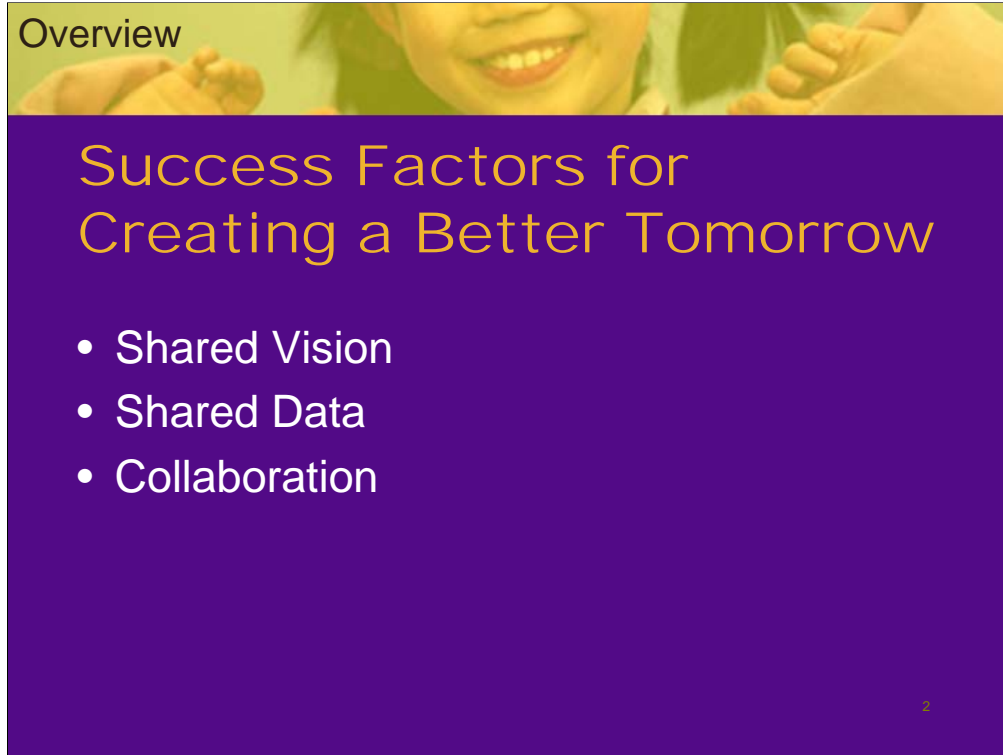




I flew across 17 time zones and the international date line to talk to you today. I have never been so far away from home! Yet I find that no matter how long the distance, I find that people everywhere want the same thing. They want to pursue their passion. They want to do what works. They want to do what's right. I hope the ideas I present here today, rightly or wrongly, stimulate all those things for you!

You should know that I chose this template because of the joy in the children's faces. This is because one of the things I have learned in my Oregon Shines journey is that *studying performance first (not last) enhances engagement, performance and yes, well-being and joy.*

To find that high performance, my friend Dennis Sandow says to "follow the joy."



Overview

Success Factors for Creating a Better Tomorrow

- Shared Vision
- Shared Data
- Collaboration

2

I used to think that studying performance came *last* in the planning cycle, based on what I call the ol' 1-2-3-4: 1) Where are we? 2) Where do we want to go? 3) How do we get there? *And lastly*: 4) How did we do?

In my mind, these three success factors replace that old paradigm. The difference is in the focus on coordinated action around a **shared vision**, based on **shared data** and dialog to constantly generate learning about how **collaboration** happens and how to support it with tools that don't stymie the freedom that people need to connect and perform.

I believe that if we don't get this right, our plans will likely continue to get mixed and mediocre results at all altitudes. By "all altitudes" I mean that these success factors apply universally to societal, state, county, municipal AND organizational efforts.



The first of success factor is shared vision. Shared vision can mean a lot of different things depending on the "altitude."

- A team at Hewlett Packard corporation working on a particular inkjet quality issue may have a very specific assigned purpose.
- A group of providers in a rural community working with troubled youth may be working on a shared outcome that is articulated in their local comprehensive plan for children and families.
- A state agency's vision is even broader and may be inspired by its statutory mission.

Shared Vision

Oregon's shared vision is embodied in Oregon Shines.

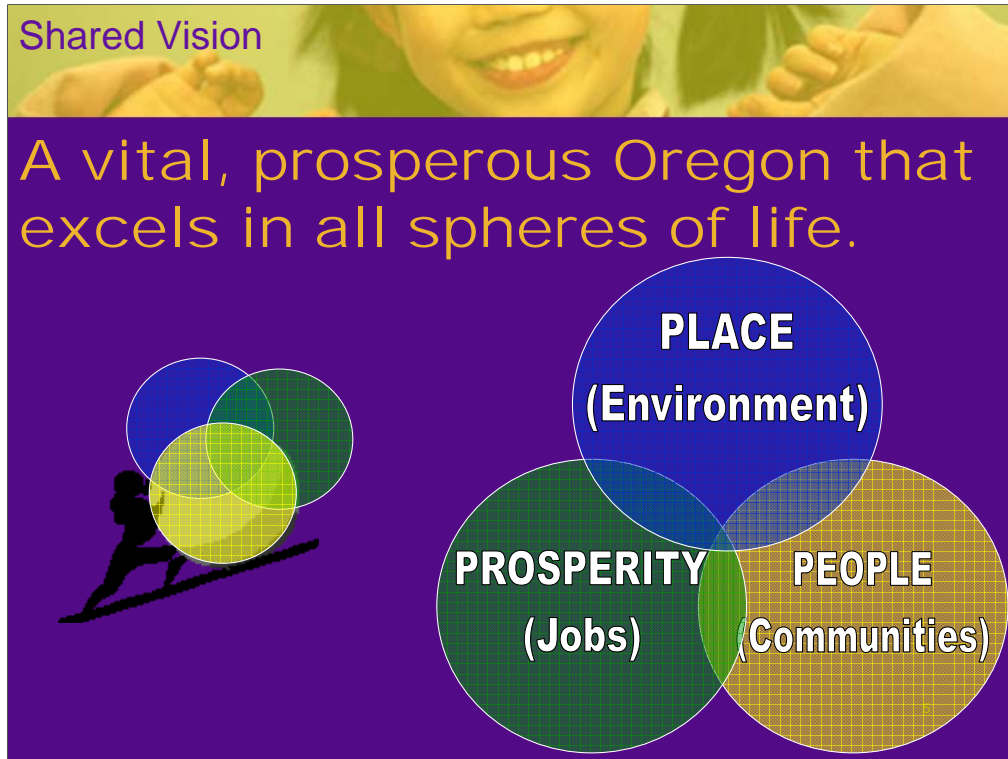


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Oregon Shines is our state's highest-altitude societal vision. Oregon's governor and legislature created Oregon Shines in 1989. And then they created an independent Oregon Progress Board to make sure it didn't just sit on the shelf.

Our traditional approach is a textbook example of inclusivity - lots and lots of people are engaged in the process. Both Oregon Shines I and II relied on extensive input from expert stakeholders and from civic leaders and citizens across the state.

The state plan was updated in 1997. We are now getting ready to do Oregon Shines III to synch the plan to new and stark realities of the 21st century. Oregon Shines III will conserve that tradition of inclusivity and engagement.



Oregon Shines has three goals. They represent the “triple bottom line” for Oregon and are embodied in the Shines II vision, which is:

“A vital, prosperous Oregon that excels in all spheres of life.”

The three goals are:

- Quality jobs for all Oregonians
- Engaged, caring and safe communities
- Healthy, sustainable surroundings

We have always known that these three spheres are interdependent. So the idea is to push all three of them up the hill *at the same time*.



Shared Vision

There are many Oregon Shines partners.

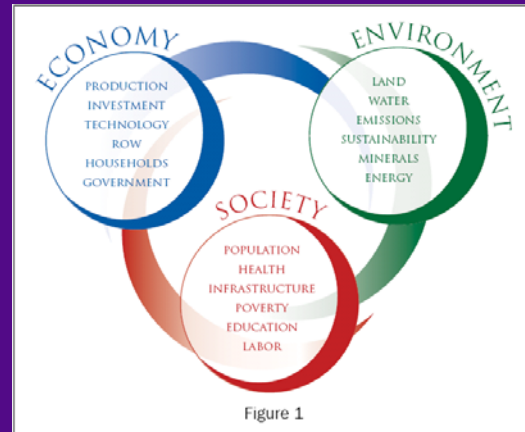
- Economic partners
 - Oregon Business Plan
- Social partners
 - Commission on Children and Families
- Environmental partners
 - Oregon Invasive Species Council
- Community partners
 - SeQuential Biofuels

- Oregon Shines performs a valuable “headlights” function for the state. But it is not where the action is.
- The action is where the partners are. Thousands across Oregon make it happen. They are in the government, non-profit and business sectors. They are at federal, state and local levels.
- Nearly 20 years ago, the original Oregon Shines called for institutional partnerships – for partners to work across boundaries to achieve better results for Oregon. Much progress was made in the past two decades, but in a sad and eerie way, we are still hearing those same partners talk about the need for even more systems thinking and collaboration.
- Part of the problem may be not fully understanding the inter-connected complexity of our world. One of the first things I learned in systems thinking 101 is that our actions can cause unintended consequences that are far removed in time, space and magnitude from the original action. An example is the decision to use food crops like corn to create biofuel. Look what that did! Food prices have sky rocketed.

Shared Vision

"Systems Dynamic Modeling"

- It helps us see the system.
- It uses the same three spheres.
- It elicits knowledge of the system from the people in the system.
- It simulates the future and allows "what if" scenario planning.



A class of tools that can help partners understand complexity is **systems dynamic modeling**. A specific form of this tool caught our eye for Oregon Shines III.

Originally developed at MIT and offered by the non-profit Millennium Institute, the tool is perfect for collaborative mid to long range planning.

- It is based on the principles of systems thinking.
- It uses the same three spheres as Oregon Shines.
- It elicits knowledge of the system from the people in the system.
- It simulates the future and allows "what if" scenario planning
- It helps to identify highest-leverage areas of action.
- It can be used at all levels to better understand the long-term and unanticipated consequences of actions and policies.

The Millennium Institute has used this tool for nearly 20 years in many developing countries and the U.S. and Canada.

This model found, for example, that if Pakistan educated its girls, its men would live 20 years longer.



The second success factor is shared data.

The Oregon Progress Board strives to keep Oregon Shines alive in the minds of Oregonians by reporting actual data on how we are doing as a state. That's where the Oregon Benchmarks come in.

Shared Data

The benchmarks are organized by goal.

Jobs	Economy Education
Communities	Civic Engagement Social Support Public Safety
Environment	Built Natural

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The seven benchmark categories are organized under the three goals of Oregon Shines II.

So under the jobs goal fall the economy and education benchmarks. Benchmark #11, for example, is Oregon’s average per capita income as a percentage of the U.S.

Under the engaged, caring and safe communities goal are the civic engagement, social support and public safety benchmarks. Benchmark #39, for example, is the teen pregnancy rate.

Under the environment goal are benchmarks for both the built and natural environments. Benchmark #75, air quality, is an example here.

Shared Data

We release benchmark reports every two years.

We release benchmark performance reports every two years. It is like we send Oregon to the doctor's office and benchmarks are the lab results. We hold them up to Oregonians and ask, "Is this what you want to be?"

These are the benchmark performance reports that I was lead author on in years past. They were packed with over 100 pages of black and white bar charts and analyses, national comparators and grades.

Each one was in printed form only, which froze the data for two years.

Shared Data

The Progress Board finally joined the 21st century.



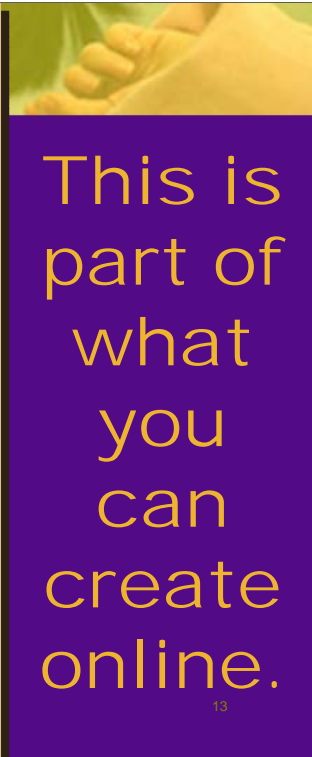
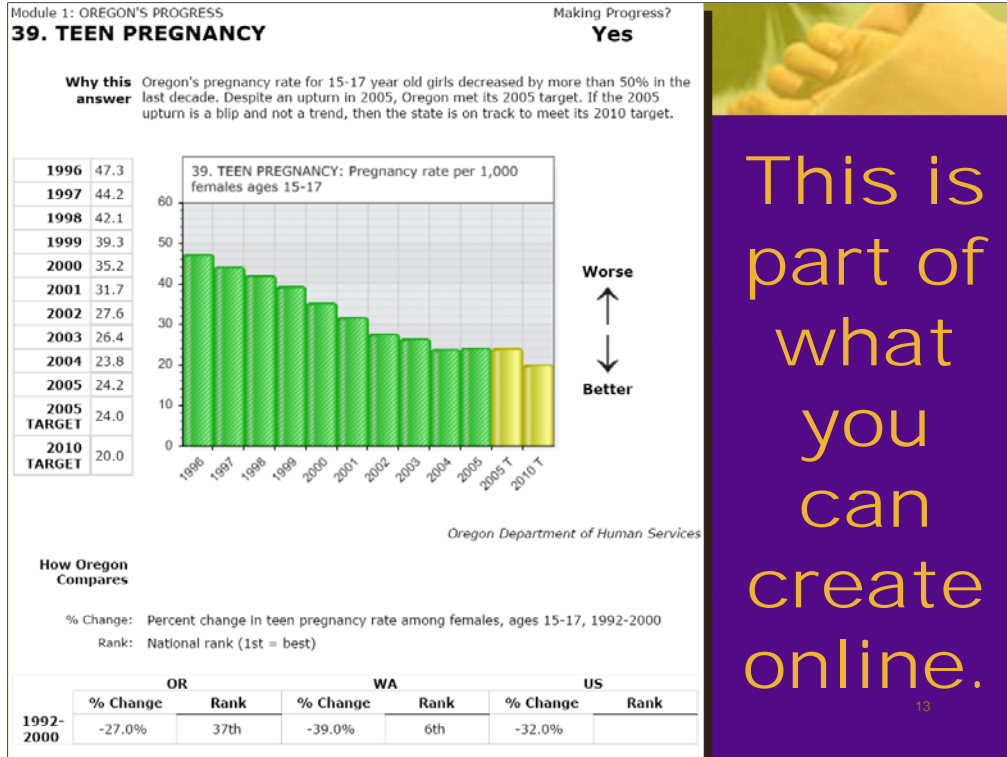
2007

benchmarks.oregon.gov 12

In 2007, with a tiny bit of money, a very talented E-gov intern created Oregon's first-ever 24/7 **online benchmark report generator**.

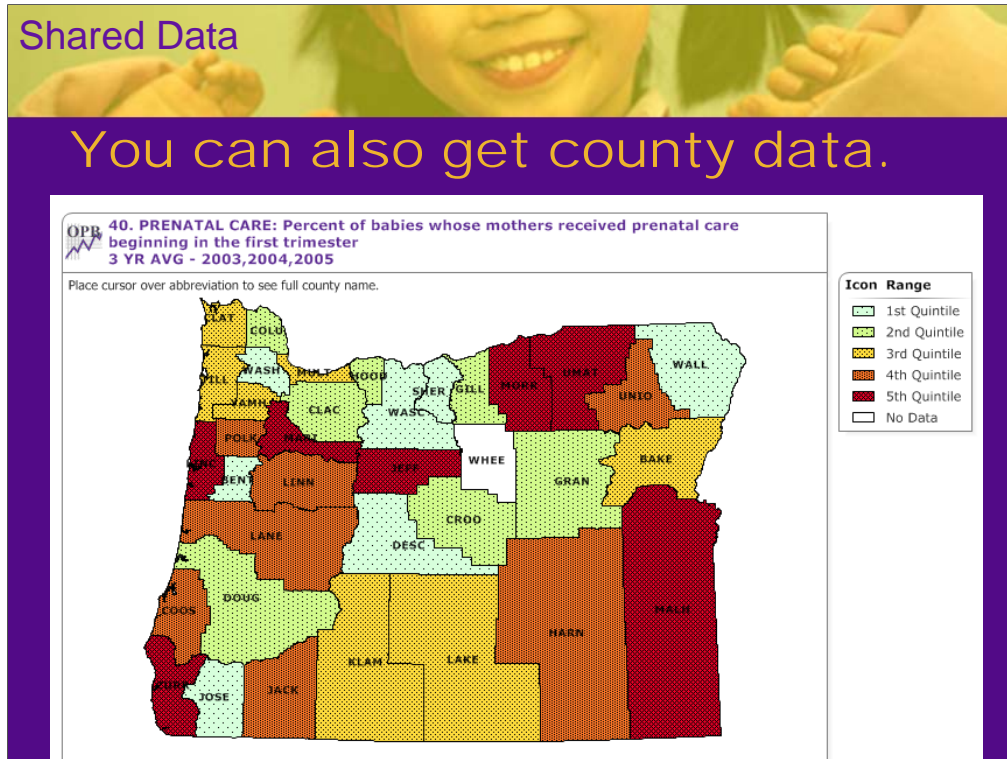
This allowed us to make the 2007 printed report a colorful and short "snapshot" of how Oregon is doing. It pointed to all the detailed data and charts online at **benchmarks.oregon.gov**.

The online benchmark report generator also allows drill-down to state agency performance metrics and is continually updated as new benchmark data points become available



This is just part of what you can generate online – benchmark data and targets, the bar chart, national comparators and the “grade” we give the state on whether it’s making progress against its own target.

In the case of Teen Pregnancy, the grade was “Yes,” the state was making progress. We collectively met our 2005 target (the yellow bars.)



Local communities need local data. So where we can, we break about 30 of the 91 state benchmarks down to the county level. Anyone can click to get maps like this and other county tools.

This map shows data for Oregon’s 36 counties on prenatal care. Light blue is best and red is worst.

Although I am sure they are not used enough, we have received enthusiastic testimonials on how county benchmark data helps local communities focus on shared vision and goals.

Local and regional planning efforts often begin their environmental scans with benchmark data. Advocacy groups like the League of Women Voters also use Oregon Benchmarks in funding requests.

Shared Data

Good government advances the benchmarks.

Agencies self-link their performance to pertinent Oregon Benchmarks.

EXAMPLE
Department of Energy self-links its fossil fuel measure to Benchmark #77, CO2 emissions.

Oregon Shines and the benchmarks are about all of Oregon, not just state government. Yet it is important to remember that state government is a huge player. All the foundations in Oregon give less than three percent of state government expenditures. *Good* government is therefore essential to Oregon’s benchmark progress.

At benchmarks.oregon.gov, you can also drill down to government performance data linked to Oregon Benchmarks. State agencies self-link their Key Performance Measures to pertinent Oregon Benchmarks during the budget process.

The example here is from the Department of Energy, which self-links its fossil fuel KPM to Benchmark #77, CO2 emissions.

Oregon Department of Energy

Mission: The mission of the ODOE is to ensure Oregon has an adequate supply of reliable and affordable energy and is safe from nuclear contamination, by helping Oregonians save energy, develop clean energy resources, promote renewable energy and clean up nuclear waste.

III. KEY MEASURE ANALYSIS

KPM #1	ENERGY SAVINGS Annual fossil fuel savings in trillion Btu from Department of Energy conservation and renewable resource programs. Part 1) Total combined savings for all programs, and savings from individual programs: Part 2) Business Energy Tax Credits (BETC), Part 3) Residential Energy Tax Credits (RETC), Part 4) Small-Scale Energy Loans (SELP), and Part 5) Energy Efficient Design (SEED).	Measure since: 1990
Goal	CONSERVATION -Conservation and renewable resources meet a significant portion of Oregon's incremental energy needs.	
Oregon Context	Oregon Benchmark 77 (formerly 76): Carbon dioxide (CO2) emissions as a percent of 1990 emissions.	
Data source	Program databases and tracking files.	
Owner	Contact: Mike Auman, Assistant Director, Phone: 503-378-2843 Alternate: Loren Judge, Fiscal Manager, Phone: 503-373-7398	

1. **OUR STRATEGY**
Energy savings from ODOE's conservation and renewable resource programs reduce Oregon's use of fossil fuels and thereby reduce CO2 emissions. ODOE works with businesses, industries, state and local governments, schools, institutions, homeowners and renters to save energy and protect the environment.
2. **ABOUT THE TARGETS**
The targets assume the amount of energy savings resulting from ODOE's conservation and renewable resource programs will increase each year as additional new energy projects are completed. Higher numbers are better because if more energy is saved, less fossil fuel is used to meet energy demand and less carbon dioxide is released into the atmosphere.
3. **HOW WE ARE DOING**
In 2001 and 2002, actual performance for all ODOE programs combined was below the target, while in 2003, 2004, 2005 and 2006, actual performance was above the target. In 2006, the BETC and RETC programs performed above their targets, while SELP was on target and the SEED program did not meet its target. The variance in these years is not significant. Variances are the result of unpredictable fluctuations in the number and size of energy-saving and electricity-generating projects that come into ODOE's programs each year. The data show that the agency is on track to continue meeting the target in future years.

	00	01	02	03	04	05	06	07	08	09
Actual	32.30	36.10	38.40	45.20	49.10	63.08	61.10			
Target	32.30	38.30	39.30	41.70	44.20	62.38	55.88	58.92	62.02	64.95

You can even drill all the way down to the pages out of the Department of Energy's Annual Performance Progress Report to see how the agency is doing on that key performance measure.

Shared Data

Local communities, too!

Multiple benchmarks
in multiple goal areas

So we have the benchmarks and we have state agencies linking to the benchmarks. But much of the real action is in the trenches in local communities.

So we want to expand benchmark linkages to the work of local partners who are already engaged in advancing the benchmarks.

We know from a process called **social action research** that collaborative efforts in local communities impact multiple Oregon Benchmarks in multiple goal areas *simultaneously*. This was confirmed in case studies done for the Oregon Shines III Business Plan. For example,

- A community college expanded its service area to two counties and its reach from 2,000 to 12,000 students.
- A non-profit organization turned a struggling rural community's resource-based economy from that of timber to that of value-added wood products and land restoration.
- An innovative biofuel company that does not adversely affect food supply opened the first ever biofuel station in the northwest.

Shared Data

So is Oregon making progress?

Benchmark Short Title	Making Progress?
EDUCATION OVERALL	NO, BUT
<i>Kindergarten—12th Grade</i>	<i>Yes, but</i>
18. Ready To Learn	Yes, but
19. Third Grade Skill Levels	Yes, but
a. Reading	Yes, but
b. Math	Yes
20. Eighth Grade Skill Levels	Yes, but
a. Reading	Yes, but
b. Math	No targets
21. Certificate of Initial Mastery	Yes
22. High School Dropout Rate	Yes
<i>Postsecondary (age 25+)</i>	<i>No, but</i>
23. High School Completion	No
24. Some College Completion	No, but
25. Postsecondary Credentials	Targets TBD
26. College Completion	No, but
a. Bachelor's Degree	Yes
b. Advanced Degrees	Yes
<i>Skill Development</i>	<i>No, but</i>
27. Adult Literacy	Targets TBD
28. a. Computer Usage	No
b. Internet Usage	Yes
29. Labor Force Skills Training	No

BIGGEST IMPROVEMENT IN EDUCATION:

19b. Percent of 3rd-graders achieving skill levels in math

Year	Percentage
'97	63%
'98	63%
'99	63%
'00	63%
'01	63%
'02	63%
'03	63%
'04	63%
'05	63%
'06	86%
'07	81%
'08	81%
'09	81%
'10	90%

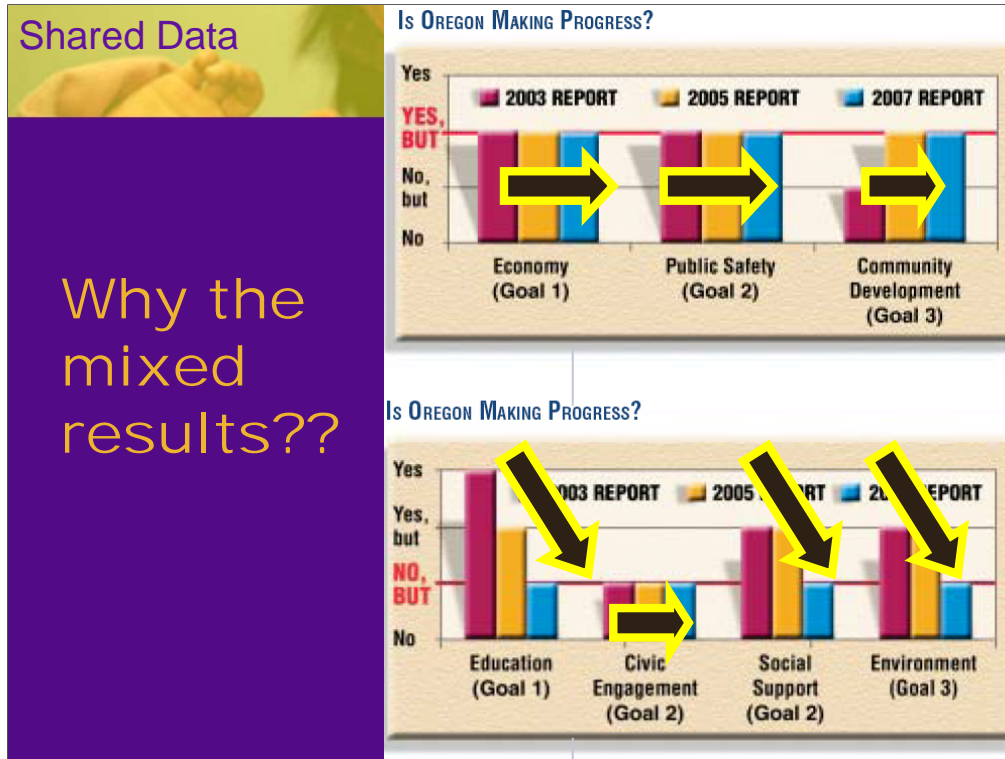
So is Oregon making progress according to all this shared data? Every year we “grade” Oregon by answering **yes, yes but, no** or **no, but** to this question.

These graphics from the 2007 Benchmark Report illustrate that while progress in many specific benchmark areas has been made, progress across families of benchmarks often remains illusive.

We easily met our target for 3rd grade math, for example, but the adult education indicators pulled the overall education grade down to negative territory.

Oregon Progress Board

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The high-level summary from that same report shows a drop in progress from previous reports for three of seven benchmark categories: education, social support and environment. None of the benchmark categories improved overall from the previous report.

So despite all this work – two decades of plans, partnerships, plan updates, the linking of government work to the benchmarks, benchmark publications and a well-used online benchmark report generator - Oregon’s actual results for overall well-being are still mixed.

This is good in that at least we *know* where we stand. But the results are not good enough. Why the mixed results?



Collaboration

Seven expert partner panels came up with one consistent theme:

Oregon needs to invest in collaboration and systems thinking.

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To set the stage for Oregon Shines III, the Progress Board completed an 18-month series of quarterly “partner panels” in all the benchmark categories. Over 40 policy experts in and out of government were asked to tell the board what they thought the critical issues should be for Oregon Shines III.

A common theme emerged from all panels: ***Oregon needs to invest in collaboration, systems thinking and prevention.*** They said, for example, that:

- Oregon’s education, public safety and social support systems cannot be fixed independent of one another.
- A culture change is necessary across all sectors, as no single one has the solution.
- In order to reduce recidivism, released inmates need mental health and drug treatment, housing, and income.



And here's my favorite. During the environmental partner panel, a beloved and dedicated public servant stated the obvious: **It's not just a fish problem or water problem. It's interconnected!**

You should know that in Oregon we have a **separate** agency for fish and wildlife, another for water resources and yet another for environmental quality.

This is in addition to the Watershed Enhancement Board, the Department of Forestry and the Department of Land Conservation and Development – all of which impact fish.



The third success factor is collaboration – how work really gets done.

The next few slides are inspired by my work with Anne Murray Allen and Dennis Sandow and by their article in a 2005 issue of the *Journal of the Society of Organizational Learning*.

DENNIS'S TABLE EXERCISE (15 minutes)

1. Think of a significant achievement you have accomplished at work or in your family or community. Something that you are proud of.
2. Then take out a piece of paper and write down all the names of all people that helped you.
3. Pass the paper to the person on your right.
4. To the person on the right: cross off two names at random and then pass it back.
5. Look at the people eliminated and imagine how the project would have gone without them.
6. How do you feel?
7. Take a few minutes to listen to each other about how this feels.
8. Ask for a few report-backs.

Principle: Relationships are the structure that drive behavior.

Collaboration

Thought leaders in systems thinking and collaboration



Peter Senge

Anne Murray Allen

Dennis Sandow

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I cannot go one bit further without acknowledging the paradigm-busting influence that these individuals have had on me and the design of Oregon Shines III.

Peter Senge, as many of you know, is a founding member of the Center for Organizational Learning at MIT's Sloan School of Management. He is the author of many powerful books including *The Fifth Discipline*.

Anne Murray Allen served in executive roles at Hewlett Packard for 15 years. Anne brought **Dennis Sandow** into HP to help boost performance. Since 1987, **Dennis** has been perfecting his brand of Social Action Research. Dennis works with Dr. Humberto Maturana, a Harvard-educated biologist from Chile who has shown that the natural order of humans is to connect in living social systems where everyone is accepted as legitimate, an aspect of love.

Here's a quote from Dr. Senge: "I will never forget that group of HP engineers and managers talking in the most matter of fact way about love – not as a romantic sentiment but as the most practical truth about what they knew to work in their work – by the end of that two days with Humberto Maturana. Making it easier to manage by love than by fear will undoubtedly be a long-term, ongoing journey for us all – I suspect a defining journey of our time." - *Reflections, Volume 6, Number 23*

Collaboration

What is collaboration?

The *social* coordination of action around a shared purpose (or vision or goal).



So what is collaboration? Dennis and Anne define it as the *social* coordination of action around a shared purpose (or vision or goal).

Emphasis on “social”

Collaboration

Value is created in living, self-organizing social systems.

- Industrial age dominated by *physical* sciences
- Knowledge age dominated by *biological* sciences



Humberto Maturana

Our institutions are still steeped in the 20th century, Industrial Age tradition of static, silo-defining organizational charts, which divide horizontally by specialty and vertically by authority. A similar mindset is ingrained in many fields – medicine, sciences, economics and education – where information and analysis is chunked up so we can get our heads around it. We have become so specialized that it is hard to remember and to function as if we are part of that greater, interconnected whole.

The Knowledge Age is ushering in an anecdote by focusing on the biology of natural, living systems. Humberto Maturana has shown that **intelligent action is created in social systems where all the members of a network accept everyone else as legitimate** (Maturana and Bunnell, 1998). This legitimacy, or the mutual acceptance of one by another, is our natural social order. Org charts are not!

Through years of research in corporate and community settings, Anne and Dennis conclude that **value is almost always created in dynamic, self-organizing social systems** where knowledge is constantly created by doing or coordinated action.



Collaboration

Social systems are self-organizing and constantly changing.

- People **self-organize** by circulating in social systems to maximize their performance.
- Social systems function without overhead, outside coordination, or change efforts to tell them what to do.
- Social systems optimize performance because everyone values everyone else's contributions.

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Social networks are self-organizing and constantly changing.

- People **self-organize** by circulating in social systems to maximize their performance.
- Social systems function without overhead, outside coordination, or change efforts to tell them what to do.
- Social systems optimize performance because everyone values everyone else's contributions.

We can nurture the social systems by following a few basic principles.

Collaboration

Listening to learn

- Performance improvement is proportional to the flow of knowledge that flows through social systems.
- Listening is the key to accessing that knowledge.



Performance is proportional to the flow of knowledge that flows through social systems. “Listening to learn” is the key to accessing the flow of that knowledge.

As we become more curious and interested in learning more, we learn to listen *better*. This increases mutual trust and respect, resulting in an added and not insignificant benefit – the expansion of social well-being.

Why is this? Because we all like to be heard, recognized and accepted by others for our contribution.

Collaboration

Understanding, Trusting and Learning

- People need to understand that you understand them.
- Learning from others is a privilege. Trust conserves that privilege.
- When a group loses trust, it also loses the privilege to learn.



The consequence of listening to learn (and learning to listen) is that at some point in time, the group understands that you understand them. When the group feels understood, it lets you in. Conversations become deeper and generate more knowledge.

Generating knowledge, though, is not a given. A group cannot force an individual to share knowledge. Learning from others is a privilege and trust conserves that privilege.

When a group loses trust, it also loses the privilege to learn and the capacity to generate new knowledge. Think about it. How open would you be to sharing what you know with a group that you don't trust?



Collaboration

Social Action Research

- **Conserves** and **expands** performance and well-being in human communities.
- By creating:
 - **Knowledge** about how work happens, which generates an
 - **Understanding** of how performance occurs in social systems, leading to
 - **Action** by leaders to improve performance

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You and I can listen to learn in our own work and community settings. We can individually build trust and get better and better at collaborating with those around us who are aligned to a common goal or vision.

But Social Action Research takes it a step further. It applies qualitative research methods to simultaneously understand and enhance performance and well-being in human communities, corporate and otherwise. It is built into the design of Oregon Shines III as a way to honor, *conserve and expand* those benchmark-related accomplishments already on the ground in local communities across Oregon.

Dennis says that social action research creates three things:

- **Knowledge** about how work happens, which generates an
- **Understanding** of how performance occurs in social systems, leading to
- **Action** by leaders to improve performance

Collaboration

Social Action Research – Steps

1. Open-ended interviews
2. Social network mapping
3. Learning dialogs



Dennis Sandow

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I'd like to share with you the basic steps social action research. When Dennis does this in the field, it is amazing to see the level of enthusiasm and energy that it generates:

Step 1 is open-ended interviews. The questions have an unabashedly dual purpose: 1) to learn how work happens and 2) to reward interviewees with recognition and respect. This is critical, because this recognition is what *conserves and expands* productivity and well-being. The interview requires deep listening and disciplined note-taking. The process continues until no new individuals are mentioned. All notes are sent back to the interviewees for validation. Once validated, they are read and re-read for patterns and common themes.

Step 2, social network mapping, is about seeing the *relationships* between named individuals in the interview. This is because social networks, not individuals are the engine of productivity. This step involves drawing the real “org” chart of how work happens. Most often, the map bears no resemblance to the official org chart. It spans divisions and seeps outside to partners in totally different organizations and industry sectors.

Step 3, learning dialogs, allows leaders to become more aware of social networks that are the engine of productivity and of approaches that can support them. Most management practices today are developed for silos. And guess what? Results don't happen in silos!

Collaboration
Expanding educational services

- Rogue Community College expanded educational services to Jackson County students



Case study #1

ECONOMY BENCHMARKS
 #1 Employment In Rural Oregon
 #3 New Employers
 #9 Cost Of Doing Business
 #12 Pay Per Worker
 #14 Workers Above Poverty
 #15 Unemployment

EDUCATION BENCHMARKS
 #20 8th Grade Reading And Math
 #22 High School Dropout Rate
 #23 High School Completion
 #24 Some College Completion
 #25 Postsecondary Credentials
 #26 College Completion
 #27 Adult Literacy
 #28 Computer/Internet Usage
 #29 Labor Force Skills Training

SOCIAL SUPPORT BENCHMARKS
 #49 Positive Youth Development
 #54 Poverty


Oregon Shines III is based in part on the assumption that local communities can engage by offering valuable experience to others in advancing the benchmarks. We decided to test that assumption with a few case studies using Dennis method of social action research.

Here's case study #1 - Rogue Community College, after 12 years of community collaboration and legislative work, was able to expand educational services to two counties, not just one. The number of students exploded from 2,000 to 12,000.

This project impacts six economy benchmarks, nine education benchmarks and two benchmarks in social support. I would also wager it impacts public safety (crime) benchmarks, even though that is not listed here by the researcher.

Collaboration
Transforming a timber-based economy

- Wallowa Resources is transforming that area's natural resource extraction economy



Case study #2

OREGON BENCHMARKS

- #1 Employment In Rural Oregon
- #3 New Employers
- #6 Economic Diversification
- #7 Research And Development
- #8 Venture Capital Investments
- #9 Cost Of Doing Business
- #11 Per Capita Income
- #12 Pay Per Worker
- #14 Workers Above Poverty
- #15 Unemployment
- #29 Labor Force Skills Training
- #32 Feeling Of Community
- #49 Positive Youth Development
- #54 Poverty
- #72 Road Condition
- #78 Wetlands
- #79 Stream Water Quality
- #82 Forest Land
- #83 Timber Harvest
- #86 Freshwater Species
- #88 Terrestrial Species
- #89 Natural Habitats
- #90 Invasive Species

Here's case study #2. Wallowa Resources is in the far northeast corner of Oregon in a heavily forested and beautiful mountain area. In the 1980s and prior, like much of rural Oregon, this area's economy was largely driven by the timber industry.

Wallowa Resources now works to transform that economy to one based on restoration, entrepreneurship, and land management.

It impacts a total of 23 Oregon Benchmarks in economy, education, social support, community development and the natural environment.

Collaboration
Turning cooking oil into fuel

- SeQuential Biofuels turns cooking oil to locally consumed energy.



ECONOMY BENCHMARKS
 #1 Employment In Rural Oregon
 #6 Economic Diversification
 #8 Venture Capital Investments

CIVIC ENGAGEMENT BENCHMARKS
 #30 Volunteering
 #32 Feeling Of Community

ENVIRONMENTAL BENCHMARKS
 #76 Air Quality – New Science
 #77 Carbon Dioxide Emissions
 #81 Agricultural Lands

Case study #3 33

Finally, Sequential Biofuels demonstrates an Oregon innovation in creating and consuming locally generated biofuels without adversely affecting food supply. It turns cooking oil into energy.

The SeQuential project impacts eight Oregon Benchmarks in economy, civic engagement and the natural environment.

Collaboration
Common among all case studies

- They improve life in their communities.
- They use metrics to improve performance.
- They impact multiple Oregon Benchmarks.
- They ***involve collaboration*** across all sectors.



As different as these case studies are in subject and location, they reveal some commonalities:

- They improve life in their local communities.
- They use metrics to improve performance.
- They impact multiple Oregon Benchmarks in a whole system way.
- They involve collaboration across private, governmental, educational and not-for-profit organizations.

To me, this represents a new way to engage communities. Don't just ask them what's wrong. Find out what's right. Look for the successes to conserve and expand. Dennis would say, "follow the joy."

Collaboration

Consequences of not understanding performance

- Huge costs of unwittingly messing with productive social systems operating under the radar of traditional management
 - Loss of individual and social well-being
 - Work place stress with all its consequences.



Stop and think about it. If performance really does occur in informal, constantly changing social systems or networks, and not in those in traditional silos, what are the consequences of not understanding this?

Think of an organization, community, business or otherwise, that has undergone a “re-org”. What happened to those social systems?

There are huge costs of unwittingly messing with highly productive social systems that operate under the radar of traditional planning and management methods. This can include loss of individual and social well-being. This in turn results in work place stress with all of its unpleasant and harmful consequences.



This is the last topic that I am going to share with you today, but to me it is extremely important. It embodies the principles of collaboration already mentioned – listening, understanding, trusting and learning. And it ties together the three success factors of having a **shared vision**, **shared data** and **collaboration**.

In my mind, the Accomplishment Model can be applied in many different settings, as long as there is a common vision or purpose shared by a group of people.

Collaboration
The Accomplishment Model

An integrated **planning, performance improvement and collaboration** tool for optimizing performance and well-being


 A photograph of two soccer players in action on a green field. One player is wearing a white jersey with red accents and red shorts, while the other is wearing an orange jersey and white shorts. They are both focused on a soccer ball between them. The background shows a blurred crowd of spectators in a stadium.

The Accomplishment Model is another Dennis invention. It is an integrated planning, performance improvement and collaboration tool for optimizing results and well-being. It is designed to support the *horizontal social networks* as apposed to the *vertical silo*. It is a knowledge and information management strategy that is based on the *social* nature of high performance and knowledge creation.

For all these reasons, I see the Accomplishment Model as a perfect tool to aid in community collaborations and engagement opportunities. It is like a logic model on its side, developed specifically for diverse and dynamic groups of people who are working outside of their normal silo boundaries to achieve a common purpose.

By the way, a great example of performance improvement in social systems is a typical sporting event. On the field, teams self-organize to win. They are collaborative with horizontal connections and they base their actions on data.

Collaboration

The Accomplishment Model

Step 1: Create shared purpose

Employ people with disabilities

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Here's how it works. The **first step is creating a shared purpose**. This step uses qualitative research methods, similar to what I just described. They include:

1. Open-ended interviews with key people using questions such as 'What has been accomplished in last six months?' and "What needs to be accomplished going forward?" The interviewer honors the accomplishments (a critical part) and allows the interviewee to share knowledge freely without interruption or direction. The interviewer takes careful notes.
2. The interviewer send notes to the interviewee for validation.
3. The interviewer reads notes for patterns and themes.
4. Finally, interviewers send identified patterns and themes to interviewees for final validation.

In the 1970's, Dennis created a non-profit business that employed people with severe developmental disabilities in the field of electronic assembly. The board of Dynatron created this purpose for the business effort: "**Employ people with disabilities.**"



Step 2 is about **constructing an Accomplishment Tree**. This is usually done in a collaborative half-day meeting. During that meeting a couple of things need to happen.

1. *The conversation must shift from behavior (e.g. take the bus) to accomplishment (e.g. arrive at work).* This **fre**s people to behave (self-organize) as they need to in order to accomplish something of value.
2. *Construct the accomplishment tree.*
 - **Strategies:** What must we accomplish to achieve our purpose?" Reality check: "If we achieve these strategies, will we accomplish our purpose?"
 - **Tactics:** "What must we accomplish to achieve our strategies?" Same reality check
 - **Tasks,** the next level of specificity, *cannot be planned.* Tasks evolve through daily coordination of action within social systems.

Continuing the Dynatron example, the four strategies to employ people with disabilities were identified as: get work, keep work, train workforce and support social integration.



The final step is about managing performance. It **creates a performance measure** for the purpose and for each strategy and tactic. It then uses the data in group dialogs to strategically focus energy and coordinate tasks. There are a couple of important principles:

Data must be:

- *Actionable* – leads to coordination of action
- *Relevant* – to the purpose, strategy or tactic
- *Timely* – shorter cycles are best for daily team learning
- *Accessible* - posted for all to see

Ideally, short daily meetings follow the levels of the accomplishment tree to celebrate accomplishments and strategically identify tasks for improving performance the following day. Facilitation should be rotated and shared by everyone as everyone is accepted as legitimate by everyone else.



Where two or more are working together...

- They need those critical success factors: a shared vision, shared data and collaboration.
- Social action research can expand productivity and social well-being by learning and legitimizing all involved.
- The Accomplishment Model can help get things done. It is not rocket science!

I'd like to offer these take-aways from today's talk:

- Wherever you have two or more people working together, their progress will be enhanced by having a shared vision, shared data and the ability and willingness to collaborate.
- Social action research can expand collaboration, productivity and social well-being by understanding how work happens and legitimizing all involved.
- The Accomplishment Model is a collaborative, data-based tool to help teams get things done and feel great about it, too.

Stay tuned for Oregon Shines III. Although it may not get fully funded, the principles of systems thinking and collaboration will not go away. Our future depends on them!



This slide show, including the notes pages, are posted on the Progress Board's web site on the "Slide Shows" page.



Thank you!

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