LEADERSHIP AT A TURNING POINT

EAGLE INSTITUTE
JULY 19–22, 2016 • WILLIAMSBURG, VIRGINIA

“This was a really well-planned and well-executed professional development experience. It was a lot in a short time, but I am coming out of the experience equipped with new tools to use in my practice. Well done!”

PATRICK MCDERMOTT, RSBA, SFO
Assistant Superintendent for Business and Finance
Freeport SD No. 145, Freeport, IL

ASBOINTL.ORG/EAGLEINSTITUTE

Eagle Institute and Eagle Awards
Proudly sponsored by
Dear Colleagues,

Welcome to ASBO International’s 2016 Eagle Institute! We are excited to bring you to the Historic Triangle to learn leadership strategies from some of the most influential events in American history.

More and more often, districts and organizations are forced to make difficult decisions involving hundreds, if not thousands of lives. Guiding your team and your district is difficult, but possible with the right knowledge and attitude. Influenced by the theme *Leadership at a Turning Point*, this year’s Eagle Institute offers a plethora of ways for you to better prepare yourself to lead through a difficult situation.

Williamsburg, Virginia, and the Historic Triangle provide the perfect stage for learning how to lead through a turning point. The Battle of Yorktown just a few miles away from Williamsburg proved itself to be the pivotal battle that allowed General Washington to gain the United States’ independence from Britain. General Washington understood the importance of leadership at that critical juncture and led his troops to victory. We will look at the ways he strategically led the Continental Army to force the British to surrender.

We will also be touring historic Colonial Williamsburg and learning about the turning point at which the colonists decided to move from Jamestown to Williamsburg. This relocation was critical to the survival of not only the colony, but the colonists as well.

In addition to enhancing your ability to lead, you will learn from and collaborate with nationally recognized speakers, esteemed leaders, new and veteran school business professionals, and the 2015 recipients of the prestigious Eagle Awards.

Please join us in thanking AXA, sponsor of the Eagle Institute and the Eagle Awards, for supporting this leadership development opportunity for school business professionals.

Your commitment to leadership and fiscal integrity in school business management makes your role in education a critical one. We hope you take this opportunity to absorb all that the Eagle Institute has to offer. You’ll return to your school district an even more capable leader.

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President

John Musso, CAE, RSBA
Executive Director
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July 19-22, 2016
Williamsburg, VA

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*2015 Eagle Award recipients  
**Eagle Award recipient from a previous year(s)
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International Eagle Award Recipient

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Chief Financial Officer, Assistant Superintendent of Business Services and Operations
Hinds County School District
Raymond, Mississippi

Distinguished Eagle Award Recipients

Claire Hertz
Chief Financial Officer
Beaverton School District
Beaverton, Oregon

Louis J. Pepe, MPA, QPA, RSBA
Assistant Superintendent of Business
City of Summit Public Schools
Summit, New Jersey

Steven Stanfield, RSBO, SFO
Director of Business Services
DeSoto Parish School Board
Mansfield, Louisiana
2015 Eagle Award Recipients

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Summit, New Jersey

Steven Stanfield, RSBO, SFO
Director of Business Services
DeSoto Parish School Board
Mansfield, Louisiana
Schedule of Events

Tuesday, July 19

Arrive at The Williamsburg Lodge by 4:30 p.m.
310 S England St. Williamsburg, VA 23185

5:00 p.m.
Welcome Reception and Dinner*
Colony Foyer

6:00 p.m.
Welcome Dinner*
Colony Room AB

7:00 p.m. – 8:00 p.m.
Leading at a Turning Point
Presented by Jeff McCausland, Ph.D., retired U.S. Army Colonel and Founder and CEO of Diamond6 Leadership and Strategy, LLC

CPEs/SFOs: 1.0

Knowing your role is essential to ensuring district success. See how the Battle of Yorktown—a major turning point in the American Revolution—helps you understand what it means to lead during district turning points.

Learning Objectives:
1. Define leadership and how it differs at various levels in an organization.
2. Explain the key factors to consider when making a difficult decision for your organization.
3. Describe the fundamental challenges that George Washington faced at a critical juncture in the American Revolution.

**Wednesday, July 20**

*Breakfast at the Hotel**
Voucher for Traditions, Williamsburg Lodge

8:00 a.m. – 9:30 a.m.
**Branding! What Is Your Brand?**  
*Presented by Jeff McCausland, Ph.D., Diamond6 Leadership and Strategy, LLC*

CPEs/SFOs: 1.5

At a minimum, most brands "wear out" in roughly 10 years and need to be reconsidered, particularly when an organization is at a turning point. Examine your brand and your organization’s brand to determine its effectiveness.

**Learning Objectives:**

1. Explain what we mean by a *brand* and why it is important for individuals as well as organizations.
2. Discuss the *why and purpose* of an organization as critical factors in determining direction for the future.
3. Describe how organizations reevaluate their *brand* over time and determine if they need to *rebrand*.

9:45 a.m.
**Depart for The Abby Aldrich Rockefeller Folk Art Museum**

10:00 a.m. – 10:45 a.m.
**Tour: We Are One: Mapping America’s Road from Revolution to Independence**

"We Are One" maps the American road to independence. It explores the turbulent events that led 13 colonies to join to forge a new nation. Using maps, the exhibition traces the American story from the strife of the French and Indian War to the creation of a new national government.

10:45 a.m. – 11:45 a.m.
Explore the museum on your own

12:00 p.m. – 12:45 p.m.
Lunch

12:45 p.m. – 1:15 p.m.
The Battle of Yorktown and Its Significance in History
Presented by Mark Jackson, President, Guidon LLC.

CPEs/SFOs: 0.5

One of the final conflicts of the American Revolution, the Battle of Yorktown was a tremendous victory for the Continental Army. Explore how and why this victory was so essential in turning the tides in the war.

Learning Objectives:
1. Describe the value and importance of effective collaboration and communication when it comes to leadership.
2. Explain the value of followership and what it takes for your team to believe in your leadership style.
3. Identify the necessary steps to transition a dysfunctional team into a high-performing team.

2:00 p.m. – 2:30 p.m.
Activity: Yorktown Visitor Center Museum

2:30 p.m. – 4:30 p.m.
Seminar & Activity: Yorktown Battlefield
Presented by Mark Jackson, President, Guidon LLC.
Jeff McCausland, Ph.D., Diamond6 Leadership and Strategy, LLC

CPEs/SFOs: 2.0

The final major battle of the American Revolution, the Battle of Yorktown was the turning point in the nation’s quest for independence. Equip yourself with crucial leadership lessons as you view a place where they were truly lived out.
Learning Objectives:
1. Explain the difference between personal agendas versus team agendas.
2. Describe the value of relationship building with leadership and the willingness to take the lead in building relationships.
3. Discuss the importance of leading with a clearly set vision and the best ways to communicate that strategic vision to staff.

5:00 p.m.
**Happy Hour and Dinner**
Riverwalk Restaurant, Yorktown, VA
Enjoy a relaxing cash bar happy hour before dinner.

7:00 p.m. – 8:00 p.m.
**Thoughts About Today’s Experience**
*Jeff McCausland, Ph.D.*
Take time to reflect on what we have learned throughout the day and how we can apply those lessons.

**Thursday, July 21**
**Breakfast at the Hotel**
Voucher for Traditions, Williamsburg Lodge

8:00 a.m.
**Depart to The College of William and Mary**
Miller Hall, 101 Ukrop Way, Williamsburg, VA 23185

8:30 a.m. – 10:00 a.m.
**Nimble Organizations: Embracing and Adapting to Change**
*Presented by John Park, Ph.D., Baker Tilly Consulting*

CPEs/SFOs: 1.5

In our environment, change is a constant at a personal and organizational level. How we deal with and manage change will continue to be a key success factor in organizational
performance. Nimble organizations and leaders that are able to pivot and adapt to their environment can have a positive impact and position themselves for success. This session will review best practices in adapting to and managing change.

**Learning Objectives:**
1. Explain why nimbleness is vital to organizations' ability to deal with disruptive changes and maintain a strategic advantage.
2. Discuss how organizations can quickly and effectively adapt to change while continually delivering high performance.
3. Explain ways you can create an organizational culture where nimbleness and innovation can flourish.

10:15 a.m. – 12:15 p.m.
**Design Thinking and Central Office Leadership**
*Presented by Thomas W. Taylor, Ed.D., Superintendent, Middlesex County Public Schools, Saluda, VA*

CPEs/SFOs: 2.0

School district leadership in times of fiscal retrenchment requires revolutionary thinking. When operational efficiency dramatically affects performance and the bottom line, school business officials and other central office leaders must look at challenges through a new lens.

Design Thinking is a systematic, iterative, human-centered approach to solving tough, real-world problems that are often ill-defined and stubbornly immune to traditional problem-solving approaches. Design Thinking is a methodology for generating innovative solutions that are at the intersection of people’s needs, technological feasibility, and business viability. This seminar provides a hands-on introduction to Stanford University’s Institute of Design tools and methodologies and encourages participants to immediately put them into practice.

**Learning Objectives:**
1. Explain the five modes/stages of Design Thinking.
2. Describe the mindsets necessary for the implementation of effective Design Thinking.
3. Explain how to leverage the Design Thinking approach in your daily practice.

12:15 p.m. – 1:30 p.m.
**Lunch**
1:00 p.m. – 1:30 p.m.
Jamestown to Williamsburg: A Turning Point in the Life of the Colonies

The Jamestown colonists ensured the survival of their people and their establishment when they transitioned to Williamsburg. Learn from their strengths to keep unity during district change.

2:15 p.m. – 4:30 p.m.
Tour: Colonial Williamsburg

CPEs/SFOs: 2.0

See first-hand what life in the 1700s was like with this engaging, interactive tour of one of the most prominent colonies in the nation.

Learning Objectives:
1. Explain the most important factors of facilities management in the 18th-century.
2. Discuss the nation's founding principles and their role in developing citizenship skills.
3. Explain strategies that encourage civil discourse from multiple perspectives.

4:30 p.m.
Explore Williamsburg on your own

Friday, July 22
Breakfast at the Hotel**
Voucher for Traditions, Williamsburg Lodge

8:30 a.m. – 10:30 a.m.
Critical Thinking for Busy Leaders
Presented by Joe Doty, Ph. D., Executive Director, Dr. John Feagin Leadership Program

CPEs/SFOs: 2.0

As leaders move to the strategic level, issues increase in both complexity and ambiguity, and the consequences of decisions will be more far-reaching and serious. Examine the basic foundation and understanding of critical-thinking concepts and skills that leaders need to apply in their future responsibilities.
Learning Objectives:
1. Define what critical thinking is and identify its components.
2. Discuss the link between leadership and critical thinking.
3. Explain the risks to not thinking critically and the advantages to thinking critically.

10:45 a.m.
Wrap-up Panel Discussion

12:00 p.m.
Conference Conclusion and Lunch
CPE credits and SFO® Recertification Contact Hours
Earn up to 12.5 CPE credits in the Personal Development field of study.

Recertification Contact Hours
Earn up to 12.5 SFO contact hours.

To receive CPE credits and SFO contact hours you will need to complete the online evaluation. Online evaluations are available immediately following sessions. For CPE credits, you will also need to sign the attendance record that will be available at the end of each session. Attendees will have the option to print their certificate online after completing the evaluation. All sessions are a basic program level and require no program prerequisites or advance preparation.

Visit ASBO’s website for further details on CPE credits and SFO contact hours: www.aspointl.org/EagleInstitute.

*The welcome reception and dinner are the only events open to participants’ guests. For guests, there is a fee for the dinner.

**The Williamsburg Lodge’s restaurant, Traditions, located off the lobby, opens for breakfast at 6:30 a.m. Please allow sufficient time to enjoy the breakfast buffet and be ready to begin the morning activities on time.
Dr. Jeffrey D. McCausland
Founder and CEO, Diamond6 Leadership and Strategy, LLC

Dr. Jeff McCausland is the Founder and CEO of Diamond6 Leadership and Strategy, LLC (www.diamondsixleadership.com). For the past seven years Diamond6 has conducted numerous executive leadership development workshops for leaders in public education, US government institutions, non-profit organizations, and corporations across the United States. Participants have included the leadership teams for national education associations and large urban school districts representing hundreds of thousands of students throughout America.

He is also a Visiting Professor of International Security at Dickinson College in Carlisle, Pennsylvania. He serves as a Senior Fellow at the Stockdale Center for Ethical Leadership at the United States Naval Academy, and the Carnegie Council for Ethics in International Affairs in New York. From 2010 thru 2015 Dr. McCausland was the Distinguished Visiting Professor of Research and Minerva Chairholder at the U.S. Army War College. Prior to these appointments he was a Visiting Professor of International Law and Diplomacy at the Penn State Dickinson School of Law and Graduate School of International Affairs.

Dr. McCausland is a retired Colonel from the US Army and completed his active duty service in the United States Army in 2002 culminating his career as Dean of Academics, United States Army War College. Upon retirement Dr. McCausland accepted the Class of 1961 Chair of Leadership at the United States Naval Academy, Annapolis, Maryland and served there from January 2002 to July 2004. He continues to hold a position as a Senior Fellow at the Stockdale Center for Ethical Leadership at the Naval Academy.

He is a graduate of the United States Military Academy at West Point in 1972 and was commissioned in field artillery. He is also a graduate of the U.S. Army Airborne and Ranger schools as well as the Command and General Staff College at Ft. Leavenworth, Kansas. He
holds both a Masters and Ph.D. from the Fletcher School of Law and Diplomacy, Tufts University.

During his military career Dr. McCausland served in a variety of command and staff positions both in the United States and Europe. This included Director for Defense Policy and Arms Control on the National Security Council Staff during the Kosovo crisis. He also worked on the Treaty on Conventional Armed Forces in Europe (CFE) as a member of the Office of the Deputy Chief of Staff for Operations, US Army Staff, the Pentagon. Following this assignment he assumed command of a field artillery battalion stationed in Europe and deployed his unit to Saudi Arabia for Operations Desert Shield and Storm in 1990 and 1991.

Dr. McCausland has both published and lectured broadly on military affairs, European security issues, the Gulf War, and leadership throughout the United States and over thirty countries. He has been a visiting fellow at the Center for International Affairs, Harvard University; Conflict Studies Research Center, Royal Military Academy, Sandhurst; Stiftung Wissenshaft und Politik, Ebenhausen, Germany; George C. Marshall Center for European Security Studies, Garmisch, Germany; and the International Institute for Strategic Studies, London.

He has also served as a member of numerous panels on leadership and character development. These include the Chief of Staff Army’s Blue Ribbon Panel on Training and Leader Development; the Character Review Panel for the Superintendent, U.S. Air Force Academy; as well as providing advice and assistance to the Chief of Staff of the Air Force’s Aerospace Leader Development Panel.

Dr. McCausland is a senior fellow at the Clarke Forum at Dickinson College and a Senior Associate at the Abshire-Inamori Leadership Academy at Center for Strategic and International Studies (CSIS) in Washington. He is also an adjunct fellow at both CSIS as well as the RAND Corporation in Washington. He serves on the Board of Advisers to the National Committee on American Foreign Policy in New York, the Hourglass Initiative, and the Dreyfuss Initiative.

He has been a national security consultant for CBS television and radio since 2003. In this capacity he has travelled frequently to Guantanamo, Iraq and Afghanistan. Consequently, he has been a frequent commentator on the ongoing conflicts in both countries as well as other stories focused on national security for CBS since 2003. Dr. McCausland has also appeared on MSNBC, CSPAN, CNN, Al Jazeera, Al Ahurra, the CBS Morning Show, Up To the Minute, as well as the CBS Evening News. He has frequently interviewed by the New York Times, Christian Science Monitor, Wall Street Journal, and Boston Globe. He is married to the former Marianne Schiessl, and they have three children - Tanya, Nicholas, and Phillip.
J. Mark Jackson  
President, Guidon, LLC

Mark Jackson is President of Guidon, LLC., a Lancaster County, Pennsylvania-based leadership development firm. Jackson develops and delivers the firm’s unique leadership laboratory exercises. He has conducted this training for civilian and military organizations of the United States Government.

Jackson began his career as an Army officer, serving almost six years in both Germany and the United States. As a platoon leader for the 2nd Cavalry Regiment and operations and plans officer in the 82nd Airborne Division, Jackson was immersed in leadership situations.

Jackson joined Goodyear Tire Company’s sales and marketing team after his military service. His success qualified him for the role of manager, sales training for Cooper Tire and Rubber Company, based in Findlay, Ohio. In this role, he trained employees and customers on sales and marketing tactics as well as business planning. More importantly, he trained leadership and management skills. He conducted over 200 seminars and enhanced five existing programs. Jackson was a columnist for “Tire Review,” writing on business planning for the trade journal for the tire industry. According to the magazine’s editor, ratings for Jackson’s columns were the highest in the magazine’s history.

Jackson was promoted to Advertising Manager for Cooper Tire, where he headed up the company’s promotion/marketing efforts. His involvement spanned promotions and encompassed public relation, brand building and speech writing.

Jackson was next promoted to the Cooper Tire performance tire start up initiative. His
team was tasked with entering a new market segment, from inception to fruition. His team developed the product line, determined marketing and promotion efforts, trained employees and assisted in sales efforts.

Jackson returned to military service in 2008 and spent 2009 deployed in Afghanistan, where he was a Combat Advisor to the Afghan Armed Forces. He was awarded the Bronze Star and Combat Action Badge. The Washington Post printed an article that Jackson wrote about his experiences in Afghanistan. Since, the article has appeared in 30 other media sources, including an excerpted version on ABC World News.

Jackson holds a Bachelor’s of Journalism from Ohio University and a Master’s of Arts, Organizational Leadership from Gonzaga University. He is also a certified Master Resilience Trainer via The University of Pennsylvania and the U.S. Army. He holds a field role for Cooper Tire in Florida.

Jackson has combined his love of history with his leadership, training and business experience in creating GUIDON. Jackson has conducted history seminars for Antietam National Battlefield, Ohio Historical Society and numerous local historical societies. Resilience has been added to his repertoire within the past three years, but it has been transformative journey.

Jackson has deep experience bringing together history and modern business and leadership. Specifically he has trained at Gettysburg, Antietam, Monocacy, the Alamo and Yorktown. The specific experience at Yorktown includes training a group of L3 leaders on the battlefield in January, 2010. He has also trained on the battle of Little Big Horn, however from the classroom and not the battlefield. For over 15 years, Jackson trained and mentored senior U.S. Federal Government executives using a historical perspective. Today, he continues providing that experience for corporate clients.
John E. Park, Ph.D.
Baker Tilly

John, a firm director, maintains a targeted consulting practice where he works with his clients on issues related to strategic planning, change management, enterprise risk management and leadership development. He has multiple publications including co-authorship of the book "Creating in House Sales Development Programs" and regularly speaks at regional and national conferences.

Specific experience
- Supports the firm’s internal management and leadership development initiatives.
- Member of team focused on establishing Baker Tilly’s new program to develop leaders who embrace our values and principles. The program is being designed to help our professionals formulate effective management and business development attributes, enhance their leadership capabilities and engage in continuous development.
- Prior to joining Baker Tilly, John was the associate director and assistant professor of management development at the Pennsylvania State University, where he held affiliate faculty status in the School of Hospitality Management.
- Before joining the Penn State faculty, John was the commercial lines manager and assistant vice president for an insurance agency, a commercial underwriter for Pennsylvania National Insurance and a senior casualty underwriter for Commercial Union Insurance. He has also been involved in the ownership and operation of a family owned school bus business and recreational campground for over 25 years.

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- American Institute of Certified Public Accountants
- Pennsylvania Institute of Certified Public Accountants (Education Committee)
Education

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- Pennsylvania State University
  - Doctor of Education
Dr. Thomas W. Taylor
Superintendent, Middlesex County Public Schools

Dr. Thomas W. Taylor is the superintendent of Middlesex County Public Schools, located between the Rappahannock and Piankatank rivers in Virginia’s rural Middle Peninsula. Dr. Taylor is also an adjunct professor of educational leadership at the University of Virginia’s Curry School of Education. Prior to the superintendency, Dr. Taylor served as the high principal in Charlottesville City, an assistant principal and school improvement specialist in Virginia Beach, and he was also a social studies teacher in Chesapeake and Virginia Beach. Dr. Taylor holds a Bachelor of Arts degree from Virginia Wesleyan College as well as Master’s and Doctoral degrees in education leadership and policy from the University of Virginia. Dr. Taylor also recently earned a Master of Business Administration degree from the College of William & Mary. Dr. Taylor is the father of three daughters and an award-winning teacher and school leader, specializing in organizational dynamics, school finance, and leadership development.
Joe Doty is the Executive Director of the Dr. John Feagin Leadership Program and Associate Director of the Leadership Education and Development (LEAD) curriculum at the Duke University School of Medicine. He recently returned from three years in Singapore working as a leadership and ethics advisor. Joe is a graduate of the U.S. Military Academy, West Point NY, and served in both educational and leadership positions during his 28 years in the Army.

An avid reader and writer, Joe enjoys thinking, learning and helping others think and learn. He is an avid sports and current affairs fan, enjoys yard work, fitness and a good cup of coffee.

Joe received Masters Degrees from Indiana University and the Naval War College and earned his PhD from the University of Northern Colorado. He has a passion for leadership, ethics, character development, mindfulness, and teaching. Some of the courses he taught at West Point include Leadership and Ethics in Sports.
Leadership at a Turning Point!!!

When you come to a fork in the road...take it!

Dr. Jeffrey D. McCausland
Founder and CEO
Diamond6 Leadership and Strategy, LLC
What was not contained in my bio!

- Me and Rush Limbaugh...
- Criticized in Pravda...
- My interview about Paris Hilton...
Why in the hell would you name a company Diamond6?

Feel free to interrupt me...I will ask questions.

Have you been to Vegas?

If you start taking your shoes off...I am outta here!!!!
This is a workshop for leaders....So.....

How do you define leadership????
"Leadership is the ability to decide what has to be done, and then get people to want to do it!"

- **Management** = work standards, resource allocation, and organizational design
  - Controlling complex institutions
- **Leadership** = vision, motivation, and trust
  - Moving people and organizations into the future
  - Dealing with change...

Is there anything missing from this definition???
Were these “good” leaders?

If so why?
If not -- why not?

Values!
What do you stand for?

But what do leaders do that is unique???
Turning point

*noun*
noun: **turning point**; plural noun: **turning points**

definition: a time at which a decisive change in a situation occurs, especially one with beneficial results.

"this could be the turning point in Nancy's career"

**synonyms:** crossroads, critical moment, decisive moment, moment of truth, watershed, crisis, landmark, inflection point
The Three Levels of Leadership

Strategic Leadership

Org Leadership

Direct Leadership
Direct Leadership

✓ Face to face

✓ Team work

✓ Action and task oriented

✓ Executor of policies

✓ Motivation

✓ Cohesion
Organizational Leadership

- Organizational hierarchy
- Internal organizational focus
- Sustain and maintain the organization
- Planning and direction
- Interpret
- Climate
...the art of influencing people and organizations to achieve a vision by influencing culture, allocating resources, promulgating policy, and building consensus to accomplish interests.

Dealing with change...**Remember** -- ”if you don’t like change...you will like irrelevance even less”

**Strategic leadership can be a collective or individual effort...**
What are Critical Questions to ask?

• What is the problem? *(Focus)*
• Who are we? *(Identify)*
• Where are we? *(Assess)*
• Where should we go? *(Decide)*
• How do we get there? *(Implement)*
• Are we getting there? *(Assure/reassess)*

What is the most difficult?
“If I were given one hour to save the planet, I would spend 59 minutes defining the problem and one minute resolving it”

Albert Einstein

“Slump? I ain’t in no slump....I just ain’t hitting....”

--Yogi Berra
What kind of problem is it???

Existence of a problem does not mean a solution exists...
Who are we? Who are our stakeholders?
Who are we --- Our Stakeholders

- Students
- District leadership
- Administrative Staff
- Faculty
- Board of Education
- Peer organizations
- District Staff
- Parents
- Professional Oversight Orgs
- Industry in community
- State Government
- Federal Government
- Community Government
- Others?

How do we get them on board?
"If you don't know where you are going, you might wind up someplace else."

-- Yogi Berra

Remember Alice in Wonderland?
Where are we?

“You can observe a lot by watching…”
-- Yogi Berra
Where should we go? How do we get there?

RELATING ENDS, WAYS & MEANS

“A nickel ain’t worth a dime anymore...“

-- Yogi Berra

WHAT ABOUT RISK???????
PROCESS PROVIDES STRATEGIC DIRECTION

“Ends”
- Purpose
- Vision
- Mission
- Values

“Ways”
- Strategic Goals
- Action Plans
- Policies for subordinate org
- Leader’s Strategic Initiatives

“Means”
- Prioritize, Resource, & Program

Assessments & Feedback

Creates alignment throughout the organization...
How are we all contributing?
How are we doing??
Strategic Planning includes:

- Mission Statement
- A Vision
- Core Values (Attributes)
- Goals and Objectives – *Do they fit in moving towards the mission and vision statement?*
Is this an effective mission statement???

“Our old mission statement was more eloquent, and dignified, but not nearly as effective.”
Mission Statement - the “guiding star”

- Key to organizational growth and survival
- Set of beliefs about its core competencies, values, and basic functions in society.
- Balances the needs of all stakeholders.
- Invaluable strategic planning tool.
- Can be limited by organizational culture.

What is our function in the larger scheme of things?

What justifies our continued existence?

Organizational Culture and Leadership by Edgar Schein
Chris Nassetta, President and CEO Hilton Worldwide

We have over 300,000 people, and what I discovered when I joined the company five years ago is that we had a lot of segments of the company that operated very independently, and we had massive amounts of duplication and fragmentation. **We needed alignment. We needed people to understand who we were, what we stood for and the key priorities of the company.** And we needed them, once they understood that, to get their oars in the water and head in a common direction. I have spent most of my time in the last five years around building that culture, and getting that alignment.
What is the vision for the organization?

“...is a mental image of what the future world ought to be like.”

- The prophet’s view

“It is important not to mistake the edge of the rut for the horizon”

- Anonymous

The future ain’t what it used to be....

-- Yogi Berra
Why Vision?

- A vision points direction, provides focus, and promotes change.
- A vision inspires individuals and enables strategic alignment, synchronization, & synergy.
- A vision provides context for decision making, resource allocations, & organizational development.
- A vision is the fundamental basis for strategic thinking, planning, and programming.

“Without vision, the people perish” (The Bible)
“Without passion for the vision, the vision perishes”
“Action without vision is stumbling in the dark; vision without action is poverty-stricken poetry” (Warren Bennis)
Characteristics of Visions

- **Clarity** ... provides focus
- **Communicable** ... provides understanding
- **Comprehensive** ... provides holistic approach
- **Transformational** ... provides for action & the future
- **Compelling** ... provides inspiration

“A Man on the Moon this Decade”
JFK, 1961

How do you communicate it, excite people, and get “ownership”? 
1. ENDLESS POSSIBILITIES
2. THE REAL THING
3. DRIVERS WANTED
4. THINK DIFFERENT
5. FIND YOUR OWN ROAD
6. PEOPLE MOVING IDEAS
7. IN TOUCH WITH TOMORROW
8. IT'S ALL WITHIN YOUR REACH
9. GO FARTHER
10. WHERE DO YOU WANT TO GO TODAY
11. JUST DO IT!
Answers

1. ENDLESS POSSIBILITIES -- *Liz Claiborne*
2. THE REAL THING -- Coca Cola
3. DRIVERS WANTED* -- Volkswagen
4. THINK DIFFERENT -- Apple
5. FIND YOUR OWN ROAD -- Saab
6. PEOPLE MOVING IDEAS -- GTE
7. IN TOUCH WITH TOMORROW -- Toshiba
8. IT'S ALL WITHIN YOUR REACH -- AT&T
9. GO FARTHER -- Izuzu
10. WHERE DO YOU WANT TO GO TODAY? – Microsoft
11. JUST DO IT! -- Nike

“I really didn’t say everything I said!”

-- Yogi Berra
A reality of Strategic Leadership and Planning....

Organizations have to execute while conducting planning and change...
Are we getting there? Or howling at the moon?

“My question is: Are we making an impact?”
What does the whole process look like?

- Conduct an Assessment
- Define the Purpose
- Refine the Vision
- Restate the Mission
- Identify our Values
- Update the Strategic Goals and Objectives
- Formulate a Strategic Plan
- Update Policies & By-Laws
- Resource the Plan
- Implement the Plan
- Assess the Outcomes
- Revise the Plan

Requires Leaders and Followers to be Engaged!

This is a dynamic process and not an event……..

“It ain’t over until it’s over...”

--Yogi Berra
A Fundamental Truth about planning and decisionmaking!

“You have enemies? **Good.** That means you’ve stood up for something, sometime in your life.”

-Winston Churchill

Remember as you develop a strategy your enemy (or competition and the environment) gets a vote as well!

**The other teams could make trouble for us if they win.”** -- Yogi Berra
The Battle of Yorktown – a turning point!

September 28 – October 19, 1781
On New Years Day 1781 resentment erupted when 1500 Pennsylvania Continentals mutinied at Morristown. This was followed by several hundred from New Jersey. Washington would talk to the leaders but did order three ringleaders shot by a squad from their own ranks...
Washington’s goal in Jan 1781 is to recapture New York!
Washington takes a risk....it is a **turning point**....

- **Focus**
- **Identify**
- **Assess**
- **Decide**
- **Implement**
- **Reassess!**
The rest is history!!!
“90% of the game is half mental...”
-- Yogi Berra
Branding

Dr. Jeffrey D. McCausland
Diamond6 Leadership and Strategy, LLC
brand  noun  \’brand\n
vs.

branding  verb  \’ bran-din\"
brand

noun  \’brand\`

sum of the perceptions that are held about

– you
– company or organization
– products or services
Identify your Personal Brand?

1.0 Answer the following questions.
1.1 What results do you want to achieve in the next year?
1.2 What do you wish to be known for?
1.3 Define your identity
1.4 Construct your leadership brand statement, then test it.

2.0 Create your own purpose
• Purpose
• Mission
• Values

OK...let’s make an assessment!

“I want to be known for being __________ so that I can deliver __________.”
My personal crossroad -- How do I create a LEGENDARY Personal Brand?????

Awareness - control your awareness.
  "What am I focusing on?"
  "What do I know about ______?"

Beliefs - develop empowering beliefs structures that will create the reality you WANT
  "Why am I doing this?"
  "Why is this important to me?"

Courage - harness the courage to challenge yourself and take uncomfortable action.
  "Is this truly what I want?"
  "What am I willing to do to make a change?"

Personal brand is what people say about you when you leave the room.

- Jeff Bezos, Founder, Amazon.com
Washington’s Personal Brand!

“Gentlemen, you will permit me to put on my spectacles, for I have not only grown gray but almost blind in the service of my country.”

-- George Washington

The Newburgh Conspiracy!
“alright Jeff what's next?”
The Leadership turning point.....

Rebrand 10-20 years

- becomes outdated
- Customer/client values change i.e. Marketing 3.0
- create new products or services
- launch new companies or organizations

How many of you have opened (or closed...) a school in your district or initiated a major new program (i.e. On Line Learning)?
emotional response about an:
  -- organization,
  -- product,
  -- service.
What do you think when you see these?
Chipotle’s Food Poisoning Issue Is Nationwide.

People keep eating at Chipotle, people keep getting sick.

-- Huffington News
We have broken the most important part in our vehicles: your trust.
branding  verb  \'bran-din\'

Branding is the act of creating a brand.
What is an example of an organization that is rethinking their brand?

Instead of risking anything new, let's play it safe by continuing our slow decline into obsolescence.
It is all about the Brand!

Even REALLY BIG organizations sometimes realize that they need to rebrand!
Is it the “Czech Republic” OR “Czechia”?
Branding is…

the universe of activities you undertake that affects those perceptions.
Brand

Brand Identity

Logo
understand needs & wants of stakeholders
Why do Brands matter?
Create differentiation from competition

Communicate the value add that products or services provide

Provides piece of mind of quality, origin, and performance

Increase perceived value

Reduce the complexity involved in the buying decisions
Is there anything remarkable about a herd of cows?
But what if there was one purple cow???
Purpose
What is the purpose of a non-profit or a public service organization like yours???
Greater Purpose

“It is not what you sell it is what you stand for” - Roy Spence and Haley Rushings.

the reason any organization exists.
Purpose creates...

energy and relevance to a organization & its brand.

creativity, innovation and organization commitment.

extraordinary engagement among all stakeholders

purposeful decision making

excellence at delivering exceptional performance over the long term
Your Purpose is tied to being a Professional….

Someone who does for a society the expert work needed for their flourishing and which they cannot do for themselves...

- The work is truly expert work. (At what degree of risk, however, will vary.)

- The individual has been officially certified to the client (society) by a profession.

- By observation and evaluation it is clear that the individual has the moral character for, and is called to, far more than a job; rather, to honorable service of effective and ethical practice on behalf of the client (rather than self or institution).

Leaders have to talk about this with new members in the profession!
Disney
To use our imaginations to bring happiness to millions.

Amazon
To build a place where people can come to find and discover anything they might want to buy online.

Southwest Airlines
To give people the freedom to fly; make air travel accessible to the average person

Walmart
To make quality goods affordable and available to rural USA.

Toys ‘R’ Us
Put joy in kids’ hearts and a smile on parents’ faces.

Apple
Insanely great technology, appearance, value, simplicity and fun of their products

Nike
To bring inspiration and innovation to every athlete in the world. If you have a body, you are an athlete.

Google
To organize the world’s information and make it universally accessible and useful.
Why?
“the Purpose”

How?
“value proposition”

What?
“Products/service”

http://www.youtube.com/watch?v=l5Tw0PGcyN0v
Example: Apple

**Why?**
In everything we do we believe in challenging the status quo. We believe in thinking differently.

**How?**
The way we challenge the status quo is by making our products beautifully designed, simple to use, and user-friendly.

**What?**
We just happen to make great computers. Want to buy one?”
Branding
A Review
Rebrand 10-20 years

- becomes outdated
- customer values change i.e. Marketing 3.0
- create new products
- launch new companies or organizations
Exercise
How to identify our brand and our why/purpose?
How do we go about rebranding???

The best way to identify your unique brand is to ask the people who interact with you and your organization. Your colleagues!!

Interview all of your organization’s stakeholders: employees, customers, potential customers, competitors, and community.

You want to know why they like working with you, what value they get from you that they can’t get elsewhere, and why they would recommend you to others.

If you can’t, then concentrate on your customers and employees if you have them.
Interview colleagues and stakeholders
Interview your colleagues at Williamsburg!
WHAT'S YOUR Purple Cow?
use markers and poster boards
Instructions

1. Complete the questionnaire individually – 10 min
2. Share thoughts amongst your table – 10 min
3. Elect Spokesperson
4. Agree on 1-3 Whys
5. Spokesperson present to group
   - common themes
   - Present table’s “results”?
   - What is your “Why”? 
20 minutes
“Progress is impossible without change, and those who cannot change their minds cannot change anything.”

George Bernhard Shaw
Leadership at the Crossroads

The Battle of Yorktown

ASBO Eagle Institute
Williamsburg, Virginia
July 2016

Mark Jackson, LTC (retired)
The American Soldier: Myth & Fact
The British Soldier: Myth & Fact
Allied Troops: Hessian and French
The Revolutionary War: Nothing romantic or quaint
A Conflict of Grit and Courage...
...As Brutal and Desperate as any American War
By 1781 the war devolves into a stalemate centered around New York...
George Washington
Nathaniel Greene
Jean-Baptiste Donatien de Vimeur; Count Rochambeau
François Joseph Paul de Grasse
Sir Henry Clinton
Lord Charles Cornwallis
Admiral Thomas Gates
Both Cornwallis and Greene attempt to break the stalemate in the Carolinas
The Southern Campaign: Fluid and Nasty
Winning “Hearts and Minds” in Virginia?

“...ravaging, plundering, and destroying everything before them....”
...and then, Washington and Rochambeau roll the dice...
Assembling the Allied Forces, 1781

- Allied army of Washington & Rochambeau
- De Barras, with French siege guns
- British fleet arrived 5 Sept. Battle of the Capes (5-8 Sept)
- De Grasse’s French Fleet arrived 30 Aug
Yorktown: The Contending Armies

Allied Army
Yorktown Campaign
Total: 16,000

British Army
Yorktown Campaign
Total: 7,500
The Battles of the Capes: Key to American success
The Yorktown Siege
Life in the trenches: dirty and dangerous...
...Punctuated by sharp, intense action
Questions
The Virginia Campaign: *Dramatis Personae*

- LTG Washington
- MG Lafayette
- MG von Steuben
- VA de Grasse
- LTG de Rochambeau
- LTG Clinton
- LTG Cornwallis
- RA Graves
Design Thinking
and Central Office Leadership

Eagle Institute
Leadership at a Turning Point
July 21, 2016

Thomas W. Taylor, Ed.D., M.B.A.
Superintendent
Middlesex County Public Schools (Virginia)
Learning Objectives

1. Participants will develop a working knowledge and understanding of the five modes/stages of Design Thinking.

2. Participants will develop an understanding of mindsets necessary for the implementation of effective Design Thinking.

3. Participants will be able to leverage the Design Thinking approach in their daily practice.
What is **Design Thinking**?

the systematic, iterative, human-centered approach to solving tough, real-world problems that are often ill-defined and stubbornly immune to traditional problem solving approaches.

the methodology for generating innovative solutions that are at the intersection of people’s needs, technologically feasibility, and business viability.
Design Thinking: Systems/Stages/Modes

- Empathize
- Define
- Ideate
- Prototype
- Test
a focus on mindsets

Human Values – empathy for end user

Crafty Clarity – creating a coherent vision from messy problems

Bias Toward Action – this process is more about doing than thinking

Experimentation – finding innovation in unlikely places

Radical Collaboration – seeking breakthrough from diversity of thought

Mindfulness – awareness of what you are doing, how you are doing it, and why you are doing what you are doing
Empathy: What

the action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experiences of another
Empathy: What

the action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experiences of another when you feel what the other person is feeling when you can mirror their expression, their opinions, and their hopes.
Empathy: How

**Observe.** View users and their behavior in context of their lives.

**Engage.** Interact with and interview users through both scheduled and short “intercept” encounters.

**Immerse.** Experience what your users are experiencing.
# Empathy: How

<table>
<thead>
<tr>
<th>Method</th>
<th>Needs-uncovering technique</th>
<th>Information Obtained</th>
<th>Major Benefits</th>
<th>Major Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Ethnography</td>
<td>Be a user</td>
<td>• Tacit knowledge</td>
<td>• Obtain knowledge in depth</td>
<td>• Hard to transfer knowledge to others</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Feature trade-off impacts on product function</td>
<td>• Generate irrefutable belief in identified needs</td>
<td>• Time and expense</td>
</tr>
<tr>
<td>Observational Ethnography</td>
<td>Watch users critically</td>
<td>• Process knowledge</td>
<td>• Learn customer language</td>
<td>• Time and expense</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Tacit knowledge</td>
<td>• Find unarticulated needs</td>
<td>• Must translate observations into words</td>
</tr>
<tr>
<td>Intercept &amp; In-Depth Interviews</td>
<td>Interview users for needs</td>
<td>• Large number of details</td>
<td>• Speedy information collection</td>
<td>• Cannot elicit reliable tacit and process needs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Context-specific needs</td>
<td>• Information breadth</td>
<td>• “Marketing’s job”</td>
</tr>
</tbody>
</table>
Empathy: How

- Observational Ethnography
  - Watch

- Participant Ethnography
  - Do

- In-Depth Interview
  - The Beginner’s Mindset
  - Offer no judgment
  - Question everything
  - Be truly curious
  - Find patterns
  - Listen; really listen
Empathy: How

Great Interviews

• Start with a meaningful research question that clearly defines the investigation, sets boundaries, and provides direction.

• Ask “why”
• Ask about feelings
• Provoke stories
• Questions shouldn’t be binary or leading

• Identify gaps

• Answers help you to develop a picture of your user
Empathy Map

What does (s)he **think and feel**?
- What are his goals & objectives?
- What is really important to her (including what she might not tell others)?
- What emotions does he experience?
- What bothers him?

What does (s)he **hear**?
- What do his peers say?
- What do influential authority figures say (immediate supervisor, other leaders)?
- What do his friends say?
- What does he hear in the press/media?

What does (s)he **see** in his environment?
- What is her workplace like?
- Who are his co-workers?
- What groups does she interact with?

What does (s)he **see say and do**?
- What is his attitude?
- What could he be telling others?
- What might he be doing (if anything) that conflicts with what he says publicly?
Empathy Map

What is his **pain?**
- What are his biggest frustrations?
- What obstacles stand in the way of his goals?
- What risks does he fear?

What could he **gain?**
- What does he really want to achieve or gain?
- How does he measure success?
- What strategies could he employ to achieve his goals?
Define: What

Synthesis of research, the effort of bringing clarity to what you have learned

Requires:
Development of a “Point of View” statement, the clearly explains where users are coming from
Define: How

- Articulate findings, questions, insights
  - Clearly delineate what you learned
  - Ask what you still don’t understand or would like to know more about.

- Develop a Point of View statement
  - Determine who the end USER is, what they NEED, because of your INSIGHT
  - Reframe the “challenge” into an actionable re-statement of the problem into narrow and unambiguous terms.
**Ideate : What**

Idea generation! This is the **EXPLOSION** of concepts and potential outcomes that flare from the mild to the wild.

**Requires:**
Large quantities of ideas – good, bad, crazy, outrageous, ingenious; checking your biases

Seriously...no judgements and lots of volume
Ideate: How

• Brainstorm #1 – General Topics
  • Ask: “How might we...” in response to the Point of View Statement

• Brainstorm #2 – Solutions
  • Individual brainstorm about potential products and services that might improve quality of life through enhanced mobility
  • Group discussion of ideas presented, tools applied to suggested ideas
  • TOOLS used (required several rounds of discussion):
    • Voting
    • Substitution/Combination/Modification
    • Alternate/Reverse use
    • Re-Voting
  • Categorization:
    • Most delightful
    • Most likely to be effective
    • Potential breakthrough
Ideate: How
Ideate: How

Things to keep in mind / ideals to aim for...

- Step beyond the obvious solution --> increasing the possibility of innovation
- Harness collective perspectives and strengths of your team
- Uncover unexpected areas of exploration
- Involve unusual stakeholders (like a student)
Prototype & Test: What

Getting your ideas out of your head and into the physical world; **rough and rapid** – an experience for test users to gain empathy for the end user’s experience and potentially inspire innovation.

The inherent goal is to refine solutions and learn more about your end user.

**Requires:**
Thinking about and engaging users in a new way; have multiple options for test-users to experience and provide feedback.
Prototype: How

- Prototype - Create!
  - Think about what you are trying to learn.
  - Create a **low-resolution** experience: This could be anything: a post-it note, a picture, a storyboard, an object, or a space – anything that allows a user to experience your potential solution.

- Refine solutions
  - Evaluate the experience: Allow opportunities for feedback, refinement, or complete reboot.
Test: How

• Probe, not sell!
  • Not and evaluation of feasibility
  • Actively observe instead of sell - solicit explanations of the test user’s experience; ask “why” to gain more empathy
  • Tools: Focus groups, surveys, beta testing
  • Show, don’t tell; do not influence the experience
    • If it is necessary to explain in detail what users should do, then it is time to go back to the drawing board

• Refine solutions
  • Evaluate the experience: Allow opportunities for feedback, refinement, or complete reboot
  • Suggested tool: Feedback grid
CHALLENGE TOPICS

Improving the Process for Field Trips

Improving Student Health

Lowering Student Bus Discipline
1. **Empathy**
   - Normally you would conduct extensive research outside of your team; for the sake of time, discuss among yourselves the various perceptions possessed by potential stakeholders (users) in the topic selected.

2. **Design**
   - Create a Point of View Statement that synthesizes your data and that expresses the need to solve a problem.

3. **Ideate**
   - Ask a “how might we...” question in response to your Point of View statement.
   - Generate a wide range of possible solutions and narrow down your solutions to just one worth prototyping

4. **Prototype**
   - Create a prototype of your potential solution.

5. **Test**
   - Test your prototype with another group, got down some feedback.
Helpful Materials

Stanford d.school. The Bootcamp Bootleg.  

The Design Process Mini-Guide. 

The Field Guide to Human-Centered Design  http://www.designkit.org/resources/1/

Liedtka, Jeanne & Ogilvie, Tim (2011). Designing for Growth – a design thinking tool kit for managers

Brown, Tim (2009). Change by Design

Thomas Taylor, Ed.D., M.B.A.  
thomas_taylor@ccpsnet.net
Thinking Critically, Reasoning, and Judgment (while being busy)

By Joe Doty, PhD
Let’s Discuss......

• What does it mean to *think critically*?
  – Give some examples.....

• What does it **NOT** mean to think critically?
  – Give some examples....

• Is it important to be able to think critically?
  – Why or why not?
The opposite of Critical Thinking......

• Mindlessness....Day dreaming....
• **Not being present**...”I’m too busy....”
• Not thinking about your thinking....
Mindfulness.....

- Meta cognition.....thinking about your thinking....being present in doing what your are doing.....being in the moment....

....intentional awareness to the content (depth, breadth, biases, origin) of your thinking.....
Story of the pot roast in the pot......
Considerations for Critical Thinking…..

• Diversity of thought... “What do you think?”
• Looking at issues from many angles
• Perspective taking....practicing empathy
• Challenging assumptions
• Distinguishing between facts and beliefs/opinions
• Being open to errors in your thinking....
Have you ever said this?

“That is a great idea!.... I never would have thought of that”
Challenges to Thinking Critically

- Emotions
- Lack of information
- Emotions
- Biases/Mental models
- Emotions
- Being rushed
- Emotions
- Group Think/peer pressure/boss pressure
Can you think about something that you can’t think about?
How do we think?

• Deductive....’top-down’
• Inductive....’bottom-up’
• ‘Emergency’ ....fit of rage or life/death situation
• Mindlessness.....day-dreaming
• Knowing what you know
• Knowing what you don’t know
• Knowing what you can know
• Knowing what you can’t know
Universal Intellectual Standards
(by Paul and Elder)

• **Clarity**…”Elaborate further” ...”Express that point in another way”
• **Accuracy**…”Is that really true?”...”Is that a fact or an opinion?”
• **Precision**…”Can you get more details?”...”Can you be more specific?”
• **Relevance**…”How is that connected to what we are discussing?”
• **Depth**…”Are we getting to the complexity and many factors of this issue?”
• **Breadth**…”From what other perspective can we look at this?”
• **Logic**…”Does all this make sense?”....”Does this flow logically?”
• **Significance**…”Are we focused on what is most important?”
• **Fairness**…”Do we have biases that are skewing our thinking?”
Tell me something about your personality that you don’t know.
What does Critical Thinking have to do with Leadership?

- Should leaders be able to Critically Thinking? Why or why not?
Why is Critical Thinking Important?

- Decision making
- Problem solving
- Analyzing issues

Reasoning resulting in Sound Judgment
Two ways of seeing same behavior......

• Brutally honest or lacks tact?
• Soft hearted or weak?
• Consistent or rigid?
• Impulsive or spontaneous?
• Thoughtful or indecisive?
• Confident or arrogant?
• Intense or over-emotional?
• Friendly or flirty?
Examples

- Space Shuttle
- Mann Gulch Fire
- Penn State Football
- Bystander Intervention
- Cuban Missile Crisis
- Seattle Seahawks Super Bowl ending
- Neville Chamberlain
- WMD/Iraq War
“It is a sad fact of loyalty....that it invites single-mindedness”

Marcia Baron, Prof of Philosophy, Indiana Univ
How can we develop critical thinking skills?

- Practice...talk to others....be open to new knowledge
- **Intentionally** think about your thinking
- Practice....talk to others....be open to new knowledge
- Self-awareness
- Practice....talk to others....be open to new knowledge
- Challenge your thinking (it’s OK to be wrong!)
“Do not hold the depth of sincerity with which you or others hold an idea, or the number of people who sincerely hold an idea, with its validity”

“But understand that you will vulnerable to the curse of the highly intelligent, highly educated and highly successful: *this curse is the illusion of certainty*; the conviction of the omnipotence of your ideas.”

Bilahari Kausikan, Ambassador at Large, Ministry of Foreign Affairs, Singapore
Summary: Critical thinking is about being VERY open-minded to what you know, don’t know (can’t know?), biases in your thinking, and being open to being wrong.......
What else?
THANK YOU!!!!