculty was also introduced to Allenbaugh’s model of “Principled Decision Making” including concepts such as:

- putting content into context
- testing for alignment of principles/values through the “three P process” of decision-making (P1- Principles, P2- Process, P3-Priorities)
- dialogue and discussion and their roles in group conversation, information sharing and decision making

The faculty was then asked to respond to the following open-ended questions:

1. Share one thing that you value about yourself as a teacher.
2. What does your understanding of Steiner’s concept of “loving self-evident authority” look like in practice? Give as detailed a picture as you can.
3. How do you know when “deep learning” is taking place within your student(s)? What images arise for you when you picture this taking place within one of your students?
4. Share something that you value about the colleague sitting next to you .

OBSERVATION OF ACADEMIC POLICY COMMITTEE MEETING

Thursday evening’s observation of the APC meeting, attended also by the district liaison and members of the school community, provided opportunities to witness group interaction and process dealing with current school issues.

PRELIMINARY INDIVIDUAL INTERVIEWS

In order to discover our “positive topic of inquiry” given the needs and concerns of the school, a day-long interview process was conducted on Friday with 7 members from the APC, 2 parents at-large, a representative from the Parent Guild and an administrative staff member. Each interviewee was asked the following questions and their confidential answers were used solely by the consultants to inform their creation of the “positive topic of inquiry.”

1. What do you most value about your experience with Winterberry Charter School?
... about your child’s experience ?.. your family’s experience?
2. What are the “core strengths” that you experience in the school community that enabled it to be successfully founded? What are some core strengths that have sustained the school over the past two years?
3. Without being humble, tell us about some strengths and talents that you have and would like to contribute to the school for its continued success.
4. What are three wishes you have for the school for the next year? Things that would enable it to become an even more vibrant center of “inspired learning” (taken from WCS’s 14 points on “Inspired Learning”)?

THEMES THAT EMERGED FROM PRELIMINARY INTERVIEWS

1. Unanimity and clarity of founders' vision.
2. Vision, commitment and perseverance have been critical to the school's success.
3. When and how for the founders to "let go;" both an individual and organizational question
4. The need for clear, respectful, transparent communication throughout the community.
5. The teachers are greatly appreciated; the community wants to continue supporting their training.
6. The school is currently engaged in a "balancing act:" balancing the desire to be small with the need to be financially sound; balancing the desire to grow in enrollment with need for adequate space for all.

WISHES

1. A beautiful space that is large enough and has adequate areas for play.
2. More staff support for teachers and administration
3. More opportunities for the whole community to come together; more times when faculty, administration and APC come together.

COMMUNITY WORKSHOP USING APPRECIATIVE INQUIRY

Inquiring into Exceptionally Positive Moments

On Saturday, 24 members of the Winterberry Charter School community who are deeply engaged in the life and leadership of the school, met from 9:30am until 6:30pm to inquire into the topic of "Building on the Strengths of Our Founding Vision." They began the morning by participating in paired interviews (see below) and engaging in dialogue and discussion around common themes that were generated through the interviews. The group inquired into exceptionally positive moments in their experience with the school and shared stories and identified "life-giving forces" at work within the school.

Clearer communication within the school, more transparency around decision-making processes within the governance of the school and deepened commitment to the mission and vision of WSC were some of the most "high energy" themes that emerged from the interview process. The afternoon saw the creation of "innovation teams" with individualized mission statements and designs for "well-formed outcomes"(images of preferred futures) including time frames, measures of success and elements that are resources at hand as well as those that may still be needed. Each group reported their results in the ending plenary session.

We started the morning with a verse from Rudolf Steiner called "The Social Motto":

"The healing social life can be found
when in the mirror of each human soul
the whole community finds reflection
and when in the community the virtue
of each one is living."

At key junctures throughout the day, HBC shared theoretical foundations on the use of AI as a method for creative systems transformation and described aspects of charter school development:

1. “Core Principles of Appreciative Inquiry,” from Whitney and Trosten-Bloom :
 - Constructionist Principle: “human systems evolve in the direction of the images they create based on the questions they ask as we strive to understand the dynamics at work”
 - Principle of Simultaneity: “change begins the moment we ask the question”
 - Anticipatory Principle: “our behavior in the present is highly influenced by the future we anticipate”
 - Poetic Principle: “just as poets have no constraints on what they can write about, we have no boundaries on what we can inquire into and learn from”
 - Positive Principle: “the more positive the questions used to guide the change process, the more long-lasting and effective that process will be.”
2. The importance of transitions from Idea to Form and Function in the three “classic” stages of charter school development:
 - Pioneer Stage
 - Implementation Stage
 - Settler Stage

MODIFIED INTERVIEW GUIDE FOR WINTERBERRY CHARTER SCHOOL

Positive Topic Of Inquiry: “*Building On The Strengths Of Our Founding Vision*”

1. In each of our lives there are moments when we feel really good about the work we are doing and what we are contributing to others. As you think back over your time at WSC, tell me a story about one of those special moments when your work as a member of the school community was especially meaningful and satisfying.
 - What made it a deeply meaningful experience for you?
 - What was happening at the time in the life of the school community?
 - What were you doing?
 - What were others doing?
 - What was the quality of interaction between you and others you were working with?
2. Without being humble, tell me what you value deeply about yourself as a member of this school community.
3. In initial work with parents and teachers, three qualities were identified which have been critical to the school’s founding and success in its first two years of operation: strong vision, commitment and perseverance. Please tell me a story about a time when you experienced these qualities in action in yourself or others in the service of Winterberry School.
 - How were these qualities supported by others?...by your peers?...by the administration?...by the APC?...by the Parent Guild?
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4. In preparation for today, time and again people expressed their strong desire to be meaningfully included in the life of the school, to feel “connection,” to be working together effectively on common goals. Please describe a time, in your experience with the school, when you felt “part of the team”, when you experienced support in working with others towards a common goal.
 - What contributed to your sense of connectedness and inclusion?

- How was information shared?
 - How were decisions made?
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5. What are your expectations of the school in the future? In your view, what are the expectations of the school community?... the larger Anchorage community?
6. What is the core factor that gives life and vitality to the school- one thing that is important for the community to build upon as the school moves into the future?
7. In interviews with parents and teachers, three core wishes for the school emerged:
- A beautiful space that is large enough inside and out and has, especially, adequate areas for play
 - More staff to support the teachers and the Administrator
 - More opportunities for the whole community to come together, including times for the faculty, the APC and the administration to come together.
- Do you have another wish for the school that you would like to express?

In the afternoon, “innovation teams” formed around various “high energy” themes. The instruction was for the members of the group to only take up a theme that was truly inspiring to them. Some teams only had one member. Some members shifted out of one team and joined another or created a new team. All teams were asked to follow, to the extent they were able, the following guidelines for creating “well-formed outcomes:”

CREATING WELL-FORMED OUTCOMES

1. Please create an image or metaphor (a picture, diagram, poem, word portrait, etc.) that depicts the work of your Innovation Team.
2. Please write a brief “mission statement” for your team.
3. Please create a vision statement describing what your Innovation Team will have accomplished by May 2008 (hint: use the senses in your description –what will you be able to see, hear, touch, feel?)
4. What are the steps your team needs to take in order to actualize the team’s vision?
5. What resources do you have within your team to accomplish your intended outcomes? What resources do you need?
6. What is the next step that your Innovation Team needs to take?
7. When is your next meeting scheduled?

Saturday ended at 6:30 with the whole group sharing reflections on the day’s time together. One of the participants volunteered to record the entire list of “high energy themes” that were generated by the four small groups earlier in the day and which helped to shape the formation of the Innovation Teams. HBC requested that a representative from each Innovation Team send the results of their work on well-formed outcomes to the administrator by email.

PART TWO

HBC OBSERVATIONS, SUMMARY AND RECOMMENDATIONS

The Winterberry Charter School community has a dynamic core group of parents, teachers and staff who have achieved remarkable results in just the two years of their operation. They have over 150 students and have developed a strong, positive relationship with their authorizing district as well as the broader community of Anchorage. They are embarking on the next step in their school's development by seeking to clarify their mission and refine their vision to reflect the needs of the school as it progresses into its third year and continuing on into the future.

REPORTED/OBSERVED ASSETS

- Strong, positive relationship with authorizing district (ASD)
- According to the district liaison, parents, faculty and administrative staff provide valued evidence of ASD's commitment to parents' access to "high quality schools of choice" within its district
- District liaison expresses confidence that the children are learning and will be prepared for all mandated federal and state testing
- Administrator's tenacity, drive and work ethic promotes confidence in the school by ASD
- Unique and compelling philosophy and educational model
- Parents report that their children are enthusiastic about going to school
- Highly motivated and committed faculty and staff that work together well
- Faculty committed to ongoing training in Waldorf education theory and practice (5 weeks of training per year; 3 at Rudolf Steiner College in July; 2 in Anchorage, RSC Community Learning Center)
- Downtown, high profile location
- Founders' vision and their determination to "see it through" and their ability to motivate others to join the endeavor
- Highly dedicated, determined, adaptable core leadership with similar vision
- The school's "Inspired Learning-14 Points" document provides a detailed vision of the aims of the school and sets high standards for performance
- Highly supportive parent body
- Highly motivated and effective Parent Guild
- School leaders take the initiative to engage in a school self-review
- Administration and APC are taking necessary steps to operate within a balanced budget
- Evidence of "servant leadership" in practice

REPORTED/OBSERVED CHALLENGES

Facilities:

- a steady increase in numbers of students causing the need for more internal and external physical space;
- lease renewal negotiations currently underway may limit, to some extent, facilities options for the immediate future

Program:

- implementing a Waldorf curriculum using Waldorf methods when only one faculty member is a fully trained Waldorf teacher presents a challenge; ongoing training remains a top priority
- increasing support services for faculty and administrative staff

Governance:

- finding ways to create more opportunities for all members of the school community to participate meaningfully in as many levels of school life as possible while maintaining a clear commitment to the founding mission and vision of WCS;
- strengthening and clarifying channels of communication, procedures for decision-making, and lines of accountability and authority;
- need to revise and update charter school by-laws to reflect current and desired policies, procedures and practice

Funding:

- finding ways to fund more staff, specialty programs, site development and outreach programs

PART THREE

SUSTAINING AN APPRECIATIVE APPROACH TO WINTERBERRY CHARTER SCHOOL'S DEVELOPMENT AS AN OUTSTANDING WALDORF METHODS CHARTER SCHOOL

“When people focus on human ideals and achievements, peak experiences, and best practices, these things-not the conflicts or deficits-tend to flourish” (Mohr/Watkins)

HBC RECOMMENDATIONS

1. Officially recognize the “Innovation Teams”(ITs) created during the April '07 community retreat, along with their various missions and goals, as “Administrative Committees” under the mandate of the Administrator of the school. Have the ITs make regular, brief written updates to the Administrator on their progress and needs. These reports could become folded into the Administrator’s regular reports to the APC.
2. Establish, by APC resolution, that all standing committees for the school, except those belonging to and maintained by the Parent Guild, become “Administrative Committees” under the supervision of the Administrator. This can clarify lines of communication, expedite information flow and assist the administrator in the accomplishment of her tasks.
3. Continue to invite all people affiliated with the school to join the process of helping WCS take the next steps in its development as a “vibrant center of inspired learning” by holding retreats, creating community “forums”, continuing to invite experts on Waldorf education and charter school development to speak to the school community as well as interested members of the greater Anchorage community, (including special efforts to invite school district leaders).

4. Create an administrative committee made up of a representative from the APC, the faculty, the Parent Guild and a parent at large (4) with oversight from administration, to update and revise the charter school's by-laws to reflect current best policy, procedures and practices. Start the process by June of this year. Take several months to complete the task if necessary. HBC will provide the administration with well crafted models used by other Waldorf methods charter schools.
5. Mission and Vision: During the by-law revision time, the APC could assist and support by establishing a short time at each meeting (20 minutes) to acknowledge and celebrate current WSC best practices and achievements. This could serve as foundational work for a new and more explicit school mission statement and help to keep alive the powerful entrepreneurial spirit that enabled the school to be founded initially.
6. Communication: Keep current with communication of feelings and needs. Commit to direct communication at all levels of the organization. Support and encourage the IT that is working on communication flow. Establish clear avenues for creative conflict resolution within APC meetings so that no one ever leaves a meeting angry at another participant or at the "school community."
7. APC Meeting Format: Follow agreed-upon procedure during APC meetings to become more efficient with your time. It is a good idea, for example, to follow a version of "parliamentary procedure," to ensure that if your processes are ever challenged or if crucial decisions come into question as to their origin or legitimacy, there is a clear and legal record of the proceedings. Because the APC is mandated by the state to comply with "open meeting" laws, a formal structure-one that is recognized by your authorizer and other outside agencies-is good practice. The process you choose does not have to be "stiff" or unduly formal nor compromise the collegial and collaborative ideals of working together at the school. A warm, yet business-like, even a conversational atmosphere (as long as it is on task) can still be maintained. The group can still embrace the consensus model decision making. Many Waldorf- methods schools use the consensus model of decision making in faculty as well as in their board meetings. They then follow up the action with motions, seconds, further discussion and vote-for the official record. This is particularly important for all "board resolutions" when actual ayes and noes must be recorded in the minutes.
8. APC Agenda Format: When forming the APC agenda, include the use of the words: *information* (when the item will not be discussed or up for vote); *dialogue* (when the APC wishes to provide time and space to have an internal conversation in order to explore values, core issues surrounding a topic without the pressure to act); *discussion* (when it is necessary to discuss a matter for the purposes of coming to a decision); *action* (obvious). When items on the agenda are accompanied by these notations it clarifies what is expected around the interactions of the group as well as providing a sense for the timing and "rhythm" of the meeting. Lastly, place "*public comment*" toward the beginning of the meeting right after "approvals". Limit each person to three to five minutes. You can always bring public comment back if it will help or (is wanted by the public) to inform the APC further on a specific item later on.
9. The Winterberry Parent Guild, as currently constituted, has a dual function: to provide leadership in creating the customs and culture of the school and to support the economic health of the school through fundraising activities. HBC recommends that the Guild establish well-defined committees to take leadership in the development and oversight of activities in these two distinct areas of operation.
10. Since the APC is really a "site-based" governance board acting in an advisory capacity to the ASD and dealing with more than "academics" (eventually the realm of the faculty), including

issues pertaining to the rights sphere as well as the overall economic health of the school, a name change may be an appropriate action to consider. A changed name could further clarify roles throughout the leadership bodies of the school, e.g.

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- Governing board (now the APC, but whatever you choose to call yourselves) assumes the leadership role for the *fiscal accountability and for the legal and rights spheres*
 - Faculty assumes leadership (as it becomes more experienced in implementing Waldorf curriculum and methods) for *pedagogy and program development*
 - Parent Guild (as it stands now) provides leadership and support in the *social/ cultural sphere and economic support for the school programs*
11. We strongly recommend that each Innovation Team take the time to complete the handout on “Well-Formed Outcomes” that they received at the workshop.
 12. As a follow-up to the initial AI process, we recommend that one volunteer who participated in the workshop track the progress of this process through time. This could take the form of brief monthly reports to the Administrator on the ongoing work of the Innovation Teams, occasional articles in the school newsletter to keep the community connected with the work of the ITs, a twice yearly overview of all the work following out of the AI workshop and tracking of any new initiatives that have been stimulated by the AI process. This tracking work could provide an excellent foundation for the development of a strategic plan for the school.
 13. We recommend that in January of 2008, the leadership of the school begin work on a strategic plan (for both a three year and a five year timeline).
 14. We recommend that some of the follow-up consultation time (two hours) that is included in our contract be scheduled with the Administrator to share our experience in forming well-oriented staff hiring teams.