A Guide to Using the Accomplishment Model[©]

Reflexus Company
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Section 1 Introduction: Why the Accomplishment Model?

> *"Performance 1. a : the execution of an action*
> *b : something accomplished"* Websters [1]

Introduction

The management sciences have tended to view modern organizations from a perspective of complexity. In my studies I have found that insights into performance and success in today's organizations are quite simple. Much like a sports coach in order to improve performance I suggest we study it. I have conducted studies of performance and well-being over the past 22 years and have found that value is created in social networks. There are re-occurring patterns in these social networks that generate innovation, knowledge and performance improvement that can be used to improve performance and well-being. These patterns include globalization, self-organization, collaboration, horizontal connections and the data based coordination of action.

Globalization

Studying the locations of a fortune 100 business between 1984-2004 we can witness the emergence of a global economy.

Fortune 100 Corporate Locations 1984

Locations (shown here in green) could be managed by executives traveling mostly between North America and Western Europe.

Fortune 100 Corporate Locations 2004

Twenty years later, we can see that the same fortune 100 company has expanded and become a global enterprise with its locations distributed across continents, countries and cultures. Executives and global staff try to manage the enterprise by traveling across the world's locations (shown here in blue), while the workforce coordinates work by using technology including email, fax, telephone, conference calls, video conferences or telepresence.

Self Organization

The graphics showing the expansion in locations of a fortune 100 company are abit misleading. While the distribution of locations are accurate, the social structure or pattern of relations across the enterprise are not static but dynamic. My research has shown that social networks are self-organizing and constantly changing as new people enter the network, people who have been in the network leave and relations amongst those in the network strengthen and weaken depending upon what the aim of the network is at any given time. Self-organization is a process of social circulation as people maximize their performance. This is why social networks are so efficient. They do not require any outside coordination, change management or overhead costs associated with telling them what to do.

In studying social networks over time we can map self-organization and circulation.
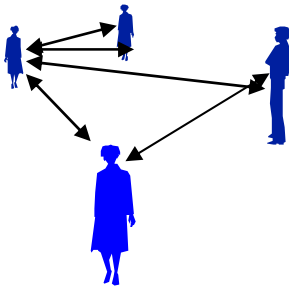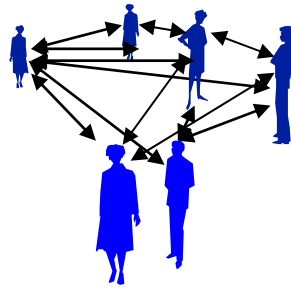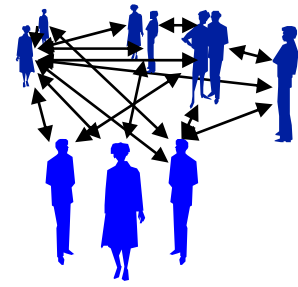
Week 1   Week 2   Week 3

Collaboration

To understand performance we simply need to follow the path of joy. With the help of executives and workers I identify value being created, such as a new product launch, a reduction in quality errors or an increase in productivity. Once this is done, I meet with those who contributed to the accomplishment and ask, *"With whom did you collaborate?"* I can then go about surveying those identified by asking the same question. In 22 years of studying social networks I have found that value and well-being are created in collaborative social systems. I define a social system as a social network where everyone accepts everyone else as a potential contributor. As the Chilean cultural biologist and philosopher Dr Humberto Maturana has pointed out, the only human emotion that expands intelligent action is love [2-4]. He is not referring to a romantic notion of love but a human relation where one accepts oneself and others as legitimate others in the course of their activities. This is how he defines social systems- "*I think only relationships in the emotion of love constitute social systems. Or put differently, if there is love, what appears in the interpersonal relations is a social system; without love there is no social system.*"[2] The social system structure optimizes performance. In studying social system maps we can see that everyone is connected through bi-directional relations (shown above as arrows) to everyone else in the social network. Social systems optimize performance because of the reciprocal nature of the relationships. The mutual acceptance of everyone by everyone else allows talent, insights, ideas and

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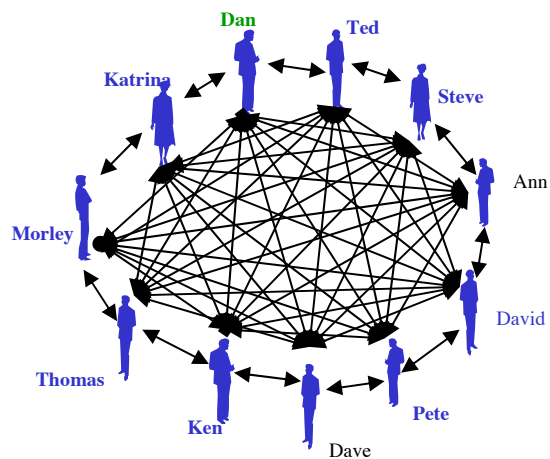
knowledge to move quickly to wherever it is needed in and by the organization and by doing so improves the productivity of the group.

Horizontal social connections

When I plot those in the social system against a company's organizational chart I have discovered that social collaboration occurs horizontally across the organization. The social structure not only connects contributors across the organization chart (the yellow boxes identify those in the social system) but also connects people to external companies, customers and other institutions.
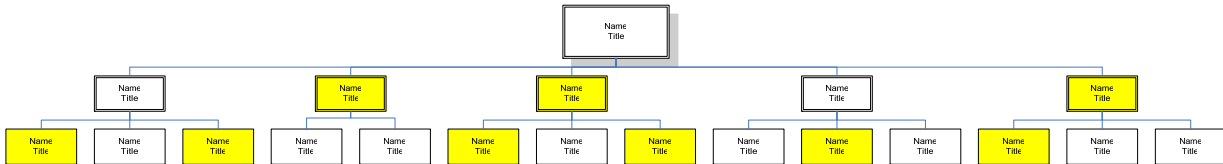
In most all cases the only manager whose authority spans the social system is the CEO.

Data based coordination of action

My studies have also shown that social system performance is optimized in recursive learning cycles. In 1939, Dr Deming and statistician Walter Shewhart created a model for continuous quality improvement [5]. They viewed the existing process for performance improvement as being linear and based on inspection and compliance which they characterized as the *"Old"* method:

   I.Specification => II.Production => III.Inspection

They replaced this method with a *"New"* method, that they viewed as a process for acquiring scientific knowledge *"forming a sort of spiral gradually approaching a circular path."* [5]
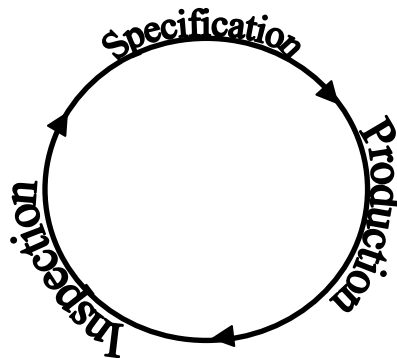
Dr Deming continued to develop this learning cycle over his career and left us with this last description in 1993 [6]:

```
        Plan
   Act         Do

        Study
```
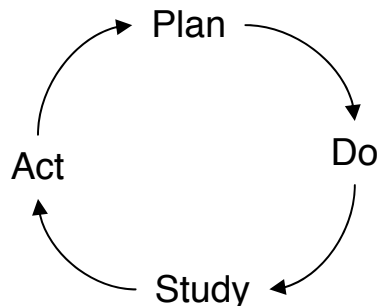
In 1994 I found that companies invested in the plan-do phases of the improvement cycle but rarely implemented the reflective study-act phases of the cycle. I also discovered that by inverting Deming's improvement cycle by having *study* precede *planning* that the plans were much better in quality and more likely to improve efficiencies [7]. I found that this was implicit in how performance improved in social networks as the group studied what they wanted to accomplish:

```
        Study
   Do          Act

        Plan
```
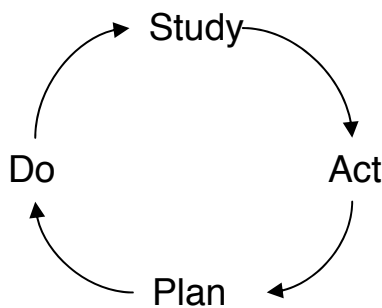
There were other aspects related to the quality of the data being used that I will address later in this guide.

Research summary

Research over the past 22 years has shown that work is accomplished in social systems that are:

- Geographically dispersed
- Collaborative
- Cross organizational
- Self-organizing around a shared purpose

The research has also shown that group performance is optimized when decisions are based on data.

Arriving at a simple solution: the Accomplishment Model.

My studies of how value is created in social systems brought me to a simple solution. While organizations have developed management tools for improving productivity up and down the organization (or within silo's) we have yet to develop performance tools for improving productivity in self-organizing and collaborative social systems that are geographically dispersed and connect the company with vendors, customers and other strategic partners across and outside the organization chart.

The purpose of the Accomplishment Model[1] is to do just this. It is an integrated **planning**, **performance improvement** and **collaboration tool** for optimizing performance and well being.
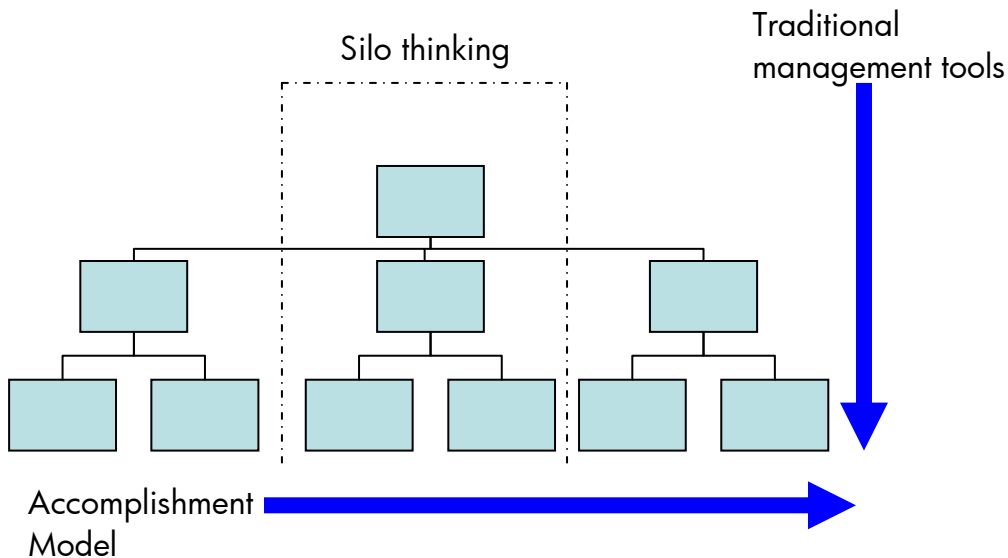
As you go through this guide keep in mind that a great example of performance improvement in social systems is the typical sporting event. On the field teams self-organize to win, they are collaborative with horizontal connections and they base their actions on data.

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[1] The Accomplishment Model was developed by Dennis Sandow over ten years of research with and at the University of Oregon.

Section 2 Organization of this Guide to the Accomplishment Model

The following sections in this Guide to Using the Accomplishment Model are organized in a manner to expand your understanding of how performance is improved in social systems.

You'll find that they are organized in the following manner:

<u>What</u>- explains what is to be done in developing the Accomplishment Model.

<u>Why</u>- explains why this process is more effective than traditional methods.

<u>How</u>- spells out exactly how to perform the particular step being described.

<u>Example</u>- illustrates my first application of the Accomplishment Model in managing a start up business aimed at employing people with developmental disabilities.

Section 3 Defining a shared purpose

"A system is a network of interdependent components that work together to try to accomplish the aim of the system. A system must have an aim." Dr WE Deming [6]

What to do in defining a shared purpose?

In the Introduction, I explained that employees do not organize themselves based on the formal organizational chart as much as they organize themselves around _a shared purpose._

To determine the shared purpose in a social network we arrange 30-60 minute interviews with top executives or stakeholders such as customers or strategic partners and ask them two simple questions- _" What has been accomplished over the past 6 months?" and "What must be accomplished in behalf of the business going forward?"._ We listen carefully to them. We do not interrupt them nor interpret what they are saying. Instead we take copious notes and try our best to write down exactly what they are saying. We do this with several executives who represent positions of authority in the organization or are critical stakerholders outside the organization such as customers, vendors, etc. Once we are done we read and re-read all of the interviews and identify common themes. Once we have done so we craft a purpose statement from their themes. With the shared purpose now defined we return it to the executives with the question, _"Is this what must be accomplished in behalf of the business?"_

Why define a shared purpose in this way?

In more stable and predictable times it was sufficient for executives to have several consecutive meetings to construct an annual plan. Today times have become less stable and more unpredictable. To address these new times, executives must be able to quickly address new challenges and opportunities. There is a new leadership imperative to direct the organization through an aligning shared purpose.

The most efficient process for executives to define a shared purpose is not to gather them together in one place at one time. With executive travel and competing demands for their time this is not as efficient as conducting interviews. Further, the interview strategy proposed in the Accomplishment Model is taken from the social sciences and is a scientific process for defining shared meaning. This makes it a superior process to holding long meetings for consensus building and has proven to create a shared purpose that mobilizes the workforce in a much shorter time frame.

How is shared purpose created?

Without a doubt shared purpose arises when groups of people experience a sudden disruption in their planned routines. Coming upon the scene of a automobile accident is an excellent example. Without a word being exchanged people move into a fluid coordination of action, stopping traffic, aiding the passengers involved in the accident, calling for help, etc. This is true in any organization. When something emerges that requires the spontaneous attention and action of a group they will organize themselves around a shared purpose. This is perhaps the most efficient form of human organization. That being said, shared purpose can also be derived by applying social science practices such as open ended interviews with executives, shareholders or other stakeholders.

Step 1 Listening and understanding using qualitative research practices.

A shared purpose can be defined by using qualitative research practices from the social sciences. In this case, one half hour- one hour interviews are scheduled with critical stakeholders (customers, vendors, etc) and executives in the business. The process begins with open ended interviews. Open ended interviews are interviews with vague questions. The reason for this is that when we structure interviews with several questions we actually compromise our learning. Our questions may not get to the knowledge resident in the social system. This is a subtle but important point. When we formulate a series of questions we are acting as if we already know what the purpose of the organization is.

Performance improves when people are recognized for their contributions. So our interviews aimed at determining purpose begin with the first of two questions, *"What has been accomplished over the past six months?"* As interviewers our responsibility is to take rigorous and impeccable notes as the interviewee answers this question. Many times an interviewee will ask for more structure, *"What would you like me to talk about?"*, or, *"Can you be more specific?"* We answer these questions by explaining our process rigor and assuring them that whatever they wish to share will be valuable. It becomes obvious when the interviewee has nothing else to share with us concerning past accomplishments of the group. This is when we turn to our second of two questions, *"What needs to be accomplished in behalf of the business going forward?"* Once again we take copious notes on what we are being told. We finish our first interview by asking who else we should interview and continue our interviews until no new critical stakeholders are identified.

Step 2 Validation of interview data

The second step in the interview process is to validate the interview notes with each interviewee. Social validity is the key quality indicator in determining a shared purpose. This is a simple but sometimes revealing process. The interview notes are simply sent to the interviewee who is invited to accept the notes or edit them. To expedite this process we tell the interviewee, *"Thank you for your time and sharing your knowledge. Here are my interview notes from our conversation. Please feel free to add to my notes or edit them. If I do not hear from you within a week I will assume that my notes are accurate and valid."* Validating interview notes is the key to assuring the quality of the data.

Step 3 Identifying common themes.

At this point the process has generated a number of interviews which have been transcribed and validated with respect to the question *"What needs to be accomplished in behalf of the business going forward?"* The next step is to identify common themes from the interviews. Common themes are re-occurring comments made by two or more of the interviewees. Now these comments do not need to be word for word to be classified as common but should represent a shared sentiment. To identify common themes, begin by reading your interview notes. Are there any common explanations, comments, emotions or thoughts? Group these together and give a title to the themes you identify. This process is called *triangulation* and it accelerates our understanding of groups and their trust in us. You can rely upon the common themes to be valid explanations what has been accomplished in the past and what needs to be accomplished going forward. You may also notice that work becomes more effortless when using this practice. This is because you are respecting the group's experiences and acting on their generous sharing of knowledge. The process of triangulation generates an understanding of the common to a group.

Here is an example of common themes around a past accomplishment that are shadowed. In this case the employees reflected on the team dynamics that created value in a solution they created.

Kay- *"We had a good project manager and motivated team that met regularly. Our agenda was clear and we had good coordination within the team. "*

Steve- *"There were lots of complications and issues to work through but the team's can do attitude made us successful in the end."*

Maria- "*In general the ==team was very good. They were open with one another and communicated well==. From a team perspective we covered a lot of things we needed to.*"

Yan- "*There were a lot of challenges in the project. ==They were overcome because the core team had developed trust== which is hard to do ==without face to face meetings==.*"

Dave- "*==Everybody on the team was awesome.==*"

Kip- "*We were all remote. There are some team ==members I have not met face to face. The team was committed, motivated and creative==. We could laugh, cry and celebrate remotely. ==Our project manager was critical in keeping us together==.*"

The theme that emerges in studying these example interview notes is *team dynamics that contribute to execution of value creation enabled by project management when people can not meet face to face.* This theme can then be translated into a shared purpose such as "*Create the conditions for improving performance and well being through project management when people can not meet face to face.*"

Step 4 Validating common themes concerning what needs to be accomplished in behalf of the business going forward.

Once the common themes have been identified we send them to the interviewees for final validation. In line with our previous communication with interviewees we write the interviewees, "*I have studied my interview notes for all those I interviewed. In doing so I have identified these common themes that represent what must be accomplished in behalf of the business going forward. Please tell me if I have overlooked anything you think is critical. If have not heard back from you within a week I will assume that these themes are valid*".

Early experimentation in using the Accomplishment Model suggests that this process (steps 1-4) accelerates planning in organizations. This is because we are using a scientific process to understand what needs to be accomplished in behalf of the business as opposed to bring executives together and having them craft a mission statement. This process improves the quality of understanding an organizations' purpose and decreases the amount of time executives need to spend to develop a purpose statement. This process represents a process improvement in understanding the purpose of an organization and generating execution to achieve the purpose.

Steps to create a shared purpose

1. Identify critical stakeholders invested in improving the performance of the business.
2. Send out a note of greeting and express your desire to learn from them about what needs to be accomplished in behalf of the business.
3. Schedule ½ hour interviews again stating the purpose of the interview and the nature of the interview being open ended so there is no need to prepare.
4. Conduct ½ hour open ended interviews.
5. Transcribe interview notes.
6. Send interview notes to interviewee for validation.
7. Continue steps 1-6 until there are no new patterns or themes emerging from the interviews.
8. Create a purpose statement from the constructed themes and send it to interviewees for validation and approval.

Example of the creation of shared purpose

In the mid-1970's parents, friends and professionals concerned with the quality of care for people with severe developmental disabilities were successful in passing federal legislation that articulated their Bill of Rights. Institutionalization was the primary means of service then and often found to provide sub-human care.

By the late 1970's parents, church groups, professionals and general citizens began to argue for community based care to replace institutionalization. In Bend, Oregon a group formed to lobby for community services. Of course, people needed a place to live and the Residential Assistance Program was created to provide residential care. At the same time a not for profit business called Dynatron was formed to offer employment services. Board members traveled to the University of Oregon to study new breakthroughs in training sophisticated electronic assembly skills to people with severe developmental disabilities. In consultation with the University, program administrators in Deschutes County and others we created a simple but articulate purpose:

> **Employ people with disabilities**

Section 4 Constructing an Accomplishment Tree

What to do in constructing an Accomplishment Tree?

We begin with our purpose and ask, *"What do we need to accomplish to achieve our purpose?"* This results in a list of *strategies.* Then we repeat the process for each strategy asking *"What do we need to accomplish to achieve this strategy?"* This results in a list of *tactics.*

Why construct an Accomplishment Tree?

Perhaps the greatest leverage in the Accomplishment Model is shifting the performance frame of reference from *behavior* (what shall we do) to *performance* (what shall we accomplish). This may seem trivial but it is not. First of all, it is important to shift our focus from behavior to accomplishment. If we meet to plan our future behavior we immediately find that our conversations are difficult with disagreements, lengthy arguments and everyone lobbying for their own interests. There is a simple explanation for this and it has little or nothing to do with those involved and their desires to plan for a healthy future. Behavior can not be planned; it's constantly changing as employees strive to improve their performance. The accomplishment tree is derived from operations research. It is a very effective decision support tool because it graphically shows all of the strategies and tactics required to meet a shared purpose. When the accomplishment tree is complete it shows the entire performance system on a single page!

How is an Accomplishment Tree constructed?

Step 1 Shifting our conversations from behavior to performance.

By using the accomplishment model, we transform the planning and performance improvement process by shifting our conversation from **behavior** ("*What will we do?)* to **performance** *"What will we accomplish together?"* Here are a few distinctions between behavior and performance:

Behavior	*Accomplishment*
Take the bus	Arrive at work
Cook a meal	Serve dinner
Plant tomatoes	Harvest tomatoes

This represents a cultural shift in organizations – a change in the pattern of relationships. The new pattern is clear. We can see that taking the bus, cooking a meal and planting tomatoes are the "means to the end" of arriving at work,

serving dinner and harvesting tomatoes. This subtle shift is powerful because we create an environment where people are **free** to behave as they need to in order to accomplish something of value. This freedom to behave is fundamental to improving performance by enabling self-organization.

The best way to create this cultural shift is to sponsor a half day planning meeting. Start the meeting by having a customer or senior leader reflect on what has been accomplished in behalf of the business by the participants in the meeting. These testimonials not only create a positive environment for planning but also remind the participants of the importance of conserving valued accomplishments as part of their plan. Beginning with a celebration of past accomplishments creates confidence and a "first place" group psychology.

Step 2 Constructing the accomplishment tree.

Now that the shared purpose has been defined we facilitate a conversation concerning, *"What must we accomplish to achieve our purpose?"* This is a simple conversation as sub-accomplishments or *strategies* to achieve the shared purpose are created. The key to facilitating the construction of the accomplishment tree is to frequently ask participants, *"If we achieve these strategies will we accomplish our purpose?"* The quality criteria for constructing the accomplishment tree is 1) simplicity through the avoidance of complicated language and elimination of redundancies and 2) the creation of a decision tree structure with clear strategies and tactics.

Once strategies have been identified repeat this same process to identify the tactics or next sub-level as well. Creating the accomplishment model is complete when the entire performance system is mapped on one page. Notice that tasks have not been identified. This is because future tasks can not be planned. Tasks are developed through the daily coordination of action within social systems. They are best generated on 24 hour learning cycles. The accomplishment tree creates an alignment between the shared purpose and continuous improvement. This is the accomplishment models architecture to effectively coordinate action in a social system as it aligns standards and continuous improvement through innovation.

Purpose   *Strategies*   *Tactics*   *Tasks*

Standardize ←—————————————————————→ **Innovate**
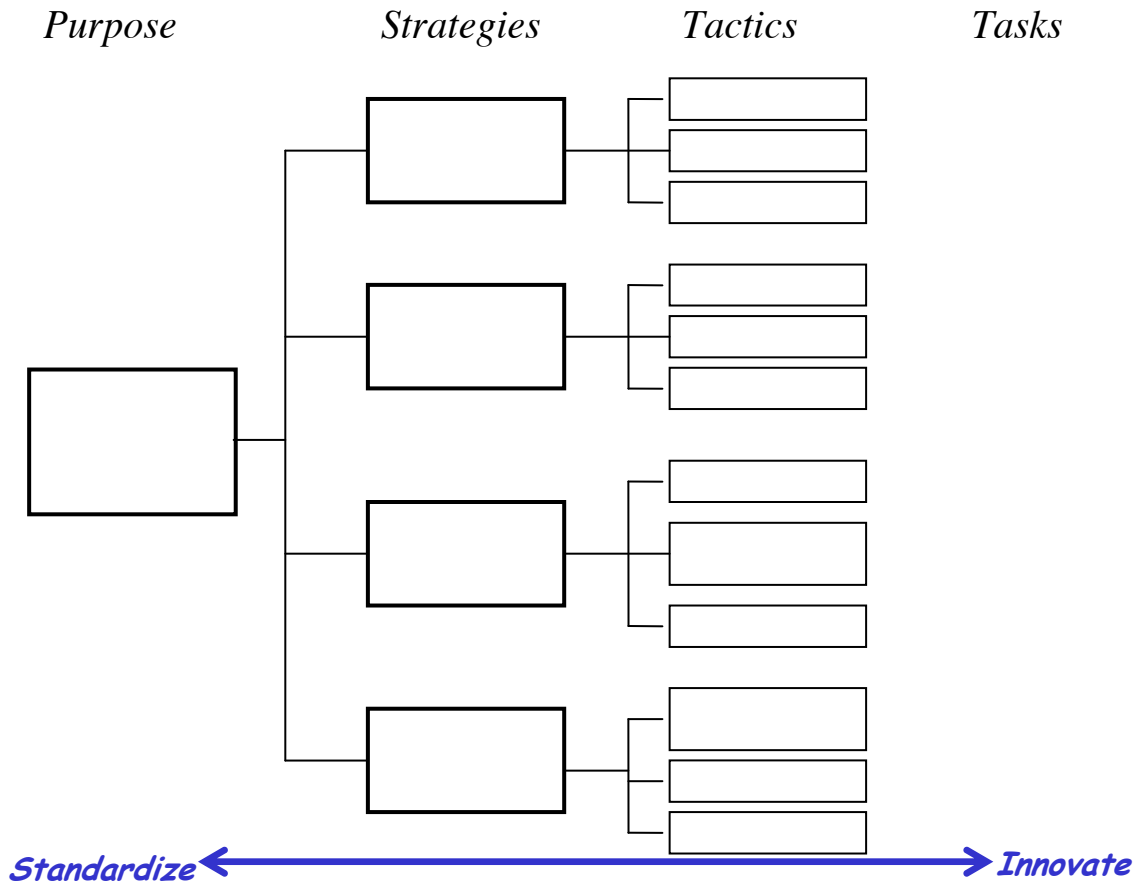
Sample agenda for constructing an accomplishment tree.

Morning Session	
Introduction and context setting	Senior leader
Recognition of our accomplishments	Senior leader or customer
Present the shared purpose	Facilitator

Lunch	
Desired accomplishments–Planning Session	Facilitator/All
Consolidation of strategies, tactics and metrics	Facilitator/All
Going Forward • Review next steps • Closing comments • Meeting Debrief	Senior leader

Steps for constructing an Accomplishment Tree
1. Shift planning conversations from behavior (What shall we do?) to performance (What shall we accomplish?).
2. Identify strategies by asking "What must we accomplish to achieve our purpose?)
3. Identify tactics by asking "What must we accomplish to achieve our strategy?" for each strategy.
4. Check the accomplishment tree by asking, "If we accomplish these strategies will we achieve our purpose?" and "If we accomplish these tactics will we achieve our strategies?
5. The accomplishment tree is complete when the entire performance system is graphically depicted on one page.

Example of creating an Accomplishment Tree

Executives from Dynatron and other small business collaborators around the country identified four things they would have to accomplish to achieve their shared purpose- 1. get work, 2. keep work, 3. train the workforce, and, 4. support social integration of employees back into their community.
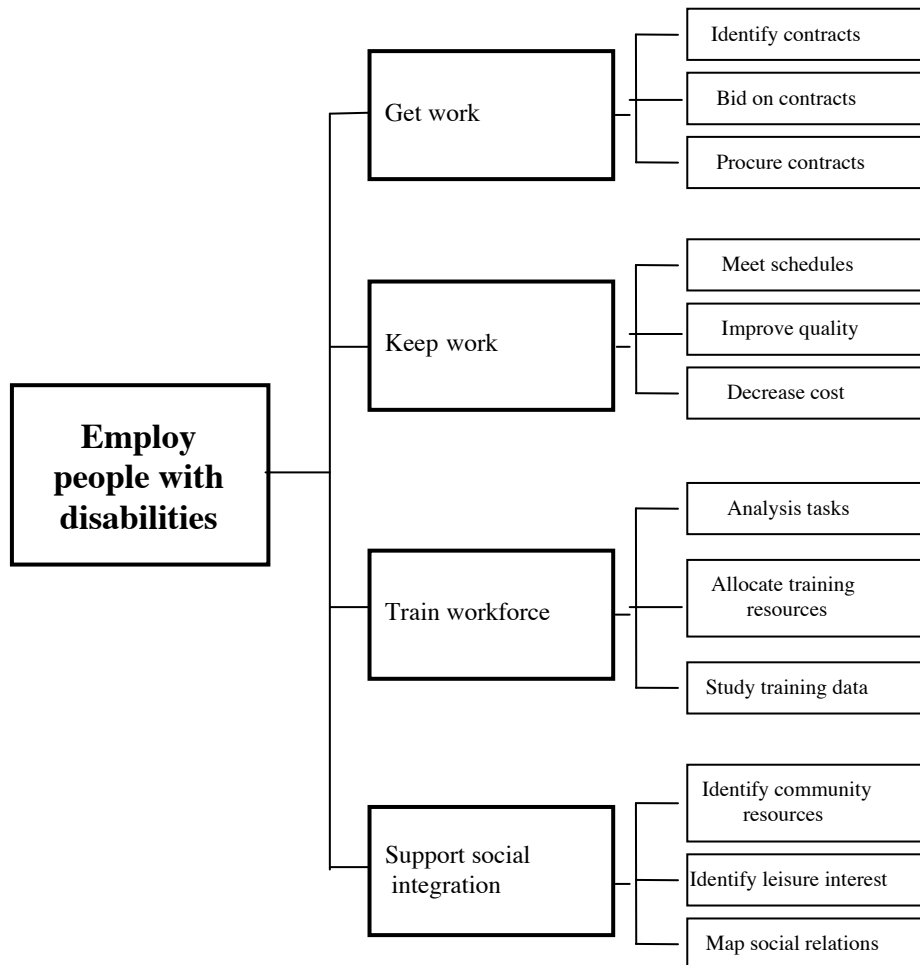
Section 5 Creating performance measures

"We are inundated with information and starving for insight."

What to do creating performance measures?

For the purpose statement and each of the strategies and tactics performance measures are defined.

Why create performance measures?

Data based decision making improves performance. Data based decisions versus decisions made by judgment improves productivity, reduces costs, improves work satisfaction and results in healthy social systems.

How are performance measures created?

Step 1 Measuring performance by creating actionable data.

Beginning with the purpose statement we ask, *"How will we know when we have achieved our purpose?"* The same process is applied to each one of the strategies and tactics. This results in a measure for every level of the accomplishment tree.

The Accomplishment Model is based on a very rigorous definition of data. Data is language – the coordination of action [8]. Data must meet the following conditions if it us to improve performance:

1) Data must be **actionable** and lead to the coordination of action. In order to be effective, data must lead to coordinated action. If it does not it is at best distracting and at worse misleading. If data is not actionable it should be restated.
2) Data must be **relevant**. Data that is actionable but irrelevant will not lead to performance improvement. For example, timing how long a baseball batter is at the plate is actionable (we can rush the batter) but is irrelevant because there is no time limitations to batting.
3) Data must be **timely**. Data that is available monthly is better than data that is available quarterly. Data that is available weekly is better than data that is available monthly. Performance is optimized when data is used in daily team conversations. There is a direct relationship between the timeliness of data and productivity of a team.
4) Data must be **accessible**. Data that is horded by a person or group is of no value at all. Unfortunately, data is sometimes "hidden" because we are afraid of sharing a mistake of poor performance. This actually makes things worse as it takes longer to become aware of the mistake. Data should be

publicly posted for all to see and all to respond to in terms of making a contribution. It can be posted on websites, shared through email or the internet. Publicly posted data improves productivity and expands the social network of contributors.

Do not be discouraged if the first data measures you define do not meet the four conditions required by the Accomplishment Model. Learn from them and revise the data as needed until the four conditions are met.

Step 2 Use the Accomplishment Tree as a troubleshooting tree to coordinate action and tasks.

The Accomplishment Model becomes a trouble shooting tree, functioning in a "pareto" like fashion. Adopted from the science of performance improvement, the pareto principle claims that 80 percent of a groups valued accomplishments will be generated from 20 percent of the group's tasks or coordination of action.

Having the entire performance system or accomplishment tree on a single piece of paper can appear to be intimidating. *"How on earth can we get all of this done!"* is a typical comment. This is where the pareto principle comes to play. The accomplishment tree becomes a decision tree as employees review data at the strategic and tactic level to determine where they should focus their collective efforts. This creates leverage in the organization and informs performance improvement meetings.
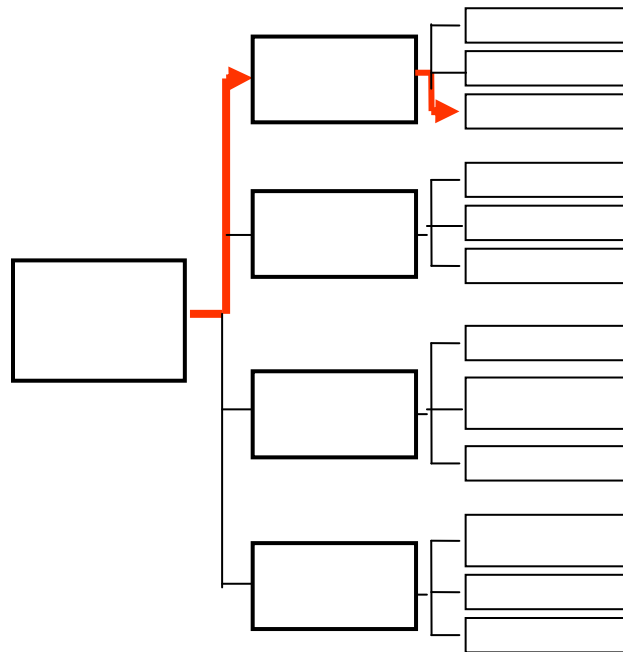
Update the measures on the accomplishment tree making sure the data is timely and relevant. Using the data, decide what tactics require the group's attention.
Use this process in team or staff meetings.

Step 3 Using the Accomplishment Model in the coordination of tasks.

As a living system the tree is a good metaphor for the Accomplishment Model. The strength of the roots, trunk and branches depend upon the leaves of the tree. In the case of the Accomplishment Model, daily tasks represent the leaves of the tree. The essence of the Dr Deming's quality improvement cycle is based on data based decision making and without data based decisions that help us coordinate our tasks the accomplishment model is ineffective.

Improvement in performance and productivity occurs with each rotation through the quality improvement cycle. Data based decision making occurs between the Study and Act phases of the cycle. As we turn from planning to performance using the Accomplishment Model we rotate the quality improvement cycle so we begin with the Study phase. The cycle time of the Accomplishment Model will vary depending on whether we are studying purpose, strategies, tactics or tasks:
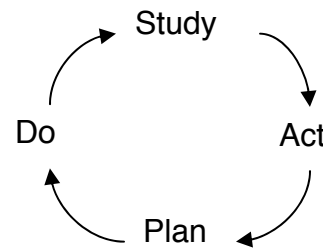
	Purpose	Strategies	Tactics	Tasks
Accomplishment Model cycle time	Annually	Quarterly	Monthly	Daily

Performance is optimized in daily meetings that "study" the previous day's performance and uses the pareto principle to improve upon execution or coordinated action. The Accomplishment Model uses strategies and tactics to create a daily staff meeting format. In the meeting room (physical or virtual) data is posted in order to track performance. Staff meeting agenda and minutes use strategies and tactics to structure the conversation. Facilitation of the meeting rotates and is shared by everyone on the team. Those present are listed along with the meeting date. Referencing the performance data, the group decides on those actions most likely to improve performance and list them as tasks to be performed. The person(s) responsible for the task and the intended completion date are recorded to complete the staff meeting minutes.

The frequency of the coordination of tasks through this meeting format is also the rate of the learning cycle. The absence of numerical data should not result in postponing meetings. A conversation about what was accomplished will create

recognition and well being in the group and expand performance. The conversation concerning what has been accomplished will also naturally be followed by discussing what needs to be accomplished and the staff meeting minutes will capture those tasks that improve performance.

Management is responsible for making sure that there is are scheduled performance improvement meetings on a fixed frequency. Best practices suggest that daily meetings are most productive.

During staff or team meetings review the performance data and celebrate performance by publicly recognize those who contributed to performance. Planning for the next day use the accomplishment tree as a decision tree and identify which tactics will generate the greatest value for the organization. Identify tasks aimed at improving performance, those responsible for completing the tasks and due date for completion. Finally publicly post minutes from the performance improvement meeting.

Steps for creating performance measures.

1. Measure performance by creating actionable data. For the purpose, each strategy and each tactic create measures which are timely, relevant, actionable and accessible and begin collecting data.
2. When the Accomplishment Model is populated with data, use the accomplishment tree as a troubleshooting tree to determine where to priortize your efforts.
3. On a daily basis, use the Accomplishment Model to coordinate actions by creating an agenda based on the strategies and tactics necessary to achieve the purpose.

Example of creating performance measures.

Continuing with the example of Dynatron here is the revised Accomplishment Tree with the data measures included.
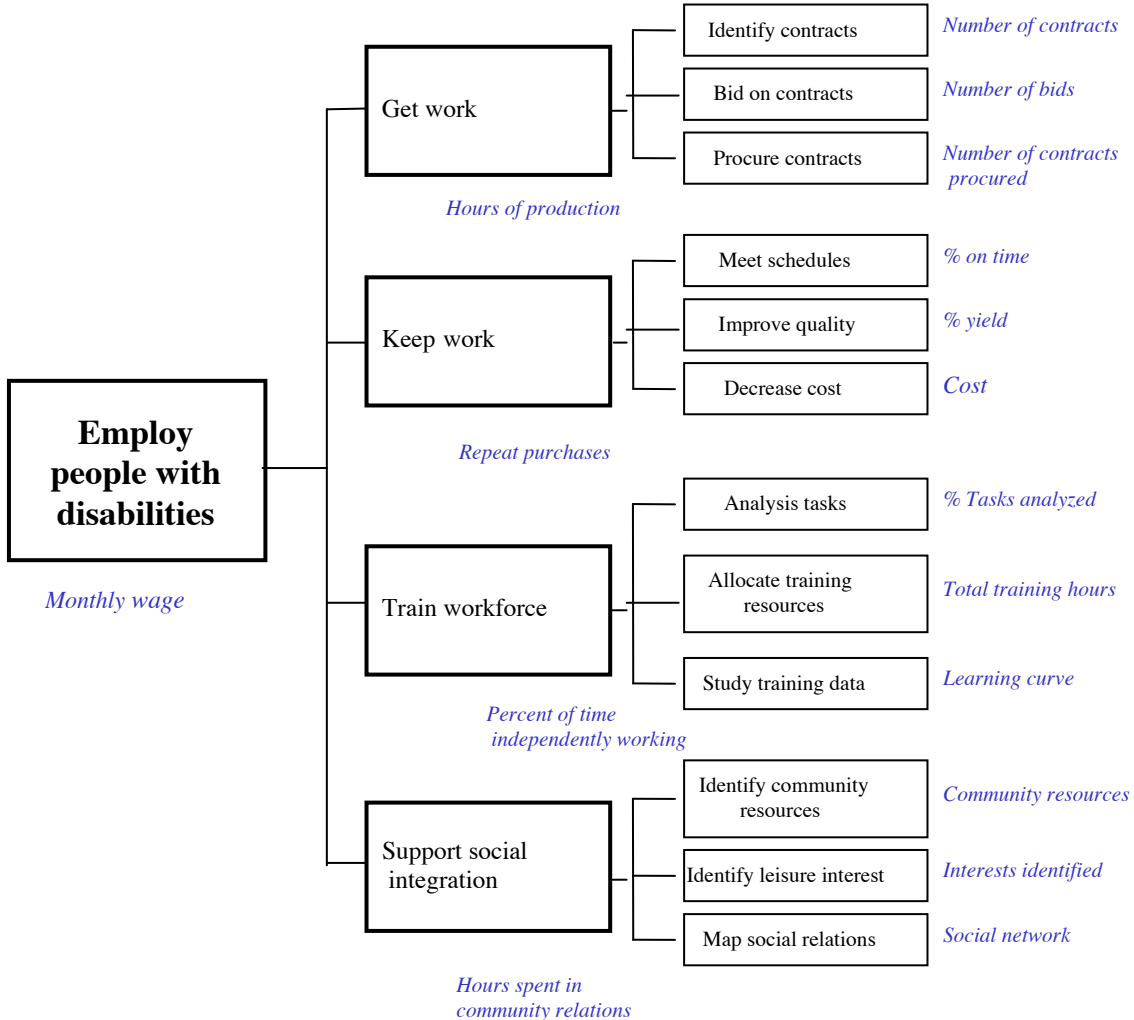
The data met the four conditions that have been described. 1) It led to coordinated action to improve performance both in product and services to people with disabilities. 2) It was relevant to our purpose. All irrelevant measures were eliminated such as IQ tests. 3) It was timely. All data was reviewed *at least* every day and much of the data was reviewed many times per day. 4) It was accessible. All data was posted within the business and shared with our customers (see the letters from HP and Representative Tom Throop at the end of this section and how they both reference data).

Once we studied what we had accomplished we would then use the Accomplishment Model to determine where we should invest our efforts at Dynatron staff meetings.
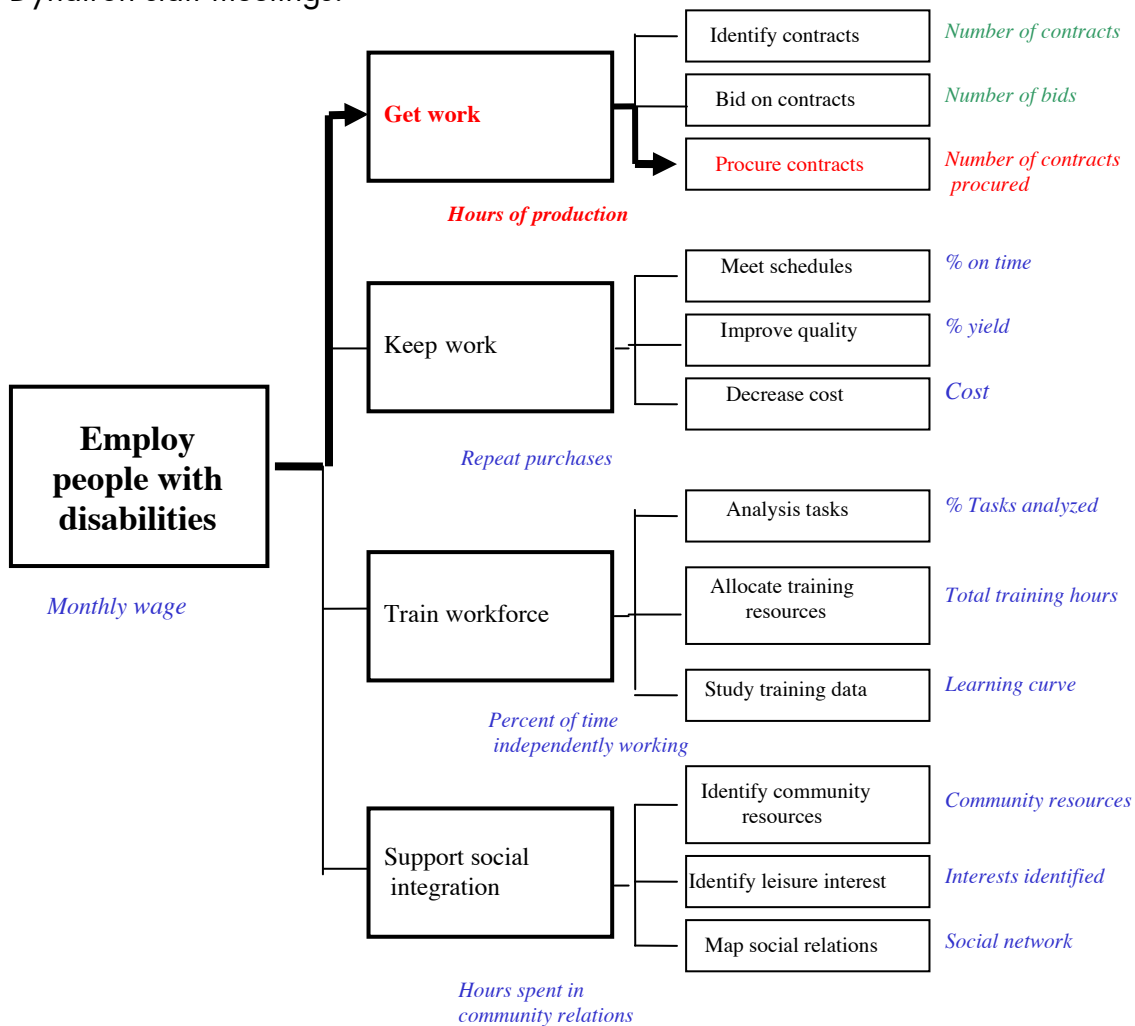
A quick glance of the Accomplishment Model's performance data shows that in order to achieve our purpose we need to increase the hours of production and to increase the hours of production we need to procure more contracts. This trouble shooting process becomes the foundation for coordinating action and tasks during performance improvement meetings.

At the end of each business day Dynatron staff would meet for one hour. Review of the performance data created well being as the staff recognized each other for their contribution. Recognition of performance also created well being and confidence because the staff became aware of their performance potential. After reviewing available data, employees would identify tasks to be done, who was responsible and when the task would be done.

Although we would like to think that performance improves in large spikes it seldom, if ever, does. Performance improves little by little and day by day through the coordinated action of employees using data to base their decisions.

The power of social systems lies in the alignment created by the Accomplishment Model. Particularly in times of need for accelerated action the more people in coordinated action the better.

Present:		Date:	
Tactics	Task	Who	When
Get work Identify contracts Bid on contracts Procure contracts **Keep work** Meet schedules Improve quality Decrease cost **Train workforce** Analysis tasks Allocate training resources Study training data **Support social integration** Identify community resources Identify leisure interest Map social relations			

The Accomplishment Model is an accountability tool and fosters collaborative conversations.

HEWLETT PACKARD

VANCOUVER DIVISION, WASHINGTON · 18110 S.E. 34th Street, Camas, Washington 98607, Telephone (206) 254-8110
Mail Address: Post Office Box C-006, Vancouver, Washington 98668-C006

October 14, 1982

Dennis Sandow and Joyce M. Albin
Specialized Training Program
1590 Willamette
Eugene, Oregon 97401

Dear Dennis & Joyce,

After the many months of exceptional service we have received from your organizations, it is about time that I commended you on your outstanding service. Over the last four months, which I have examined closely, your quality has been excellent, your deliveries have been almost perfectly on time, and your price maintenance and cost-cutting measures have helped us hold the line on inflation.

Specifically, the 02631-60065 RS 232 Cables has not evidenced a single reject during this entire period while we have used approximately 3600 units. Of the 02631-60603 Crashstops, out of a usage of about 5900 units, we have only experienced a reject rate of 0.3%. Of this amount it is not clear how much is our fault and how much is Dynatron's.

Also, your timely deliveries have kept us in continual production while maintaining only two weeks of inventory on our shelves. We take great pride in your accomplishments and hope to be able to progress in our relationship with you.

To this latter end I will be proposing a Kanban (just-in-time) approach for our future business. I look forward to working out the details of this approach during Dennis' visit tomorrow.

Sincerely,

Mitch.Thompson
Sub-Contract Buyer, VCD

M THROOP
DESCHUTES AND EASTERN KLAMATH COUNTIES
DISTRICT 54

PLY TO ADDRESS INDICATED:

HOUSE OF REPRESENTATIVES
SALEM, OREGON 97310

P.O. BOX 643
BEND, OREGON 97701

COMMITTEES
MEMBER:
ENVIRONMENT AND ENER
REVENUE

HOUSE OF REPRESENTATIVES
SALEM, OREGON
97310

Dear Colleague,

I recently had the opportunity to visit the Specialized Training Program in Eugene, and its affiliate, Creative Opportunities, in Bend. Both are work activity centers for moderately, severely, and profoundly handicapped adults with I.Q.s from below 10 to 35.

The programs are quite impressive, and if you are near 1590 Williamette in Eugene, or 2055 N.E. 1st in Bend, I would encourage you to visit.

These two work activity centers deinstitutionalize, prevent institutionalization, and reduce the need for public assistance for their clients by teaching sophisticated technical assemblies and allowing workers to earn a non-trivial income.

Cost analyses comparing this program to the typical service model of institutionalization and/or "welfare" support should be available within a year. Initial figures look promising. In 1978-79, Creative Opportunities in Bend spent $23,672 in state Mental Health dollars and generated $7,621, or 24% of its total budget in production revenues. To date for 1979-80, state Mental Health dollars amount to $20,736, and the program, by January, had already generated $10,727, or 34% of its total budget in production revenue.

From its inception, Creative Opportunities has paid $9,173 in wages to twelve handicapped adults, allowing these clients to become more self-reliant, financially and socially. In December, 562 aggregate hours were worked, while $983 were earned in wages. The average hourly rate was $1.75 per hour, $1.17 _more_ than the average hourly earnings of _mildly_ handicapped adults according to a 1978 Department of Labor study.

Private enterprise has been especially cooperative. Component parts assembly for dialysis machines, occiloscopes, radar guns, chain saws, and Tektronix instruments is among the impressively productive activities for these severely handicapped adults whose I.Q.s range from below 10 to 35, as I said above.

These two programs are very impressive, from both human and financial perspectives. I am hopeful you will become acquainted with another Oregon effort to serve the less fortunate in a more responsible and less costly fashion.

Thank you for your time.

Sincerely,

Tom

REPRESENTATIVE TOM THROOP
District 54

cc: The Honorable Victor Atiyeh
    Mr. Leo Hegstrom

Before Dynatron had changed its name from Creative Opportunities

Section Six: Social collaboration and exemplary performance

"We have grown up in a climate of competition between people, teams, departments, divisions, pupils, schools, universities. We have been taught...that competition...will solve our problems. Actually, competition, we see now, is destructive. What we need is cooperation and transformation to a new style of management in which everyone works together as a system, with the aim for everybody to win." - Dr WE Deming [9]

"Today, in our "market-oriented" cultures, we continually hear that competition is the natural way for humans, just as, it is claimed, it is in nature. This, we are told, is "survival of the fittest, the strongest", and it will ultimately yield "progress".

Yet, strangely … when we observe our reaction to people in misfortune or disaster (where a "competitive" advantage immediately presents itself), we generally find ourselves feeling sympathy, caring and nurturance … when we are in work, we find we are most satisfied and productive when we cooperate with our fellow workers … when our closest pets experience us in sadness or bereavement, there is something about their presence that we humans might call empathy for our condition.

So, in these observations in daily life, I claim that we do not see "competition" operating; we see love, mutual respect, caring. If a coherent explanation of humanness could show that human beings are biologically *loving (cooperative) beings, and that "competition" and "hierarchy" and "control" are cultural impositions which negate our humanness, how would our awareness be changed, and how might our behaviours come to differ?"* - Dr Humberto Maturana [10]

What to do to create collaboration and exemplary performance?

Have you ever noticed a coach once a play is in motion on a baseball, football or soccer field? To begin with, they do not interrupt the players while they are in motion. They know that this would destroy the play. Instead the players have the freedom to do what they think is best. So the coach studies the play, walking around the side lines to see it from different angles. When the plays are successful, the coach congratulates the players and when it is not he/she shares thoughts about improvement. Finally, the coach <u>always</u> references the relevant data be it the score, time remaining or other statistics. Well this role is as relevant in management as it is in sports. To create collaboration, managers should give employees the freedom to organize themselves as they best see fit. The manager is also responsible for making sure that data is being used to study performance. Finally, they should study performance by walking and talking with employees. In management literature this is known as management by walking around.

Why create an environment of collaboration and exemplary performance?

In today's global enterprise it is no longer sufficient or effective to contain exemplary performance to one region of the world. Doing so reduces productivity and increases costs while generating an ununiform customer experience which can destroy the company's brand and reputation. Besides, sharing the knowledge of exemplary performance is not expensive and it also generates well being amongst employees. It simply asks that employees do what they do naturally- take time to collaborate.

How is an environment of collaboration and exemplary performance created?

Step 1 Using the Accomplishment Model to identify exemplary performance.

At the beginning of this training guide we set the context for the Accomplishment Model. Innovation and creativity are a source of value in the global economy and knowledge is the source for value creation. Knowledge is social in nature and is optimized in globally dispersed and self-organizing social systems. These social systems are not "bound" by companies but connect companies, vendors, universities, thought leaders and other strategic partners in a process of continuous collaboration.

Using the Accomplishment Models data infrastructure exemplary performance can be identified for the purpose and at the strategy level. With the discovery of exemplary performance comes the discovery of the exemplar network or those generating exemplary performance.

Step 2 Publicly recognize those responsible for exemplary performance.

When we study social systems we eventually reach the conclusion that we are studying ourselves. As members of social networks we come to realize that whatever we do to others is rooted in what we wish others would do to us. So everything that we do to a social system we do to ourself. Consider this the "do unto others" principle. When an exemplary group has been identified they should be acknowledged for the performance and complimented on their achievements. Timely and authentic recognition for making a contribution expands performance.

Step 3 Generate collaborative conversations.

Those groups generating exemplary performance will share their knowledge through collaborative conversations if encouraged to do so. To generate collaborative conversations ask them to teach others. Begin the conversation by listening to them explain how they improved performance. Try to avoid interrupting them as they offer their explanations. Use the open ended interview techniques described in Section Three. Collaborative conversations that begin with listening will result in knowledge being shared from the group that can be of tremendous use. Remember that social collaboration is innate in humans. We are born to collaborate. People will collaborate when given the freedom to do so. Collaboration begins with listening, which generates understanding. Understanding creates trust amongst people and this generates collaboration.
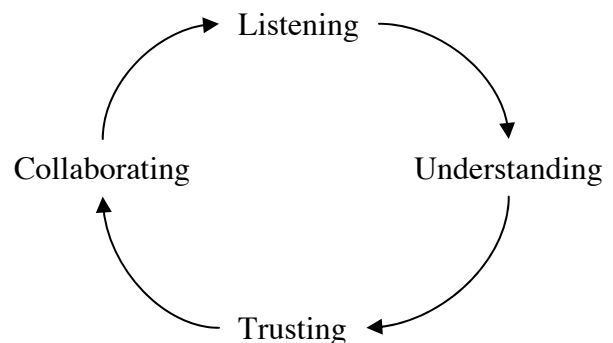
Step 4 The best of the best supports the rest!

The notion of recognizing exemplary performers is based on an understanding the importance of a collaborative culture. In competitive cultures exemplary performers will hoard their knowledge to maintain their superiority over others. The competitive culture demands this of them. In order to dominate, knowledge and best practices are not shared and we frequently experience behavior that is

ambitious and self-centered. This hoarding of valuable knowledge has a negative effect on social capital and the business.

In a collaborative culture the exemplary performers have a sense of responsibility for the whole system. If they see an opportunity to improve the performance of others by sharing knowledge they are quick to do so.

Steps in creating an environment of collaboration and exemplary performance.

1. Identify exemplary performance at the purpose level and for each strategy in the Accomplishment Tree.
2. Congratulate and publicly recognize the group for their contribution(s).
3. Schedule time to learn more about their performance.
4. Begin collaborative conversations by listening to them explain how they improved their performance.
5. Schedule technical assistance visits or conversations where the exemplary performers can assist others working on the same strategies.

Example of collaboration around exemplary performance.

Every year the small businesses employing people with disabilities would meet and determine what they wished to accomplish in the upcoming year. This generated an Accomplishment Model which reported monthly performance. Once a quarter, reports would summarize performance across the small business system.

Average monthly wages

Bend	Seattle	Eugene	Boston
$120	$145	$240	$70
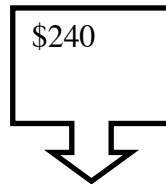
Exemplar!

The exemplar shared their knowledge with the other sites expanding system wide performance. Now Eugene's performance was measured by both its average monthly wage **and** helping to increase the average wages in Bend, Seattle and Boise. The Accomplishment Model helps in the flow of knowledge by creating a collaborative performance system. In so doing the notion of the "best site" was

eliminated because we found that exemplary status across our strategies involves all of the sites.

	Bend	Seattle	Eugene	Boston
Hours of production	1200	1500	***2300***	600
Repeat purchases	***36 Mos***	18 Mos	27 Mos	6 Mos
Percent of time independently working	83%	***86%***	77%	32%
Hours spent in community relations	220	190	210	***460***

The Accomplishment Model data was used to coordinate action across the entire performance system. Eugene shared knowledge of how to increase hours of production. Bend shared knowledge of how to increase the number of repeat purchases. Seattle shared knowledge of increasing the percentage of time independently working and Boston shared knowledge of increasing the number of hours spent in community relations. The knowledge producing network becomes a collaborative knowledge sharing network.
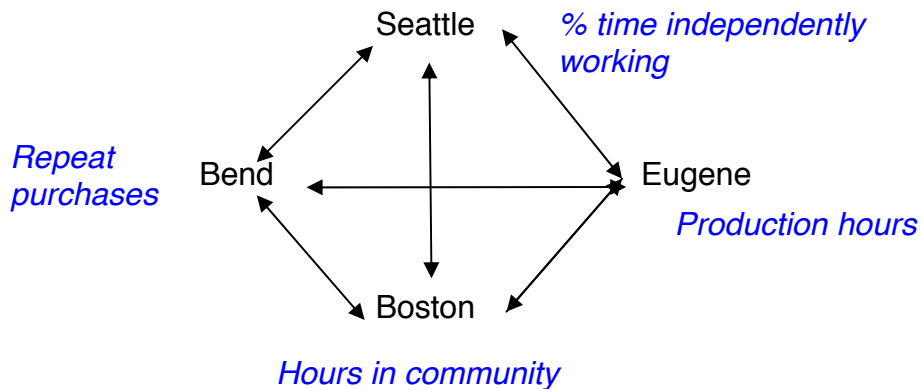
Appendix 1 Productivity

Economists have discussed how human capital or individual productivity and social capital or group productivity is dynamic and can be augmented. The Accomplishment Model has been designed and proven to improve group productivity by:
1. supporting performance in collaborative social networks,
2. creating a shared purpose,
3. using data and a decision tree to make performance decisions and
4. enabling the identification of the exemplary performer to improve the performance of the entire system.

There are measures of **_time_** that can be used to improve productivity.

Frequency – the number of occurences of a process over time. Example- how frequently staff use data to make decisions in their staff meetings.

Duration – the length of time between when a task is initiated to when it is completed. Example- the length of time it takes to create an accomplishment model.

Latency - the length of time between the initiation of a task and the beginning of the task. Example- management approved of a project using the Accomplishment Model and the project began 90 days later.

Use frequency to measure how often you complete the Study->Do->Plan->Act cycle.

Use duration to measure how long it takes to complete the Accomplishment Model and generate data that meets the four critical conditions.

Use latency to measure how long it takes to begin performance planning using the Accomplishment Model once the project has been approved.

Appendix II An Accomplishment Model for creating an Accomplishment Model

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                                    ┌─────────────────────┐
                                    │ Construct           │
                            ┌──────▶│ Accomplishment      │
                            │       │ Tree                │
                            │       └─────────────────────┘
                            │
                            │       ┌─────────────────────┐
                            │       │                     │
                            ├──────▶│ Establish metrics   │
                            │       │                     │
                            │       └─────────────────────┘
                            │
                            │       ┌─────────────────────┐
                            │       │                     │
                            ├──────▶│ Collect data        │
                            │       │                     │
┌──────────────────┐        │       └─────────────────────┘
│ Improve group    │        │       ┌─────────────────────┐
│ performance      │────────┤       │                     │
│                  │        ├──────▶│ Publicly post data  │
└──────────────────┘        │       │                     │
                            │       └─────────────────────┘
                            │       ┌─────────────────────┐
                            │       │                     │
                            ├──────▶│ Review data         │
                            │       │                     │
                            │       └─────────────────────┘
                            │       ┌─────────────────────┐
                            │       │ Organize            │
                            └──────▶│ performance tasks   │
                                    │                     │
                                    └─────────────────────┘
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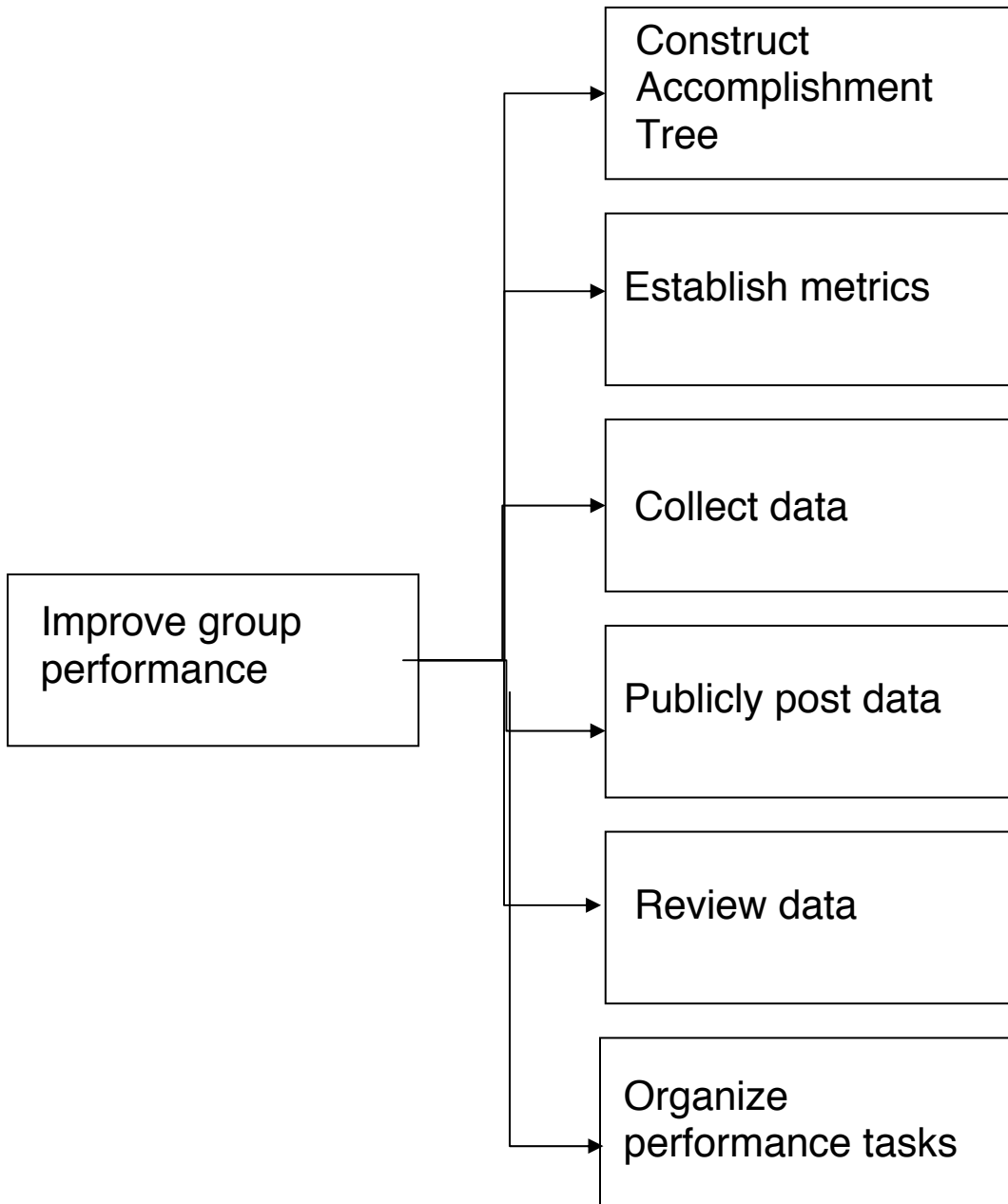
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