THE SYNERGY OF TEACHER LEADERS: IDENTIFYING THE CHARACTERISTICS OF
A TEACHER LEADER COMMUNITY

A DISSERTATION SUBMITTED TO THE GRADUATE DIVISION OF THE UNIVERSITY
OF HAWAI‘I AT MĀNOA IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR
THE DEGREE OF

DOCTOR OF EDUCATION
IN
PROFESSIONAL EDUCATIONAL PRACTICE
AUGUST 2014

By
Erika K. Cravalho

Dissertation Committee:
Thanh Truc Nguyen, Chairperson
Louise Wolcott

Keywords: synergy, teacher leaders, team dynamics
DEDICATION

This is dedicated to…

Mikaila my joy,

Micah my blessing,

Keahi my support,

my parents my push,

my grandma my cultural piko.
ACKNOWLEDGEMENTS

So much time was used to get through this process, which included hours of class, research, collecting data, and writing. Through it all Keahi, Mikaila, Micah, and my parents have been supportive and without them this would have never been completed. This was done because of you, thank you for understanding me and my passion!

I am blessed to work with a group of teachers, Ka ‘Ike Loa, who inspire me each day. They remind me of the art of teaching and the joy in our practice. It has truly been an honor to tell their stories as they show me the possibilities of what people can do when working together in synergy. I am privileged!

People are placed in your life to assist you in moving on with your journey. Pua has been one of those people for me. Her nudges, sometimes pushes, have helped me to be a better educator, better mother, and better person. Thank you for the lessons and guidance, it has changed me. When there are two, three make for a more stable support and Kyle is that person. We are a killer triad and the changes we have made, the knowledge we have gained, and the lifelong friendships we have created can move… WALLS. Thank you for the laughs and sanity!

It has been one of those lucky opportunities for me to meet and work with Cynthia Kitagawa from Insight Consulting. She has been a coach and guide, reminding me of my part in the larger system. The hard conversations and her full support have helped me to be the leader I am today. The depth of her knowledge connected me with George Myers and Vicki Sween of the Effectiveness Institute and their Teams That Work framework. There is synergy in our work and our research and I appreciate you allowing me to dig deeper. Thank you all for your graciousness and generosity, I am humbled by your support in a way I cannot fully express.
Lastly to my grandma, who showed me what synergy looks like from a young age. She was in service to many, she exemplified excellence in all she did, and she never settled. I hope I make you proud!
ABSTRACT

Leaders exist at many different levels within a school system; headmasters, principals, school administrators, etc. Leadership within a school also includes teacher leader communities who are critical in school success. The purpose of this study was to examine the experiences that foster synergy within a group of instructional teacher leaders called Ka ‘Ike Loa. In this research, synergy is referred to as multiple characteristics of the group, that when combined, create a greater effect than the sum of their individual effects. For Ka ‘Ike Loa, the characteristics that contributed to synergy were the ability to put disparate pieces together through synthesis and combining these pieces into a new whole in order to meet the needs of the teachers with whom they worked. The participants within this study helped to further define synergy of teacher leaders.

I was part of Ka ‘Ike Loa and a practitioner researcher in this study. I combined qualitative research methods in ways that brought meaning to the phenomenon of synergy. An institution that understands working as a team is key, will unlock the creative power of the organization. The data analyzed were the words of participants collected through a series of open-ended interviews; two individual and one natural group interview as well as the Teams That Work assessment tool. The objective of this phenomenological case study was to identify the characteristics within Ka ‘Ike Loa that have enabled success and review the barriers encountered and how the group worked to overcome them.

Aligned to the two major research questions of the study, along with the literature reviewed, and the data collected and analyzed, were three threads of synergy. The threads identified to nurture synergy within a group are 1) environment fosters synergy, 2) people fosters
synergy, and 3) passion fosters synergy. The research indicates there is a need for synergy and attention to cultivating a culture of organizing to learn. Organizations that foster synergy through characteristics that were identified in the study can move groups from working groups to teams through deep social connection.
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CHAPTER 1
INTRODUCTION

Problem of Practice

Since 2007-08 Kamehameha Schools Kapālama Middle School (KSKMS) has transitioned from a predominately traditional school where the teachers are at the front of the room directing learning to a progressive, constructivist, learning environment which highlights students’ needs and interest in learning. All innovative change at KSKMS supports our triangulation of Hawaiian epistemology, 21st century skills, and middle school concept. Ka ‘Ike Loa emerged during school year 2009-10, which was a time of much change at KSKMS. Faculty now recognizes them as instructional teacher leaders who guide and facilitate curricular innovation on our campus. Ka ‘Ike Loa serves as a group whose dynamics encourage deep reflection and serve as a sounding board for curricular, instructional, and assessment change at KSKMS. They have worked to develop a culture committed to building the collective capacity of the entire KSKMS faculty. This slowly moved from their personal learning and capacity building to them cultivating an environment based on interdependence, shared responsibility, and mutual accountability for all faculty (Dufour & Marzano, 2011). My interest in studying this group and the work they do to develop themselves and their peers is an effort to study the outliers. As Shawn Achor (2011) posits, “If we study what is merely average, we will stay merely average. It is time for us to glean information from the outlier, looking for ways on moving the entire average up.” This study of Ka ‘Ike Loa is a story that gives the group context and meaning. This story is an attempt to tap into the human capacity for storytelling as it plays an important role in the human-centered approach to problem solving and design thinking (Brown, 2009). The focus
on problem solving and design thinking looks at ways to make improvements in the field of education and other fields in general.

Background

The onset of innovation came on the cusp of a new principal at the middle school in the 2007-08 school year. Through a process of appreciative inquiry, that included all faculty and staff, the new principal helped to identify the school’s vision as well as share her foundation in her personal vision of the school. This foundation was the triangulation of Hawaiian epistemology, 21st century skills, and middle school concept.

Epistemology is the study of knowledge and as Manu Meyers (1998) describes is a way of understanding native people. “Understanding what native people believe about their knowledge origins, priorities, context, and exchange teaches us more about its continuity” (Meyers, 1998, p. 22). I recognize Hawaiian epistemology as Manu Meyers (2004) defines it, “Endemic to a place, specific to genealogy, unique to the hopes of passed relatives, and alive within the practice of Hawaiians today” (p. 194). Through her research she identified five threads of effective ways of approaching ideas relevant to Hawaiian epistemology:

1. Role of place, history, and genealogy in knowledge exchange
2. Culture restores culture
3. Dualities of educational systems
4. Experience, practice, and repetition
5. The role of morality in knowledge acquisition (Meyers, 2004)

At KSKMS, we aspire to the full use of these approaches.
We also aspire in using our environment and curriculum to be gift-based, making learning spiritually satisfying and long-term (Burgess, 2013). Puanani Burgess (2013) discusses her belief of Hawaiian understanding, “That’s your naʻau, your gut, is the deepest place from which you think. It’s the place where your mind, heart, intuition, and experience come together. It is the place where mana, your spiritual core, lives” (p. 12). We strive to create experiences for students to develop themselves as learners and hone in on the skills they need to learn more about their passion.

The focus on 21st century skills in this ever-changing world we live in has been critical for us at KSKMS. We have spent much effort on being on the forefront of this in Hawai‘i. This focus goes beyond the use of technology and includes what the Partnership for 21st Century Skills (P21) (2014) identifies as, “The skills, knowledge, and expertise students must master to succeed in work and life” (para. 1). The focus is on students’ ability to think critically, solve problems, communicate with others, and collaborate with others (P21, 2014). All innovation and change at the middle school is done in a manner that promotes an environment that cultivates 21st century skills.

The transitional years of a middle school child are critical as a student prepares for high school and beyond. We see our responsibility at KSKMS as assisting students in understanding themselves, finding their voice, and being successful in their endeavors. The National Middle School Association (NMSA) (2010) affirms that middle school education must be,

1. Developmentally responsive: using the distinctive nature of young adolescents as the foundation upon which all decisions about school organizations, policies, curriculum, instruction, and assessment are made.
2. Challenging: ensuring that every student learns and every member of the learning community is held to high expectations.

3. Empowering: providing all students with the knowledge and skills they need to take responsibility for their lives, to address life’s challenges, to function successfully at all levels of society, and to be creators of knowledge.

4. Equitable: advocating for and ensuring every student’s rights to learn and providing appropriately challenging and relevant learning opportunities for every student (p. 13).

The programs and activities planned at KSKMS have these NMSA-identified affirmations at its core and close out the triangulation of our beliefs at KSKMS.

The triangulation of Hawaiian epistemology, 21st century skills, and middle school concept has been at the center of all we do at KSKMS since the 2007-08 school year. It continues to be the foundation of our program offering, our curriculum development, and basis for all innovation at KSKMS. It is who we are as Kamehameha Schools Kapālama Middle School.

The first year of the new principal in 2007-08, included much change for KSKMS and included the implementation of a one-to-one laptop program, a charette process in the designing of a new middle school facility, and tri-campus shifts into understanding and becoming a standards-based kula Hawai‘i (Hawaiian school). Her guidance and push for something different was the catalyst for the progressive learning environment we have at KSKMS today. The principal’s focus was on building the collective capacity of the faculty at KSKMS to promote learning within our existing organizational structures via a person improvement lens. Her belief was that the school is the people who are in it and spent much energy and time building the
personal capacity of KSKMS through the continuous improvement of both the faculties individual and collective professional practice (Dufour & Marzano, 2011).

With our new principal also came a strong vision, which ultimately moved our current reality to her overall vision and a great aspiration for what KSKMS could be (Senge, 1990). This creative tension as Senge (1990) describes is, “The juxtaposition of vision (what we want) and a clear picture of current reality (where we are relative to what we want)” (p. 132). This creative tension continues at KSKMS as different groups work to take action to fill the gap and move toward the vision of our school (Senge, 1990). Teachers are engaged in the energy needed to change the current reality to move toward the aspired state (Senge, 2012).

Disruptive innovation has been part of KSKMS since the arrival of our new principal. Christensen (2008) describes disruptive innovation, “Instead of sustaining the leading companies’ place in the original market, it disrupts that trajectory by offering a product of service that actually is not as good as that which companies are already selling” (p. 47). As the disruptive innovation progresses and is accepted as being good, it then takes over and supplants the old way of doing things (Christensen, 2008). Although this definition is connected to a business model I relate it to disruptive innovation at Kamehameha Schools as an organization due to the marketable shifts KSKMS made since 2007-08.

Although the planning year of our one-to-one laptop program was during the 2006-07 school year, the implementation year 2007-08, was the same year as our new principal. KSKMS was identified within Kamehameha Schools to first implement a one-to-one laptop program through an organization-wide evaluation. The core planning team of this project was a group of content area leads, who brought their curricular focus into decisions regarding the platform we would use as well as to what hardware and software would be included on the device. The core
planning team gathered feedback, researched what other schools were doing with technology, and discussed the direction we wanted to take this new innovation. The conscious choice was made to always keep the focus of our one-to-one laptop program a curricular one, keeping in mind the needs of our students as learners in the 21st century. The overall goal of our program has always been to offer every student with an expanded set of learning opportunities for both collaborative and self-directed learning. The school’s hope is every student is empowered by and engaged with the laptops and their curriculum to become constructors and designers of information and ideas (2013 KMS 1:1 Laptop Guidelines, 2013).

Our focus was not on the laptop as the curriculum or content, but as the tool and vehicle in which to engage students in their learning. Through the integrations of tools on their laptop, students are able to tailor their evidence of learning, motivating what they do in the classroom (Christenson & Horn, 2008). This was the beginning of disruptive innovations at KSKMS.

Also during the 2007-08 school year, the first year of our new principal, we were advised the Middle School would be going through master planning. This would include the complete rebuild of the Middle School campus. Teachers were asked to be a part of the process and we joined administrators through a series of charettes. These charettes were an opportunity for us to work with architects to share what we envisioned for teaching and learning in the future. This became an opportunity for us to design new architectural patterns to support new educational approaches. Through the charette process we believed that the physical space we were designing had the power to propel and transform teaching and learning at KSKMS (Bergsagel, 2007).

As we began this process, many of the teachers came to the charettes with ideas of what they saw happening at other middle schools in Hawai‘i. The idea of having each team in a pod that would spread around the campus was a popular preconceived idea. Within the first two days
of the charette, we moved from designing these traditional learning spaces that were clustered in pods, to developing progressive learning environments that opened up space and instructional possibilities. The architects showed us school, after school, sample, after sample, of how other learning spaces around the world were created and designed.

We ended the charettes during the 2007-08 school year with an open learning environment with minimal walls. The teacher leaders, who were chosen to be a part of the charette group, were also tasked with sharing the idea and architectural design with the larger faculty. This presentation was a sensitive one as this was not what most teachers envisioned our new facility to look like. However, we did it, and 2013-14 school year marked the second year of our new building, which includes open, classroom without walls learning environments. The transition to this new space was a statement that the same outdated school building was of the past. Through the design, we acknowledged the changes happening within school that require flexible and adaptable spaces that meet the needs of its learners. The design focused on creating student-focused learning spaces, which fostered collaboration within the space (Bergsagel, 2007).

The design of the new buildings at KSKMS created a setting where teachers are collaborating to improve their professional practice and are adapting these practices to meet the needs of individual student. As we broke down the walls, we broke down the barriers within KSKMS that caused isolation and anonymity typical of a traditional school experience in order to create a supportive environment focused on student success (Bergsagel, 2007). The building further supported the shifting culture at KSKMS through disruptive innovation.

In 2008-09, during the second year of our new principal, there was a big push within Kamehameha Schools to become a standards-based organization. This initiative caused a tri-
A Research and Development Team of tri-campus teachers and curriculum coordinators was put together to recommend a set of standards to our headmasters for tri-campus adoption. Through this process, Indiana standards were identified and chosen as the set of standards we would use at Kamehameha Schools. In the summer of 2009 a tri-campus professional development opportunity was provided. The focus of this professional development was to integrate Indiana standards into our daily practice. This *Making Standards Work* professional development opportunity was provided to all nine schools within the Kamehameha Schools system. At KSKMS this opportunity was made available to all teachers and from the invitation, six teachers along with our principal and curriculum coordinator at the time attended. This training was the foundation to a tri-campus goal which gave time and support to implementing the Leading and Learning model of *Making Standards Work* in the classroom. By virtue of participating in the professional development, the eight attendees were identified as Standards Early Adapters. I was one of the eight.

During this same summer of the *Making Standard Work* professional development I transitioned from being a classroom teacher into the role of curriculum coordinator at KSKMS. With this transition came the responsibility of me leading this Standards Early Adapters group, which began with the teachers incorporating standards into the units they were developing for their students. The process and template given to us was a long and treacherous process and did not motivate the group very much. We spent the first year trying the template while giving feedback of its use to a tri-campus department. The group immediately looked for ways to simplify the process, looking for a way that would make sense to us and to the possible expansion to the greater faculty organization-wide.
The overall focus of this tri-campus work was on the fundamental challenge of most educational institutions, improving professionals practice (Dufour & Marzano, 2011). The tri-campus goal and the set up of the Standards Early Adapters was intended to build on the collective capacity of our faculty to incorporate the Indiana standards into our curriculum. The regular feedback as well as artifact collections of revisions were maintained throughout the school year, specifically aligning the different campus in this endeavor to become a standards-based kula Hawai‘i. It allowed for an environment to extend the learning beyond the summer professional development through an ongoing, supported, and sustained method. The meetings times for the group were embedded into their work day and did not require the teachers to stay after work or come on weekends (Dufour & Marzano, 2011). Over time, this tri-campus focus changed and individual units were not required to have their Standards Early Adapters anymore. KSKMS decided to keep this group of teachers together in an effort to continue the use of standards on our campus.

The name Standards Early Adapters was not liked by the group and within three months we decided to change the name to something more meaningful and inspiring. Ka ‘Ike Loa, is a term that is interpreted as forward thinking, knowledgeable, or wise. It is derived from the song Nani Kaiwi‘ula, written by Manu Boyd to describe the Kamehameha Schools founder, Charles Reed Bishop. The group chose this name to honor Charles Reed Bishop, by striving to meet the demands of an evolving educational system. The name reminds the group of our humble beginnings and also encourages us to continue to work hard to achieve our task. From the beginning, our task as a group was to find ways to best support standards-based learning at KSKMS (T. Fox, personal communication, January 14, 2014).
In order to assist Ka ‘Ike Loa with building our understanding and capacity, we have been on the forefront of many new initiatives at KSKMS. This has given us an opportunity to see what is going on within the system, at a higher level, which helps in formulating the work we do at the ground level. These initiatives have included us developing our grade level, content area essential curricular pieces. This process was focused on the revision and replacement of the curriculum currently used at KSKMS (Hayes-Jacobs, 2010). The focus was on faculty identifying what they were doing with students and finding ways to align vertically with their content peers. We were looking for what Hayes-Jacobs (2010) calls, “Actual replacement of dated content, skills, and assessments with more timely choices” (p. 11). This planning was done with the principal and myself. Careful attention was placed on doing this slowly, in a non-threatening way to the faculty. We were looking for teachers to identify ways they will upgrade their curriculum in more engaging and powerful ways for students (Hayes-Jacobs, 2010). Ka ‘Ike Loa continued with carrying out the revision process of this work and keeping our teachers grounded in their essential curricular pieces.

As Ka ‘Ike Loa began to get more comfortable with their work in unwrapping standards, it was decided to extend their knowledge base. Edmondson (2012) describes the necessity of this knowledge, “To be successful groups must access knowledge, develop a shared understanding of how best to apply it, and act in a coordinated manner that is reflective of new insight” (p. 27). This first happened through the standardized testing being piloted at KSKMS. Ka ‘Ike Loa was presented data at a higher tier, deepening their understanding of the pilot happening at a tri-campus level as well as being extra support during presentations given to our entire faculty. This standardized testing has since moved out of the pilot stage and is fully operational organization-wide. This formative testing system allows teachers to respond to students based on their results.
from an adaptive test. The test results are provided to teachers within 24 hours of the student testing and can be used immediately for flex grouping, differentiation, etc. (Northwest Evaluation Association (NWEA, 2014).

During the 2011-12 school year, KSKMS committed to Education for Sustainability (EfS) and began our work with Jaimie Cloud. The overall focus of Education for Sustainability at KSKMS in on student achievement through the quality of instruction they receive in their classrooms (Dufour & Marzano, 2011). Teachers learn to design and embed the EfS standards into their curriculum and assessment. This has included our teachers receiving personalized coaching and work time toward the development of their curriculum in both an individual and team setting. Working with the EfS standards has contributed to the learning process at KSKMS. The use of these standards provide a bases for transforming and innovating curriculum (The Cloud Institute for Sustainability Education, 2012). In the following school year, all members of Ka ‘Ike Loa committed to become a part of our cohorts and have also received support and professional development in the use of EfS. Based on four responses of participants during interview #2, Ka ‘Ike Loa members see the engagement with this work as them being curricular leaders and early adapters of curricular involvement on our campus.

As of 2014, Ka ‘Ike Loa has been in existence for over five years. We have monthly retreats to work on our own professional development as well as to plan curricular, instructional, and assessment activities for the faculty at KSKMS. Continuous reflection is a part of Ka ‘Ike Loa’s normal educational practice, though it may not be the norm for most teachers at KSKMS as shared by three participants during interview #2. The members within Ka ‘Ike Loa come from diverse backgrounds in educational training, educational experience, and content specialty. The group members over the past five years have shifted, including teachers moving in and out of the
group for various reasons. Those teachers who left Ka ‘Ike Loa were due to transferring out of KSKMS and working at other schools.

The group’s role has two parts, one of personal development and one of school-wide development. Ka ‘Ike Loa builds their capacity through regular dialogue, resource sharing, observations of each other, and additional professional development throughout the school year. It is an ongoing process where group members work collaboratively through inquiry and action research in order to, ultimately, move forward teaching and learning at KSKMS (Dufour & Marzano, 2010). The individual, personal growth of the group is a goal that allows for a multi-layered affect at KSKMS as they are improving their practice as well as guiding the improvement of their peer’s practice. The school-wide support has been as facilitators in developing essential curriculum pieces within subject areas and has progressed to assessment development. They have also planned and engaged in dialogue and simulations to build their peer’s understanding of formative and summative assessment. The group works as a whole to design these opportunities for their teachers. The relationship and productivity of this group is not commonly found within the larger organization and their effectiveness amongst their peers is perceived as having high impact.

The school-wide support has been developed through the creation of a common framework of non-negotiable goals for teaching and learning set forth by the instructional leadership at KSKMS. Ka ‘Ike Loa facilitates this defined autonomy, which allows each content area the responsibility and authority on how they want to meet these goals (DuFour & Marzano, 2010). This defined autonomy has the framework from which each members knows were to begin, benchmarks that are used along the way to measure progress, along with a set of
objectives that need to be realized as we develop content area common performance tasks (Brown, 2009).

They plan with each other the curriculum renewal of our school and assist with the facilitation of content area groups in revising and updating curriculum at KSKMS. “Learning in teams involves iterative cycles of communication, decisions, action, and reflection, each new cycle is informed by the results of the previous cycle, and cycles continue” (Edmondson, 2012, p. 50). This ongoing curriculum renewal is also part of a larger campus and tri-campus initiative.

At Kamehameha Schools, as in most educational institutions, it seems as though there has been an unwillingness of teachers to work towards curricular improvement. In most cases this is seen as not wanting to work hard or disinterest in the well being of student. However, it is more about the need to create an environment to build the collective capacity of all teachers through promoting learning for all students in the structures and cultures provided within the larger system of the organization (DuFour & Marzano, 2010). Ka ‘Ike Loa serves as that connector where a shared vision of teaching and learning exists and the instructional leaders around KSKMS position themselves within the people they serve. Ka ‘Ike Loa works with our teachers to build shared knowledge and shared ownership for the curriculum developed at KSKMS (DuFour & Marzano, 2010). Ka ‘Ike Loa is an example of how teaming is the engine of organizational leadership, changing school culture. Kamehameha Schools, as an organization, must continue to learn in order to thrive in this ever-changing world. Ka ‘Ike Loa has been an example of how smaller, focused units of action can improve and innovate an organization (Edmondson, 2012).
Theoretical Framework

I used the Effectiveness Institutes’ *Teams That Work* characteristics as the theoretical lens to identify the experiences of Ka ‘Ike Loa. The characteristics identified by the Effectiveness Institute include 1) a high level of trust, 2) a high level of respect, 3) a shared commitment to a clear and common purpose, 4) a willingness and ability to manage conflict, 5) a focus on measurable results, and 6) alignment of authority and accountability. The Effectiveness Institute maintains that teams that work well together foster an environment of clear and honest communication and willing cooperation among all members toward goal accomplishment (Effectiveness Institute, 2013).

Amy Edmondson (2012) further explain the relationship of these characteristics:

Today, people engaging in teaming at work need to be responsible, accountable individuals who respect each other, understand the inevitable conflict, and accept the responsibility to sort through such difficulties. To promote teaming, leaders must trust those who lead. Trust them to figure out how best to meet the goal. This involves mistakes and missteps, also builds an environment of mutual respect. Trust and respect together make a workplace amenable to teaming and continuous learning (p. 41).

Leadership teams, including teacher leadership teams, have much to offer their members. They assist individuals in expanding their knowledge, acquiring new skills, and exploring different perspectives, etc. Collaborating with others develops interpersonal relationships and shared experiences through working together (Edmondson, 2012; Wageman, 2008).

Analyzing this group, their experiences, and identifying why they are successful may help others in Kamehameha Schools and the educational community as a whole. This is an
exploration of how the characteristics of any group must be thoughtfully incorporated in order to create the right ingredients for a successful team.

**Purpose of the Study**

The purpose of my research is to study the characteristics of this self-directed group of teacher leaders and identify ways these characteristics can be used in creating other successful teams at Kamehameha Schools and abroad. Ka ‘Ike Loa works collaboratively to design activities with faculty in order to move our curriculum, instruction, and assessment at KSKMS and I investigated the experiences that foster synergy within a group of instructional teacher leaders at Kamehameha Schools. In this research study, synergy is referred to as multiple characteristics of the group, that when combined, create a greater effect than the sum of their individual effects. For Ka ‘Ike Loa, this is the ability to put disparate pieces together through synthesis and combining these pieces into a new whole in order to meet the needs of the teachers they work with (Pink, 2006). The participants within this study helped to further define synergy of teacher leaders.

I am a practitioner researcher and this dissertation is practice-based, grounded in my practice and work with Ka ‘Ike Loa (Jarvis, 1998). Jarvis (1998) explains my sense of self-identity as a practitioner researcher, “Once they try to see themselves as researchers as well, their own role identity might change, and that might in turn affect they way they perceive and perform their practice role” (p. 8). As a practitioner researcher I am able be theory-focused in both my work with Ka ‘Ike Loa and my research. I was invited by Ka ‘Ike Loa to question their practice, reflect on it, and share back with them in order to improve our work and make possible impact to other groups in our organization and afar (Jarvis, 1998).
I employed a case study, phenomenological approach to identify the traits within the group that have enabled success. I explored the challenges the group has experienced and how they worked to overcome them. I identified what members of Ka ‘Ike Loa felt about their overall impact at KSKMS. My goal was to analyze the characteristics of this group that have had a positive impact at KSKMS in hopes that identifying these characteristics will help in future work teams have with each other at Kamehameha Schools. The overall guiding research question is, “What are the experiences that foster the synergy of Ka ‘Ike Loa?”
CHAPTER 2
REVIEW OF RELATED LITERATURE

Introduction

The review of the literature is organized around five major topics. The first section is focused on the six characteristics identified by the *Effectiveness Institutes: Teams That Work* framework. The second section is about synergy. Team dynamics is the subject of the third section. The fourth section is about motivation. The final section of the review of the literature is about innovation. The research question guiding the study is:

1. What are the experiences that foster synergy within Ka ‘Ike Loa?
2. What is synergy as defined by Ka ‘Ike Loa?

*Effectiveness Institute: Teams That Work Framework*

In this section of the review of the literature the characteristics identified by the Effectiveness Institute will be examined. This includes 1) a high level of trust, 2) a high level of respect, 3) a shared commitment to a clear and common purpose, 4) a willingness and ability to resolve conflict, 5) a focus on measurable results, and 6) mutual responsibility and accountability for outcomes. This framework was created 30 years ago and continues to evolve with recent research. The intent of the *Teams That Work* tool is to create a context for conversations that improve team performance. Honing these six characteristics is not only good for business, but is also more satisfying and rewarding for members of the team (Myers, 2014). Creating these conditions will help people succeed as a team and build the overall capacity of people to be successful in the work they are doing (Dufour & Marzano, 2011).
Effectiveness Institute defines trust as team members’ ability to rely on each other. This happens in three ways: 1) perceived integrity, which is our ability to say and do the right thing and there is consistency in what we say and do; 2) perceived authenticity, which is our belief that people are genuine and vice versa, and; 3) perceived caring, which is about others caring about us as a person and us caring for others as a person. Trust is dynamic and must be created and maintained over time. High performing teams can quickly identify when there is an issue with trust and are able to work through the issue (Myers, 2014).

Effectiveness Institute defines high levels of respect is the regard a team has for each other’s skills and abilities to accomplish tasks. These are the technical skills and competencies people possess in order to do a job (Myers, 2014).

Trust and respect produces a greater sense of confidence within a group and although they are connected, they are different. Trust is the ability to rely on each other and respect is having a high regard for each other’s abilities (Myers, 2014). In an environment with high levels of trust and respect people are comfortable with speaking up and giving feedback. Teams are able to engage in critical conversations that do not make others feel embarrassed or punished (Edmondson, 2012).

Teaming brings people from different backgrounds to solve problems and come up with new ideas through their shared commitment and common purpose. The Effectiveness Institute defines a shared commitment to a clear and common purpose as buy in. The words chosen for this characteristics are done with purpose and all have great meaning to the overall characteristic. Common refers to the higher order reason the team exist. At a very practical level this is what the team does, what difference does the team make, and to whom is their work making a difference for. The purpose must be clear to everyone within the group and through the clear and common
purpose there must be an overall commitment by the group to the work (Myers, 2014). A group based on a shared vision work to improve their classroom and school practice (Tobia & Hord, 2012).

It is important the work of a team is framed in a way that motivates the members to collaborate. Leaders cannot assume that everyone understand the work of the team in the same way. They must frame all assumptions and beliefs about the work the team is doing. This gives the leader of a team a high level of influence on how the team members view the purpose of the project and their role in achieving the purpose. Framing a shared goal creates a learning opportunity for the team to engage in an active way to accomplish the goal (Edmondson, 2012).

With this frame also comes the understanding and acceptance of competing constrains, which are the foundation of design thinking when working with a team. The first stage of the design process includes identifying these constraints and including them within the frame of the purpose (Brown, 2009). Senge (1990) shared Fritz’s belief on the necessity of constraints as, “The truly creative person knows that all creating is achieved through working with constraints. Without constraints there is no creating” (p. 144).

High performing teams operate in ways that build shared commitment to the clear and compelling purpose that resonates with the members of the team (Edmondson, 2012; Wageman, 2008). Working within a team can bring meaning to an individual’s life, liberating them to pursue the purpose for personal fulfillment (Pink, 2006). The purpose then serves as a motivation to the team, connecting them to things they feel they were born to do. This reward is beyond earning money, getting a bonus, or self-preservation; it is about them pursuing their passion (Edmondson, 2012; Robinson, 2009). As a team works to achieve their purpose they focus on their collective responsibility for teaming and learning. Together they work to endure the
hardships of learning and innovating (Edmondson, 2012). The purpose of the team must be challenging, but not impossible. The purpose must be consequential and it must be clear (Wageman, 2008). Wageman (2008) expands, “For the most outstanding teams, the level of clarity about purpose was just as high as the level of challenge members experienced in working together” (p. 210).

A team’s ability to communicate motivates people to share openly within a group. This builds a psychologically safe environment where can share their perspective without embarrassment (Edmondson, 2012). The team’s ability to have conversations, discussions, and disagreements about their purpose are essential to unite people and motivate them to overcome barriers (Edmondson, 2012; Myers, 2014). This creates an environment where everyone feels heard and knows they have influence on the purpose (Myers, 2014).

A team’s willingness and ability to resolve conflict is defined by the Effectiveness Institute as the ability to ask the difficult questions and address the issues. This means, there are no elephants in the room (Myers, 2014). The team’s ability to detect and correct errors before serious damage occurs is essential in an organization for learning (Edmondson, 2012; Wageman, 2009). The willing and able piece is a key point of understanding this characteristic because a person only having one part can harm the team. Some conflict is good and a team’s ability to manage the conflict is both necessary and helpful. It can be used to the team’s advantage (Myers, 2014).

Conflict is productive as teams experiment on ways to design and solve problems. It is productive if kept away from the personal and emotional aspects of conflict. It requires openness and a team’s willingness to explore rather than shy away from differing ideas. Tension can have positive results as they can evoke creativity and sharpen ideas. However, this only happens with
patience, wisdom, and skills. This fosters an environment where there is a commitment and willingness for a team to make mistake, be aware, and then adjust to better meet the need of the overall purpose. This improves the quality of decision and work of the group by engaging different points of views (Edmondson, 2012).

The team’s ability to learn from their failures is an essential skill related to a team’s willingness and ability to resolve conflict. A group needs to have an environment where people feel they have the ability to express themselves, their thoughts, and ideas, without fear of being penalized. An environment that gives team members the ability to ask questions, seek help, and tolerate mistakes while others are watching can be difficult, but necessary (Edmondson, 2012). Failure is necessary in both teams and learning organizations as from the failure comes learning.

Failure needs to be seen as a fact of life and a learning approach to innovation. Design and innovation is iterative and there is learning throughout the process (Brown, 2009; Edmondson, 2012). Edmondson (2012) describes the reason why failure is essential as, “The secret for organizations is to figure out how to gather and act on, rather than ignore and suppress, this potentially valuable information” (p. 78).

Highly effective teams are dynamic and have diverse talents. Rather than seeing this as a roadblock or a means for conflict, teams embrace the different ways of thinking each member brings and find ways of using these differences as strengths. They work to find ways to have these different strengths complement each other while compensating for each other’s weaknesses too. They challenge each other and take criticism, as equals and as an incentive to build their own capacity (Robinson, 2009). They use the willingness and ability to manage conflict to the team’s advantage (Myers, 2014).
Another important aspect of highly effective teams according to the Effectiveness Institute is the team’s focus on results. This is defined as the measurement of achievements and outcomes. What is being measured should be tied to the clear and common purpose, which highlights these measurements. It is natural that people want to do good work and they want to see how they are doing good work (Myers, 2014). The ability for a team to look back and reflect is a critical need in the team’s ability to examine results, assess results, and uncover new ideas. A team’s ability to embed reflection into their work, both throughout the process and at the end of the process, succeed as they are making their observations apparent and thinking of ways to work together to figure things out. (Edmondson, 2012).

The alignment and authority to accountability is the last characteristic of the Teams That Work framework and is when individuals act on defined roles and expectations within the team. The Effectiveness Institute also calls out four things that need to be clear for this to happen. 1) The members of the group have the authority needed to fulfill their expectation. Members are clear about the authority they have and are allowed to act on their defined roles in order to meet expectations. 2) Team members know what they are accountable for. 3) Team members know why they are accountable for these things. This is important at both the individual and team levels, everyone needs to know what he or she is accountable for and why he or she is accountable for it. When this does not happen, the lack of clarity can cause confusion and begin to breakdown trust. 4) Team members know how to ask for accountability when someone doesn’t do what is expected or does not do it to the level expected (Myers, 2014). “With clear boundaries and the structure that enforces them, you’re more likely to test the limits of current processes and knowledge. Team members and teams greatly increase their ability to collaborate, learn, and innovate” (Edmondson, 2012, p. 145).
“Holding people accountable builds fairness and responsibility, which removes the fear of leader arbitrariness” (Edmondson, 2012, p 144). In a group that organizes to learn, “Members have grown in competence and confidence, and with trust in each other, they hold each other accountable” (Tobia & Hord, 2012, p. 20). Brown (2009) elaborates on this, “It is better to take an experimental approach: share processes, encourage the collective ownership of ideas, and enable teams to learn from one another” (p. 17).

Members of an effective team are comfortable with each other, even in uncomfortable situations. Members are able to ask critical questions, ask for help, admit mistakes, and are able to say when they are not right (Edmondson, 2012). This enhances the authority and accountability of the team, as there are high levels of trust within the group due to everyone understanding the direction of the group and their role in getting the group to the destination.

With the characteristics of the Teams That Work framework, an environment is created where people can learn from one another. These characteristics identify how team can move in the same direction toward a committed goal where every one does their share of work. Teams awareness of how they are doing in each of these six areas will help to lead the group to synergy with each other (Effectiveness Institute, 2011). Incorporating these six characteristics cultivates a system that builds learning into day-to-day work to meet needs and promote success over time (Edmondson, 2012).

**Synergy**

In this section of the review of literature, synergy is defined according to groups working as teams. “Synergy comes from the Greek word synergism which means working together. This demands a platform for participation through the development of dialogues, between discipline
and people” (Benecke, Shurink, & Roodt, 2007). Synergy is referred to as multiple characteristics of the group, than when combined, create a greater effect than the sum of their individual effects. Robinson (2009) further describes synergy as, “Collections of people with similar interest who create something much greater than any of them could create individually-who became more that the sum of the parts” (p. 123). Synergy results from the interpersonal relationships making better use of resources, where the total effect is greater than the sum of the effects taken individually (Benecke et al., 2007). The integrated definition of synergy created by Benecke et al. (2007) is, “Synergy is a concept that describes the systematic processes whereby business units of diverse, complex organizations will generate greater value through working as one system than working separate entities” (p. 9).

A team’s ability to work together can achieve more than individuals alone because members can stimulate each other’s creativity, expanding the possibilities (Robinson, 2013). Robinson (2009; 2013) calls this the alchemy of synergy where the power of tribes is the work of actual creative teams (p. 123). “The combination of creative energies and the need to perform at the highest level to keep up with peers leads to an otherwise unattainable commitment to excellence” (Robinson, 2009, p. 123-124).

The relationships between a team and the connections they make are the creative energy needed for synergy. People thrive to make meaning between diverse, seemingly different disciplines (Pink, 2006; 2009). Their diverse expertise brings together inventive relationships that allow groups to experiment (Pink, 2006). Great creative teams are diverse and are composed of people with different skills with complementary talents (Robinson, 2009). Each member must have the same depth of skills in order for them to make a tangible contribution to the overall purpose of the group (Brown, 2009). These crossing of discipline boundaries will also cultivate
individuals’ ability to identify opportunities and make connections developing their own expertise (Pink, 2009). “It is their differences that make creative work together greater than the sum of their individual parts” (Robinson, 2009, p. 125).

The goal of this multi-disciplinary team is to bring together experts from various areas and combine their knowledge to achieve results that could not be done by any one discipline (Edmondson, 2012). Koestler (1989) describes this need as, “New synthesis arising in the brains of original thinkers through bisociation of previously unconnected matrices” (p. 230). He further explains how this “mental cross-fertilization” allows different disciplines to converge and combine to create new, innovative ideas therefore creating synergy (Koestler, 1989).

Different ways of thinking can also be a challenge to creativity and building synergy, diversity of talents are not enough. Teams need to find ways of using their differences as strengths and have a process where the strengths are complementary and help to compensate for each other’s weaknesses too. They are able to hold each other accountable and give each other feedback as an incentive to increase the productivity of the group as a whole (Bennis & Biederman, 1997; Robinson, 2009). Similar to nature, a team is a complex, adaptive system with many interacting parts. Complex adaptive system needs to self-regulate and respond to both external and internal triggers. The team’s flexibility and judgment is required to create an organization for learning that supports collaboration and innovation (Edmondson, 2012).

The ability for a team to manage these relationships will create an environment where the whole of the group exceeds the sum of its parts. The team understands the relationships between relationships, creating a rich environment for growth, which needs to be carefully nurtured daily (Jackson, 2013; Pink, 2009). The members of the team understand that they succeed together or
fail together, their performance complements each other, they display synergy (Edmondson, 2012).

Teaming needs to be set up synergistically, as a way of bringing people together to generate new ideas, find answers, and solve problems. Creating an environment of reciprocal interdependence is essential in getting work done, making improvements, and innovating within an organization (Edmondson, 2012). “Generalization has replaced specialization, collaboration has replace autonomy, empowerment has replaced power, and teamwork has replaced individualism” (Edmondson, 2012, p. 25). Teams that are well designed and well supported can achieve synergy. The work of a well designed team can surpass the achievements of a traditional team as each individual’s contribution is coordinated by the leader (Wageman, 2008). Teams needs the right conditions for growth and if the conditions are right, people grow in synergy with the people around them and the environments they create together (Robinson, 2009).

Regardless of profession, everyone has a need to cultivate an artistic sensibility. Pink (2009) explains how this can be done through the design process. As people find it, “Economically crucial and personally rewarding to create something that is also beautiful, whimsical, or emotionally engaging” (p. 65). Design is the human ability to shape and make sense of the environment around us. This is used as a means to make sense of our lives. Design is bringing together disparate things through interdisciplinary problem solving. Through design thinking we are producing people who are holistic thinkers (Pink, 2009). In the design process, each person is asked to be active participants, bringing expertise of their discipline in a space of innovation (Brown, 2009). This assists with a team’s ability to solve problem, understand others, appreciate and be in sync with the world around them (Pink, 2009). This is evident through all
stages of innovation: inspiration, ideation, and implementation (Brown, 2009). “Design helps us to learn how to work with people and how to be inspired by other people” (Pink, 2009, p. 72).

As people design as teams, they need to see the big picture and recognize the patterns of information around them; synergy. This information, along with intuition, are used with contextual reasoning to make sense of the world (Pink, 2006). Facts on their own are useless, but when individuals fit them together into a pattern, finding likeness and regularities amongst them they become of value. This ability allows people to create inventive ways to transform discrete information to universal categories (Csikszentmihalyi, 1990). Koestler (1989) uses the metaphor of mosaics to describe the importance of patterns, “Are not so much the individual bits, but the successive patterns into which you arrange them, then break them up, and rearrange them” (p. 235). Conceptual thinking is needed to synthesize information from divergent sources to make sense of work at an organizational level (Wageman, 2008). This can lead to conceptual blending which is the combining of two existing ideas that no one thought to unite. These powerful ideas require a team to be willing to experiment and make combinations that will inevitably include failure (Pink, 2009). The inspiration-centered focus contributes to positive aspects of the human experience, creating flow (Csikszentmihalyi, 1990; Pink, 2009).

Hayes Jacobs (2010) says, “The whole is substantially more relevant, more meaningful, more significant than the sum of the individual parts. Make no mistake, the parts are important. They are just not the goal” (p. 118). Synergy of people, ideas, etc. are needed to make the whole, to achieve the goal.
Team Dynamics

In this section of the review of literature, team dynamics is explored to deepen the understanding of synergy. The increasing need for interactive communication and collaboration are a part of the knowledge economy we live in today (Edmondson, 2012; Pink, 2009). A team’s ability to learn and adapt to their environment and to others is key for organizational success. There is a need for shifts from the usual organization set up of organize to execute to and environment that organizes to learn (Edmondson, 2012). Edmondson (2012) describes this shift of organizing to learn as creating an environment that fosters a collective learning experience that includes the following:

- Asking questions
- Sharing information
- Seeking help
- Experimenting with unproven actions
- Talking about mistakes
- Seeking feedback

These learning behaviors enables groups to obtain and process data needed to adapt and improve. Through collective learning, organizations can detect changes in the environment, learning about customer’s requirements, improve members’ collective understanding of a situation or discover the consequences of their previous actions. They require a willingness to take interpersonal risks such as discussing mistakes (p. 27).

Edmondson (2012) identifies “Teaming is a verb. It is a dynamic activity, not a bounded, static entity. It is largely determined by the mindset and practice of teamwork” (Edmondson, 2012, p. 13). Teaming is about relationships and even with much experience; it is something we
need to continue to work on (Moussavi-Bock, 2013). Teams are both a feasible need for an organization and are needed due to the demands from organization’s top leadership to get things done. In the end, an organization that learns creates an environment for teams to become more robust, creative, and adaptive as the members yearn for the satisfaction of their membership to the team as they develop their own leadership skills (Edmondson, 2012; Wageman, 2008).

Teams need to be properly set up and thoughtfully led. There are three essentials needed as basic prerequisite for a good team. The first essential is having a real team, with clear boundaries where team members know who is on the team and who is not on the team. They also need to be sure there is time for the team to work together and hone in on their ability to do so. The second essential is for the team to have a compelling purpose. This purpose needs be challenging and clear. The purpose should also highlight the interdependence of members and helps to orient members toward their objectives. The third essential needed is making sure team members have the capacities needed to function. This includes the knowledge, skills, and experience needed to contribute to the overall purpose of the team (Wageman, 2008).

An innovative organization is always looking for people who have the capacity and disposition to collaborate across disciplines. This creation of an interdisciplinary team allows for the sharing of ideas and specialties, building a collective ownership of ideas where everyone takes responsibility for the ideas that are developed (Brown, 2009). Effective teaming often requires integrating a range of disciplines, communicating despite different mental models, and being able to manage inevitable conflicts when people work together. Working on diverse teams can expand individuals’ networks of colleagues within the organization, helping with connections in future work (Edmondson, 2012).
In order to keep up with development in any field, most importantly education, people must be lifelong learners who work to master new skills and envision new possibilities through their work. This typically happens when individuals learn collectively, as a team, as a small group. People are interconnected working toward improvement, problem solving, and innovation (Edmondson, 2012).

With teaming comes the blending of people, who listen to each other’s points of view, coordinate actions, or make decisions. In order to be effective, it is essential for members of the team to be vigilant and aware of others’ needs and perspectives developing both the affective and cognitive skills of the entire group (Edmondson, 2012). Finding, what Robinson (2009) calls a tribe, can have transformative effects on a person’s sense of identity and sense of purpose (p. 114). The validation of being in this tribe provides a connection of passions and confirms you are not alone. This gives the opportunity to share ideas, bounce things around, and indulge in the enthusiasm of the team’s work. The tribe also inspires each other to raise the bar and build on personal skill set. The tribe together in one place provides an opportunity for mutual inspiration, which can lead to powerful teams that can drive innovation through the influence of each other (Robinson, 2009). The only way to move forward is to do it with the support of others, bringing them with you. Tribes are more influential than any individual, no matter what position they are in (Jackson, 2013).

As members see the results of the team’s collaboration they more fully contribute. Learning within the group becomes more active and people are excited about the work they are doing. Engagement increases and organizational learning becomes effortless as the team members share their latest thinking and practices. Creativity and innovation are unlocked as people are seeing successful implementation of their ideas and their work. There is critical mass
within the culture of the organization and the team’s common purpose is clear to all (Logan & Fischer-Wright, 2008). Essential to increasing the levels of collaboration on a team is leadership inclusiveness. Higher-status individuals participation within a group, actively inviting ideas and expressing their appreciation for other points of view shifts the culture within a team (Edmondson, 2012). The leader must draw on the skills and capabilities of those in the group to create a condition where the team operates in an effective and supportive environment (Wageman, 2008). There is organizational culture shift from hierarchy and efficiency to one of risk taking and exploration. People are deeply engaged and deeply motivated and have now experienced a feeling that few are willing to give up (Brown, 2009).

**Innovation**

In this section of the review of the literature, innovation and its connections with synergy and team dynamics are examined. Pink (2006) describes innovation as it relates to design as the ability to, “Create something that is beautiful, whimsical, and emotionally engaging” (p. 65). He further explains how it is human nature for us to shape and make sense of our environment in order to better meet our needs and give deeper meaning to our life (Pink, 2006). As educators this challenge is to match the needs of learners to the world, which is changing in a rapid pace. In order to do this, educators are challenged to be strategic in their learning and expand their perspectives and update the approaches they are using with students (Hayes Jacobs, 2010).

Innovation is about finding the hidden talents in everyday things. As a group works together, it is important for them to push beyond what is expected and find new ways of making sense of things. They expand what we know by rejecting normal order, messing things up, and rearranging the pieces in a way that makes sense for the group’s work. They tinker through an
iterative process in order to make sense of things (Anderson, 2012). An environment that fosters people to be free to do their best, imaginative work will increase the creativity of these people and groups (Bennis & Beiderman, 1997).

Failure in innovation is expected and is essential to building understanding. This allows for people to test ideas through the blending of their imagination, intuition, and intellect (Kamehameha Schools, 2010). IDEO, a global design firm centered around helping organizations around innovate and grow, has the mantra, “Fail often in order to succeed sooner” (Edmondson, 2012, p. 163). The IDEO teams believe they will succeed quicker if they fail often and there is much learning in each failure throughout the process. Through failure comes more investigation as a group works to design and innovate to meet the needs of those they serve (Bennis & Biederman, 1997; Edmondson, 2012).

The key source of innovation through design is the need for diverse and interdisciplinary teams. This helps the group to think more holistically, building the collective capacity as the groups weaves together their ideas into integrated forms (Edmondson, 2012; Pink 2006). This innovative environment inspires people as they work together, enhancing their ability to understand each other to solve problems (Pink 2006). Innovation that comes from design thinking relies on an individual’s ability to be intuitive, to recognize patterns, and to construct meaning from information. Design thinking is about exploring the possibilities and unleashes a disruptive, game-changing potential for work (Brown, 2009).

Interdisciplinary teams have replaced design thinking by the lone individual in order to tackle the wide range of problems needing solutions. Design thinkers know there is no one way to move through the design process. Instead there is a continuum of innovation and design done in orderly steps from the starting point and landmarks along the way. This begins with
inspiration where the opportunity to solve a problem manifests and a team is motivated to search for solutions. Ideation is the process of generating, developing, and testing ideas. This part of the design process is iterative and welcomes failure as new learning happens with each opportunity. There will be unexpected discoveries along the way and they will inspire the team to refine and rethink and continue to move forward to a solution. The last part is implementation, when the solution is determined and then shared with the larger community (Brown, 2009).

Pink (2006) elaborates on how it is important, in today’s society, to shift from high ability to high concept and high touch. High concept, “Involving the ability to create artistic and emotional beauty, to detect patterns and opportunities, to craft a satisfying narrative, and to combine seemingly unrelated ideas into a novel invention” and high touch, which, “Involves the ability to empathize, to understand the subtleties of human interactions, to find job in one’s self and to elicit it in others, and to stretch beyond the quotidian in pursuit of purpose and meaning” (p. 51-52).

Motivation

In this section of the review of the literature, motivation and its connections with synergy, team dynamics, and innovation will be explored. Individuals doing what they love can transform experiences making them focused and intent, living in the moment (Robinson, 2009). An individual finding their Element as defined by Robinson (2009) as, “The meeting point between natural aptitude and personal passion… and has the ability to take people beyond the ordinary experiences of enjoyment or happiness” (p. 21). As we get into the heart of the Element there are physical changes we experience, breathing changes, out mind merges with our bodies, and we are drawn effortlessly to our work. We get into a flow, or a zone, where we have a sense of
discovery, where we are pushed to a higher level of performance and growth (Csikszentmihalyi, 1990; Robinson, 2009). Phil Jackson in Eleven Rings: The Soul of Success (2013) calls this a “spiritual addition” where the sense of connectedness is so powerful and so joyful that you never want it to stop (p. 249).

An environment that fosters positivity will help foster people to be more motivated, efficient, resilient, creative and productive. This will help to drive performance of a group upwards. Happiness is the joy an individual feels when they are striving to meet their potential. It predicts the way the brain processes the world and changes the way people affect their reality (Achor, 2010). Achor (2010) says, “Happiness causes success when they started to examining how positive emotions affect our brain function and change our behavior” (p. 43).

Csikszentmihalyi (1990) elaborates on motivation as what he calls optimal experience. He defines this as a time when, “We feel a sense of exhilaration, a deep sense of enjoyment that is long cherished and that becomes a landmark in member for what life should be like” (p. 3). Through his research he has come up with universal conditions that are needed in order for an experience to be enjoyable and motivating. These include confronting tasks that are challenging, but not too much as there needs to be a chance to complete it. The tasks take concentration and focus. The task should have clear goals and means to provide immediate feedback. This activity should allow one to have a sense of control over their action, which allows for their sense of self to disappear. Through a person’s engagement in this activity the sense of time is altered and passes much quicker than it feels (Csikszentmihalyi, 1990). As a person works to achieve this state, they get into what Csikszentmihalyi (1990) calls flow, which is a psychological concept, “The total engrossment of what you are doing” (p. 4).
Being in the zone, when a person is in their Element experiencing flow, they unify their energy and attention to realistic goals that match their skills and the opportunity for action. Being in this state gives a person a deep connection to their sense of identity and is relaxing. Being in this state doesn’t take energy but instead gives energy (Robinson, 2009). The desire to have this feeling again, to have this sense of enjoyment again, pushes us to stretch our skills and find new opportunities in using them (Csikszentmihalyi, 1990). One of the strongest signs of being in the zone is the freedom felt because you are naturally good at something, you are centered and feel like you know who you truly are. A person feels they are doing exactly what they are meant to be doing (Robinson, 2009). Csikszentmihalyi (1990) states, “Great thinkers have always been motivated by the enjoyment of thinking rather than by material rewards that could be gained by it” (p. 126).

Being in a state of flow helps to achieve a greater purpose because there is a concentration needed to get the task done. Being in the state of enjoyment a person has the ability to face a challenge with the skills they possess and absorb the activity. With the clear goal and feedback throughout the process, there is a loss of self-consciousness and the experience is transformed (Csikszentmihalyi, 1990; Goleman, 2005; Robinson, 2009). When greater demands are placed on people they seem to do things greater than they usually would (Goleman, 2005). Robinson (2009) illustrates this, “When you are inspired, your work can be inspirational to others. Being in the zone taps into your most natural self. And when you are in that place, you can contribute at a much higher level” (p. 96). People need to be intrinsically motivated and be connected and sustained by the joy of problem solving (Benssi & Biederman, 1997).

Maslow has defined similar key steps in attaining self-actualization in his book, *The Farther Reaches of Human Nature*. Maslow’s key steps are described by Jackson (2013):
1. Experiencing life “vividly, selflessly, with full concentration and total absorption”

2. Making choices from moment to moment that fosters growth rather than fear

3. Becoming more attuned to your inner nature and acting in concert with who you are

4. Being honest with yourself and taking responsibility for what you say and do instead of playing games and posing

5. Identifying your ego defenses and finding the courage to give them up

6. Developing the ability to determine your own destiny and daring to be different and non-conformist

7. Creating an ongoing process for reaching your potential and doing the work needed to realize your vision

8. Fostering the conditions for having peak experiences, or what Maslow calls “moments of ecstasy” in which we think, act, and feel more clearly are more loving and accepting of others. (p. 123-134).

Basic characteristics of a person achieving self-actualization includes a person having a greater acceptance of themselves and others, high levels of creativity, and in a growth mindset where the focus is on problem solving (Jackson, 2013).

Motivation is cultivated in people who are in a growth mindset. Carol Dweck (2007) says this is, “The belief you can develop yourself. You’re oriented toward learning, you need accurate information about your current abilities in order to learn effectively” (p. 11). Characteristics of a person in a growth mindset include the ability to seek out challenges. People actually thrive on it and seek bigger challenges in order to continue to stretch themselves and build their own personal capacity. The development of these skills must be done over time and do take effort. A growth mindset allows people to love what they are doing and continue to do it, even in the face
of challenges and failures. People value what they are doing, no matter the outcome and with this value comes the ability to tackle problems and continue working on what is important. Failures, when in a growth mindset, are okay and are seen as an opportunity to change and grow. There is a belief that there is still a path to success, it will just take time and perseverance to get there. In a growth mindset, people understand that creativity is a result of hard work and dedication. A culture of growth mindset creates a motivated and productive environment supporting an organization that learns (Dweck, 2007; Edmondson, 2012). Through a growth mindset, “It has become increasingly clear that fearless teachers engage in continuous learning, maintain a current knowledge and skills base, and participate in making decisions about where, how, and when to employ the skills and knowledge they have to share” (Tobia & Hord, 2012, p. 20).
CHAPTER 3
RESEARCH DESIGN AND METHODOLOGY

Research Questions

The overall purpose of the study was to examine the synergy within the teacher instructional leadership group, Ka ‘Ike Loa. The overall research questions of the study were:

1. What are the experiences that foster synergy within Ka ‘Ike Loa?
2. What is synergy as defined by Ka ‘Ike Loa?

This qualitative study included a series of interviews to identify the common characteristics of each person’s experience and find the common strands that run through. The method used to gather data in this study was two individual interviews with each participant and one natural group interview with all members of Ka ‘Ike Loa. An assessment was also administered to all members of Ka ‘Ike Loa. This assessment generated a team report provided from Effectiveness Institute to all members. This report was debriefed with the entire group through a certified Effectiveness Institute consultant and was done at the beginning of the natural group interview.

All members of Ka ‘Ike Loa as of Spring 2013 were asked to participate in this study. The first interview was conducted in Summer 2013 and the focus was on the sharing of two artifacts that I asked them to prepare ahead of time. The first artifact was a visual representation for the participant to reflect on who they were as a first year teacher and the second was to reflect on who they are today as an instructional teacher leader and member of Ka ‘Ike Loa. The first interview was focused on building my understanding of the individual teacher and their capacity that brings value to Ka ‘Ike Loa. The second interview was held in early Fall 2013 and was
focused on the synergy of the group, identifying how Ka ‘Ike Loa has been successful, overcome their challenges, and been able to affect change at KSKMS. After the second interview, but before the natural group interview, I administered the *Teams That Work* assessment, which is a tool used to assess the team’s current level of team performance. This assessment included 30 questions and was used to stimulate discussion amongst the group during the natural group interview. The natural group interview included all members of Ka ‘Ike Loa where I used data pulled from the individual interviews to ask for group responses together. The intent of this strategy was for the participants to further articulate their understandings, experiences, etc. with the assistance of other group members.

*Theoretical Framework*

The Effectiveness Institute’s *Teams That Work* theoretical framework underlies this research. The characteristics identified by the Effectiveness Institute include 1) a high level of trust, 2) a high level of respect, 3) a shared commitment to a clear and common purpose, 4) a willingness and ability to resolve conflict, 5) a focus on measurable results, and 6) mutual responsibility and accountability for outcomes. The *Teams That Work* framework identifies collaborative teamwork is sharing talents, skills, and resources in order to accomplish a goal in spite of adversity and obstacles (Effectiveness Institute, 2011).

*Research Design*

I am a practitioner researcher who works with the six instructional teacher leaders and all of us comprise the group Ka ‘Ike Loa. The data of this qualitative research were the words of the participants. This qualitative research was intended to give as Patton (1990) describes, “Thick
description in such a way that we can understand the phenomenon studies and draw our own interpretations about meaning and significance” (p. 438). Two individual interviews and one natural group interview were conducted with the six participants. Patton (1990) notes, “The purpose of interviewing is to find out what is in and on someone else’s mind. The purpose of open-ended interviewing is not to put things in someone’s mind but to access the perspective of the person being interviewed” (p. 278). The interview questions included the asking of specific events that would help me to identify what synergy is to the members of Ka ‘Ike Loa and how this group continues to foster this synergy (Maxwell, 2013).

The objective of this phenomenology case study was to identify the traits within the group that have enabled success. I also identified the challenges of the group and explore how they worked to overcome them. My goal was to analyze the characteristics and traits of this group that has had a positive impact at KSKMS in hopes that the identified characteristics can be used to foster synergy in others areas within our school and beyond. Table 1 shows how the interview questions from all three interviews used in the study relate to the research questions of the study. Creswell (2013) writes, “Phenomenologists focus on describing what all participants have in common as they experience a phenomenon. The inquirer then collects data from persons who have experienced the phenomenon, and develops a composite description of the essence of the experience for all of the individuals” (p. 76).

This case study helped me to look at this real-life group, already structured at KSKMS and already in progress (Creswell 2013). Creswell (2013) describes, “The intent of conducting the case study can be composed to illustrate a unique case, a case that has unusual interest in and of itself and needs to be described and detailed” (p. 98). “The purpose of a case study is to gather comprehensive, systematic, and in-depth information about a case of interest” (Patton, 1990, p.
Since the dynamics of Ka ‘Ike Loa is not always found within the organization, looking at the group in more detail could assist us in becoming a learning organization, where teaming is the engine and where we thrive for continuous change (Edmondson, 2012).

This study addressed the phenomenon of synergy and how working as a team is the key to unlocking the creative power of an organization (Brown, 2009). Our shift as an organization that executes to an organization that learns requires us to be on the lookout for people with the capacity and disposition to collaborate across disciplines (Brown, 2009; Edmondson, 2012). Brown (2009) describes this happening, “When a team of talented, optimistic, and collaborative design thinkers come together, a chemical change occurs that can lead to unpredictable actions and reactions” (p. 28). The stories shared by each participant in this study gave me appropriate contextual data to identify and interpret how this group defines synergy.
### Table 1.

**Interview Questions as Related to Research Questions**

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Interview Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the experiences that foster synergy within Ka ‘Ike Loa?</td>
<td>Explain any relationship you see between these artifacts and your work with Ka ‘Ike Loa.</td>
</tr>
<tr>
<td></td>
<td>Share a rewarding experience you have had working with a fellow teacher.</td>
</tr>
<tr>
<td>What is synergy as defined by Ka ‘Ike Loa?</td>
<td>Describe the moment you felt the most synergy as a member of Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>What have you done as a member of Ka ‘Ike Loa that you couldn’t do on your own?</td>
</tr>
<tr>
<td>Interview #1 Questions</td>
<td>How did you become a member of Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>What keeps you as a member of Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>What are the supports that make Ka ‘Ike Loa work?</td>
</tr>
<tr>
<td></td>
<td>What are the barriers that get in the way of Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>What do you think can be done to increase synergy within Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>What advise would you give others who are working together in a group similar to Ka ‘Ike Loa?</td>
</tr>
<tr>
<td>Natural Group Interview Questions</td>
<td>How has Ka ‘Ike Loa added value to who you are as a teacher?</td>
</tr>
<tr>
<td></td>
<td>How are you inspired by the people within Ka ‘Ike Loa?</td>
</tr>
<tr>
<td></td>
<td>In the interviews many of you talked about out work designing as a group (rainbow-curriculum connections, Drop it Like it's Hot). You folks described how there were times Ka ‘Ike Loa brought disparate things together and developed a solution. How did Ka ‘Ike Loa navigate its way though the design process during these times? Include what worked and what didn't work and how we handled the ups and downs.</td>
</tr>
<tr>
<td></td>
<td>Story and laugh do play a role in this group as discussed in many of the interviews. Explain the impact you feel this has on the group?</td>
</tr>
</tbody>
</table>

**Population**

Given that the purpose of this study was to examine the experiences that foster synergy within the instructional teacher leader group of Ka ‘Ike Loa, I selected only the members of the
group for this research. Additional members were added to Ka ‘Ike Loa during Fall 2013 and they were intentionally kept out of the individual interviews as the focus was on past experiences of group members. The two new members were included in the administering of the Teams That Work assessment tool and debrief with consultant since the tool will be used in future work of Ka ‘Ike Loa that goes beyond this research.

The participants in the study were six middle school teachers who are all full-time faculty at KSKMS. All participants have been a part of Ka ‘Ike Loa for over one year. Purposive sampling was used in this study. Patton (1990) describes this as, “Instead of studying some representative sample in the setting, the evaluator may focus on studying and understanding selected cases of special interest” (p. 233). With the selection of Ka ‘Ike Loa, “The sample was purposefully biased, not to make the program look good, but rather to learn from those who were exemplars of good practice” (Patton, 1990, p. 233).

The study was conducted through two individual interviews, one natural group interview, and the Teams That Work assessment tool. I gained permission to conduct the research at Kamehameha Schools through the submission of my Human Studies Program research approval to the Kamehameha Schools’ Vice President of Administration.
Table 2.

**Participant Profile Log**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
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<td></td>
<td></td>
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<td>Secondary English</td>
<td>Secondary Socials</td>
<td>Math/ Education</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Math Emphasis</td>
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<td></td>
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<td>MLMED/ Private School Leadership</td>
<td>MLMED/ Counseling</td>
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<td></td>
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<td>8</td>
<td>7</td>
<td>38</td>
<td>18</td>
<td>21 1/2</td>
</tr>
<tr>
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<td>1</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Original Ka ‘Ike Loa Member</td>
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<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>yes</td>
</tr>
</tbody>
</table>

**Data Collection**

Permission to conduct the study was obtained from Kamehameha Schools as well as the Institutional Review Board at the University of Hawai‘i at Mānoa (see Appendix A). All participants were provided a Consent to Participate in Research Project form that detailed the purpose of the study, the confidentiality of the data from the study, the activities and time commitment, the benefits and risks for the participant, and contact information for me as the researcher (see Appendix B). Each participant signed the statements and a copy was provided to them. Participants were assured of their confidentiality throughout the study through the use of
pseudonyms. As the researcher I chose pseudonyms based off of the artifacts shared by each participant during the first interview. Hawaiian words were used to further assure the participants confidentiality.

Data collection for the study began in Summer 2013. I interviewed each participant two times for approximately 30 minutes each time. Interviews were audio taped and were transcribed. I reviewed the transcriptions for accuracy within a week. I conducted each of the interviews and took notes, capturing salient points and noteworthy quotes. I followed up each of my interviews memoing with guiding questions immediately upon the conclusion of the interview. All audio files, individual interview notes, and memos were then uploaded to a computer for future analysis. Only I had access to the data and other sources of data gathered from the field notes. The pseudonyms were used for all cataloging of audio files, interview notes, interview transcripts, and memos.

I contacted each participant in person to request his or her participation in the study. Scheduling was done via email, where I allowed each participant to select the time and place for all interviews. All, but one interview took place in my office at KSKMS. I was unable to schedule the second interview with two participants. After several attempts and consultation with the program advisor as well as my research advisor, I decided to continue to move on with the data collection excluding the two participants in the second interview. Although one of these two participants considered withdrawing from the study, she did not, and carried through as a participant with the use of the Teams That Work assessment tool and natural group interview. See Table 3 for the Data Accounting Log of communications and interviews with the participants.
Table 3.

**Data Accounting Log**

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<tr>
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<th>Kānana</th>
<th>Ka<code>i</code>ini</th>
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<th>Kekoapono</th>
<th>Makamaka</th>
<th>Pulelehua</th>
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<td>6/14/13</td>
<td>6/18/13</td>
<td>6/27/13</td>
<td>6/28/13</td>
<td>6/12/13</td>
</tr>
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<td>6/7/13</td>
<td>6/13/13</td>
<td>6/19/13</td>
<td>6/11/13</td>
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<tr>
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</tr>
<tr>
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<td>8/22/13</td>
<td>8/22/13</td>
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</tr>
<tr>
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</tr>
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<td>n/a</td>
</tr>
</tbody>
</table>

The first interview began with a description of the study, details of the participants’ role in the research, and a review of the overall interview process and their activity and time
commitment (see Appendix C). Each member was sent an email at least one week prior to the first interview asking them to come prepared to share two artifacts related to them. The first artifact was a visual representation for the participant to reflect on who they were as a first year teacher. The second artifact was a visual representation to reflect on who they are today, as an instructional teacher leader and member of Ka ‘Ike Loa. The use of the artifact was to allow participants to think in metaphors as a decentering device (Miles, Huberman, & Saldana, 2013). “Metaphors will not let you simply describe or denote a phenomenon, you have to move up a notch to a more inferential or analytical level” (Miles, et al., 2013, p. 281). The first interview’s purpose was to build my understanding of the individual teacher and getting them comfortable to share with me more about their experiences on Ka ‘Ike Loa. The focus of this interview was only on them as an individual.

The second interview was held in early Fall 2013 and was focused on the participant and their relationship to Ka ‘Ike Loa (see Appendix D). At the beginning of the interview each participant had the opportunity to review and respond to the transcription content from his or her first interview. This included questions probing for experiences when participants felt synergy, identifying strengths of the group, challenges and barriers of the group and how they were overcome, and participants’ perspectives of how Ka ‘Ike Loa affects change at KSKMS. These questions were designed to gather the participants thoughts of their experiences regarding synergy from their perspective as a member of Ka ‘Ike Loa.

Both the first and second interview included a validation of the participants’ information, as it would be used in research analysis. Having a validation system for respondents allowed me get feedback from the participants to confirm data and conclusions used in the research. Maxwell (2013) states, “This is the single most important way of ruling out the possibility of
misinterpreting the meaning of what participants say and do and the perspective they have on what is going on, as well as being an important way of identifying your biases and misunderstandings of what your observed” (p. 126-127). This was done through the validation of the Participant Profile Log (see Table 2), transcripts, as well as recapping my understanding during the natural group interview.

After the second interview, but before the natural group interview, I administered the Teams That Work assessment. This was sent to each participant via email with a personalized link. The tool was administered through the Effectiveness Institute and a consultant who is trained in its administration. The individual results of this assessment were anonymous to both the consultant and me. The 30 questions were on a Likert scale and are completed online by each participant. The assessment collects the perception of all team members on what it is like to be a member of Ka ‘Ike Loa. The tool’s intended use is to stimulate discussion about what is working and what is not working within Ka ‘Ike Loa.

The natural group interview was conducted after all members completed the Teams That Work assessment (see Appendix E). The first one hour and fifteen minutes of the natural group interview was given to the consultant for her to debrief the data on our assessment (see Appendix F). Each group member was given a copy of the Teams That Work Team Report and after a brief description of how it can be read; the group began analyzing the data. The consultant facilitated this by going through each trait individually and asking the group member to identify which statement got the highest response and which statement got the lowest response. The group then discussed their reasoning on why those rating were as shown in the tool. The remaining 45 minutes of the natural group interview was left to me asking the group questions that intended to create an environment where the participants could further articulate their understandings and
experiences as a member of Ka ‘Ike Loa. My hope was that answering these questions as a group would add a depth to responses that answering individually would not give. “Groups stimulate their members’ thinking by increasing the input, bringing in ideas from a new angle, and creating a contagiously playful thinking environment” (Miles, et al., 2013, p. 282).

In addition to the 11 transcripts, field notes from each interview, memos from the initial analysis, the Teams That Work assessment tool, and artifacts from Ka ‘Ike Loa’s work were collected then analyzed.

**Coding Structure**

The analysis used in this research was based on the phenomenon of synergy amongst Ka ‘Ike Loa. This focus was a result of my work with the group as a practitioner researcher as well as the review of literature. The research questions, interview protocols, and identification of artifacts collected were driven by this focus. My theoretical framework guided the analysis of data and helped to reduce the data into more focused and manageable units (Yin, 2009). As recommended by Miles, et al. (2013) I analyzed data concurrently with data collection. This assisted me with, “Thinking about the existing data and generating strategies for collecting new, even better data” (p. 70).

This case presented a unique context that was analyzed through interviews and artifacts from Ka ‘Ike Loa. I have a familiarity with the context of this case study as a practitioner researcher and a member of Ka ‘Ike Loa and due to this I did not need to gather evidence of the context.

Following each interview I spent time alone, reflecting on the interview experience and my notes. These memos included guiding questions that helped me to reflect on my expectation,
examine the outcomes, and begin to identify themes or unexpected similarities (Miles, et al., 2013).

I took inventory of all the data I had assuring what I needed was included. I had all interviews transcribed and listened to the audiotape to correct any transcription errors noticed (Miles, et al., 2013). I first read and listened to each interview transcript separately, without highlighting or making any notes. This review of audio recordings and transcripts gave me an opportunity to immerse myself in the data and begin to gather some preliminary themes (Creswell, 2013; Patton, 1990).

I then began going through the steps of analysis as defined by Creswell (2013), “The central steps of coding the data (reducing the data to meaningful segments and assigned names for segments), combining the codes into broader categories or themes, and displaying and making the comparisons in the data” (p. 180).

I read each of the transcriptions looking for evidence through my theoretical lens of the Teams That Work framework and synergy from each of the participants (Saldana, 2008). I also looked for other key words or concepts that were resounding in multiple interviews (Maxwell, 2013). Jotting was used in order to identify a code to a chunk of information (Miles, et al., 2013). I also incorporated memoing into my process of understanding and making sense of my data (Maxwell, 2013). These memos included in situ, or detailed description of what I saw within the context of Ka ‘Ike Loa and what they described (Creswell, 2013).

Coding is an opportunity for discovery, a heuristic, and is a cyclical act. As Saldana (2008) explains, “Rarely is the first cycle of coding data perfectly attempted. The second cycle of recoding further manages, filters, highlights, and focuses salient features of the qualitative data record for generating categories, themes, and concepts, grasping meaning, and/or building
theory” (p. 8). He goes on to explain coding, “I advocate that qualitative codes are essence-capturing and essential elements of the research story that, when clustered together according to similarity and regularity – pattern – they actively facilitate the development of categories thus analysis of their connections” (p. 8).

My first cycle coding began with initial notations to chunks of data as I read and listened to transcripts and assisted with the initial summarization of data (Miles, et al., 2013). I then read through each interview and made notes on key terms or concepts that came up. I used descriptive coding, “Which assigns labels to data to summarize in a word or short phrase the basic topic of a passage of qualitative data” while looking for evidence of the six characteristics of my theoretical framework and synergy (Miles, et al., 2013, p. 74). My firm understanding of the context this use of descriptive coding assisted me with developing a more general theory of what was going on within the group (Maxwell, 2013).

I also used in vivo coding as I was working to see what other themes would arise. Miles, et al. (2013) define in vivo as, “Using words or short phrases from the participant’s own language in the data record as codes” (p. 74). The use of in vivo by qualitative researchers helps to honor the participant’s voice as well as recognize the indigenous terms used in the interviews (Miles, et al., 2013). As Maxwell (2013) describes in vivo coding, “It provides you with an understanding of the meaning that these things, actions, and events have for people who are involved in them, and the perspectives that inform their actions” (p. 67). This understanding of in vivo coding was critical in my making sense of the situations, activities, and experiences that made up the group Ka ‘Ike Loa. This became a key component in my theory of research (Maxwell, 2013).
Throughout each cycle of coding, jotting was a major factor. This was done as handwritten notes in the margins of the transcripts. This was used as a place for me to notate my, “Fleeting and emergent reflections and commentary as they emerged” (Miles, et al., 2013, p. 94).

Miles, et al., (2013) goes on to explain,

As coding proceeds, if you are alert about what you are doing, ideas and reactions to the meanings of what you are seeing will well up steadily. These ideas are important; they suggest new interpretations, leads, and connections with other parts of the data and they usually point toward questions and issues to look into during the next wave of data collection and to ways to elaborating some of these ideas (p. 94).

In the second cycle coding I took the large amounts of data I had to condense to smaller units, more manageable to analyze. This was done through a matrix display, that organized a vast array of condensed data into a table that was used for reflection and drawing conclusion (Miles, et al., 2013). This was organized where each general theme was a column and each row was one of the participants and their specific interview responses. This assisted in pulling out the relevant data from the multitudes of pages from the interview transcripts (Miles, et al., 2013).

Once the matrix display was completed, I reviewed data by theme and began analytic memoing to synthesize data that was connected and relevant to each other. Miles, et al. (2013) share, “Analytic memos are primarily conceptual in intent. They don’t just report data; they tie together different parts of data into a recognizable cluster, often to show that those data are instances of a general concept” (p. 96). The use analytic memos throughout the analysis process were a useful tool in making sense of the data through the connection of relational information (Miles, et al., 2013).
Validation

Qualitative research is designed to investigate and build understanding within a given context. Qualitative researchers spend extensive time in the field, probing and finding information to create meaning from their research. Due to this validation, reliability, and standards of quality are needed to strengthen research (Creswell, 2013).

The researcher plays a major role in qualitative research, “The validity and reliability of the qualitative data depends to a great extent on the methodological skills, sensitivity, and integrity of the researcher” (Patton, 1990, p. 11). Maxwell (2013) defines validity as, “The correctness or credibility of a description, conclusion, explanation, interpretation, or other sort of account” (p. 122). Eisner (1991) states, “We seek a confluence of evidence that breeds credibility, that allows us to feel confident about our observations, interpretations, and conclusions” (p. 110). My role in creating validity was pulling together the pieces of the research and data to formulate a theory and this was done through triangulation (Creswell, 2013).

Creswell (2013) defines triangulation as, “The process involving corroborating evidence from different sources of data to shed light on a theme or perspective. When qualitative researchers locate evidence to document a code or theme in different sources of data, they are triangulating information and providing validity to their findings” (p. 251). In this study, the triangulation of data was accomplished by using documents from Ka ‘Ike Loa, data from the interviews, and the review of literature.

A key concept to validity is a validity threat, which is a way the researcher might go wrong (Maxwell, 2013). In qualitative research the evaluation of validity threats occur after the research has begun. “This approach requires you to identify the specific threat in question and to develop ways to attempt to rule out that particular threat” (Maxwell, 2013, p. 123). A validity
threat in my research is my being an administrator, conducting research with a group of teachers in my school. This required me to be aware of this power relationship in my interactions while I gathered data. Another area for me to be aware of throughout this research was my relationship with this group as a practitioner researcher. Because I have been with them since the inception, this is a group that is near and dear to my heart. They have been a successful group on our campus and my awareness of this success and this research as the rest of the KSKMS faculty and staff perceives it is something I needed to keep in mind as well.
CHAPTER 4
ANALYSIS OF DATA

Introduction

The purpose of this study was to examine the experiences that foster synergy within the instructional teacher leader group, Ka ‘Ike Loa. I sought to identify the characteristics within the group that have enabled success. I also sought to uncover the barriers and challenges of the group and explore how they were able to overcome them. My goal was to analyze the characteristics of Ka ‘Ike Loa that have had a positive impact at KSKMS and that identifying these characteristics will help in future work done by teams at Kamehameha Schools and beyond. The specific research questions that guided the study were:

1. What are the experiences that foster synergy within Ka ‘Ike Loa?
2. What is synergy as defined by Ka ‘Ike Loa?

Qualitative interviews were conducted to gather data from the six study participants. The data are presented in this chapter organized around the two major research questions and theoretical framework. Data collection occurred from Summer 2013 through Fall 2013 and the six participants were each interviewed individually twice, participated in a natural group interview, and took an online assessment. All of the individual interviews were conducted at a date and time of each participant’s choosing. All questions used during the interview process were aligned with the research questions of the study (see Table 1).

Participants were selected to be a part of this research based on being a member of Ka ‘Ike Loa as of Summer 2013. All participants were teachers at KSKMS at the time and had been members of Ka ‘Ike Loa from 1-5 years. Three of the participants are original members, two
participants joined Ka ‘Ike Loa two years later during the 2011-12 school year, and one member joined Ka ‘Ike Loa four years later during the 2012-13 school year. Five participants are female and one is male. Participants educational teaching experience range from seven years through 38 years.

Organization of Data Analysis

This chapter is organized into three major sections around the research questions of the study. The first major section describes the participants perspectives of their work with Ka ‘Ike Loa through the Teams That Work framework. The second major section describes the participants’ interpretations and experiences that are synergistic to them. The third major section of this chapter describes additional commonalities that rose to the surface throughout the individual and natural group interviews. Within each major section, the responses from the six participants are grouped and reported around common themes.

The analysis used in this research was based on the experiences that foster synergy within this teacher leader group called Ka ‘Ike Loa. Through the analysis, the development of new understanding transpired and these themes are also analyzed in this chapter.

Teams That Work Framework

The six participants responded to questions structured around the research question as well as the characteristics identified in the Teams That Work framework in both their individual and natural group interview. There was a strong relationship between the six characteristics in the Teams That Work framework and the work Ka ‘Ike Loa does as a high performance team.
High Levels of Trust

The data from the *Teams That Work* assessment showed that 89% of Ka ‘Ike Loa felt that members of the team did what they say they will do. In debriefing this as a group, members highlighted the task-oriented nature of group members and the value the group sees in doing what is needed as a team. Eighty-nine percent of Ka ‘Ike Loa members said that team members act with integrity and are supportive of each other, even when they are not together (see Table 4).

Table 4.

*Teams That Work Assessment Tool: High Levels of Trust*

<table>
<thead>
<tr>
<th></th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members of our team do what they say</td>
<td>78%</td>
<td>11%</td>
<td>0%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td>will do.*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team members act with integrity.</td>
<td>78%</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

The trust members of Ka ‘Ike Loa have for each other is evident with the consistency of what the group says and does (Myers, 2014). This creates a strong connection within the group and includes providing each other support and advice to help each other improve and master different foci of the group. Makamaka described an example of this as, “The fact that I can go to any of the other committee member and talk. I feel like within the group, we support each other well.” Pulelehua further elaborates, “When we’re trying to work with our teams and we have a hard time, we’re able to ask each other. It’s become a kind of support group.” Makamaka talks about contrary experiences to this in other groups, “When you’re in the room, you’re talking the talk and everything, but then you go outside and you start bad mouthing.”
Real conversations happen within the group because of the high level of trust. Members of the group are comfortable saying what they think and feel and are equally comfortable with giving or receiving feedback. This opens individuals within the group to getting help from others. Keao describes this as being, “Comfortable saying help me out with such and such.” There is a genuine connection and relationship because of the high levels of trust (Myers, 2014). They are able to ask each other hard questions and they are responded to without judgment. Pulelehua said, “I think it is a big part of why I feel safe to ask hard questions of each other.” She adds, “We will say things, very blatant or honest to get a point across. And I don’t ever feel it goes anywhere but here.” Keao describes this characteristic of the group’s trust as “People are comfortable with saying, You know, so it’s not my thinking. How about this?” They support each other to come up with solutions and persevere to see those solutions through. Kaʻiʻiʻini describes, “We’re willing to share, we’re willing to try things, and we’re willing to go and then jump full face in and try it out.” Pulelehua states, “I don’t think we would allow us to fail.”

They also support each other in working through challenges with the extended faculty they work with and keep things in perspective for each other. Participants in the natural group describe the importance of trust as they work with other teachers as a “united front” of Kaʻiʻe Loa. Pulelehua said, “It’s the idea that what we say here, stays here.” When they breakout to work with teachers separately, the message is consistent to what the whole group feels and believes in. Makamaka describes an in-service day Kaʻiʻe Loa was in charge of planning and implementing, “I felt totally comfortable and I trusted the group that they were highly professional.” This belief in each other fosters the care each member has for others in the group and their contributions (Myers, 2014). The relationships Kaʻiʻe Loa members have with the larger Middle School community came from the members building trust amongst them as well.
Kānana credits that, “We’ve been around long enough to earn some type of credibility with our peers which helps. They can trust us.”

*High Levels of Respect*

Trust and respect are closely tied and many of the comments noted above run through this characteristic of respect too. In reviewing the results of the *Teams That Work* assessment tool, there are 89% of members who feel input from team members are sought when decisions are made that will affect the team. Eighty-nine percent also feel that members of Ka ‘Ike Loa have a high regard for each other’s talents and skills. Also, 89% of them feel that team members are fully engaged with each other when they are together. In debriefing the assessment tool results the team discussed how they do feel their voices are heard within Ka ‘Ike Loa and that their input is taken and acted upon (see Table 5).

Table 5.

*Teams That Work Assessment Tool: High Levels of Respect*

<table>
<thead>
<tr>
<th>Statement</th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input from team members is sought when decisions are made that affect the team.*</td>
<td>78%</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Members of our team have a high regard for each other’s talent and skills. Team members are fully engaged with each other when they are together.</td>
<td>78%</td>
<td>11%</td>
<td>0%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>67%</td>
<td>22%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

Ka ‘Ike Loa’s ability to get work done in the areas of curriculum, instruction, and assessment at KSKMS capitalizes on their technical skills and competence (Myers, 2014). The
diversity of the group and open conversations within the group allow for the sharing of ideas. Ka‘i‘ini describes a specific example when she was sharing her lack of interest in a lesson with two peers from two different content areas.

At least you can informally talk with colleagues and randomly get input that you wouldn’t necessarily get on a day-to-day basis. I think that is definitely helpful, just being able to talk about whatever, even though we have an agenda. Just the small things that come up in conversation that are helpful to getting where you need to go in your day-to-day curriculum in the classroom.

She also describes Ka ‘Ike Loa as, “The community we built within ourselves…as a safe place.”

Keao shares how, “It’s important that you feel comfortable with all members on the table so you can openly share the hard stuff and you can enjoy the funny stuff.” Even with the addition of new members in the 2013-14 school year, Makamaka talks about how, “They seem to just effortlessly slide right in. We already bonded together, getting to know each other.”

**Commitment to a Clear and Common Purpose**

Ka ‘Ike Loa members have a buy in to the work the group does and this is evident in their commitment to the clear and common purpose of the group (Myers, 2014). Ka‘i‘ini discusses this;

I think the buy in is huge. Whether you want to be there and do the work, I think that has a huge effect on the synergy. Everyone is 110% into the work that we do, get’s excited and rejuvenated by the work we do and the conversations we have.

Members of Ka ‘Ike Loa invest time with each other helping to dialogue and implement different initiatives that are happening at the organizational and KSKMS level. The work of the
group is aligned to the passion and personal purpose of each member of Ka ‘Ike Loa. Keao elaborates on this, “When it comes down to it, we are going to pull our weight. We are going to do what we are supposed to do and then it makes a difference when everybody is involved.” She goes on to say, “We’re the group that figure out how we can help deliver it to everyone else.” Makamaka describes this as Ka ‘Ike Loa, “Thinking about what we are going to do and we brainstorm and go in different directions.”

As work within the group progresses members are committed to taking the steps needed to make changes. They take time to ensure that everyone is on the same page and there is a common agreement before moving forward. Pulelehua expands on this, “Every moment along the way, we know the purpose at that moment. So as the goal and vision are changing, we know exactly what our goal was at that moment in time.” Makamaka describes, “In my mind, as a group, we all are committed and passionate about the purpose.” The commitment to this purpose is so strong that Makamaka states, “This is my legacy, when I leave you.”

Even as Ka ‘Ike Loa is confronted with changes or adversity the movement as a group is fluid. The commitment of each group member is clear and all member actions are supportive in moving this work forward. Kānana said, “We are all common, our brain waves. When we got to go right, we go right, when we got to go left, we go left. We’re all in it together.” Kaʻiʻiʻini talks about the last minute huddles Ka ‘Ike Loa does, “We are aware and are tying the ends together. I may need a quick check in or someone else may need one. We’re on the same page. We’re all good!” The members of Ka ‘Ike Loa are supportive of each other, which further assists in meeting the changes or adversities the group faces. Makamaka describes this as, “I think people check their personalities at the door. I don’t feel I get judged. I feel like everyone is supportive.” Pulelehua said, “We do what we have to do as a team to get it accomplished.” Makamaka
supports, “We are committed to the group goal, to whatever task that we have and making sure we do a quality job too.”

In the interviews, the participants were asked what they saw to be the common purpose of Ka ‘Ike Loa. Eighty-nine percent of the group identified that our team’s purpose is clear and that team member’s priorities are aligned to the team’s purpose according to the *Teams That Work* assessment tool (see Table 6). There is awareness by all group members of where they are, what the target is, and then they work together to come up with a way to get there.

Table 6.

*Teams That Work Assessment Tool: Commitment to a Clear and Common Purpose*

<table>
<thead>
<tr>
<th>Team member’s priorities align with the team’s purpose.*</th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56%</td>
<td>33%</td>
<td>0%</td>
<td>11%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

The summary of what members of the group identified as the purpose of Ka ‘Ike Loa included two components; one of personal growth and one of improving the practice of teachers at KSKMS. Keao explains the origins of the group as those,

Who are willing to do the standards and that eventually you go and work with your content area and you help them understand. It’s like baby steps. I would say that we’re the early adapters with things dealing with curriculum. We are the nucleus that we’re the core and we hash it through, we talk about it, the pilot group of early adapters. This is coming down the pipe, what do you think? How are others going to respond to it? How can we ease this transition?
Makamaka shares her impression of the group’s purpose,

Trying to help the teachers in the classroom with bigger, institution and campus-wide initiatives and make meaning out of the grand initiative down into how they can apply it in their own classrooms. Really trying to get them to a place where we are moving to a standards-based kula Hawai‘i, which for me was huge coming to Kamehameha and what I left behind.

Makamaka goes on to share how the work within the group then transfers to what they do with the larger faculty. “We reiterate why things happen or how things connect and fall into place. We make sure everyone is okay with understanding the direction we’re going in and what needs to get done.” As Ka ‘Ike Loa moves from planning to executing their goals Pulelehua describes, “The work involved in that process is what matters and the work is going to be consistent, necessary, appropriate, and worthwhile. She goes on to say, “We are speaking the same language so when each of us are asked what’s going on, we’re all saying the same thing.”

Pulelehua describes Ka ‘Ike Loa’s work with teachers as a process,

I know that even at the end of the year, if we don’t get to where we we’re going to get, it’s going to be okay because a process has occurred today till then that has moved us in a different direction that is moving us forward more importantly than would have been to get a task done. Progress in process in of itself is good enough. And the rest will happen when it happens, we are still moving, the bus is going forward.

Keao elaborates, “This is a process and we are going. This is the time for us to give each other feedback, like here is my work, it’s not exemplary, I’m still working on it just as you are.”

Ka‘i‘ini describes the work with the larger faculty community,
Not a five-year initiative, the focus is improving your practice which you always have to do if you want to grow and evolve as a teacher. The improving practice is in your face. Somebody is doing something and we want to stop and see what he or she is doing. I’m hoping everybody will start to see those things and that will feed the momentum and make it doable and sustainable.

*Willingness and Ability to Manage Conflict*

Ka ‘Ike Loa members are able to ask each other difficult questions and address the issues presented to them (Myers, 2014). In the *Teams That Work* assessment tool, 89% of the group members agreed that team members are able to openly share after a conflict. Ka ‘Ike Loa members see what they are doing as part of a learning process (see Table 7). The group sees failures as being okay and a learning experience on how improvements can be made in the future. Makamaka describes this as, “Some of the things we do may not work with the teachers but failure is okay because no matter what, even with failure and the setbacks, there’s always lessons to be learned and improvements.” This mindset Ka ‘Ike Loa has while looking at challenges and set backs is fostered by the reflective practice of the group. Pulelehua explains this, “I think we reflect a lot as a group and I think that helps us to problem solve issues as they come and then we can adapt easily.”

Eighty-nine percent of Ka ‘Ike Loa members also feel that team members do not talk behind each other’s backs (see Table 7). The conversations within the group are open and with high levels of trust, they know what is said within the group will not go beyond the group. This group has very critical conversations, which as Pulelehua describes,
What we say here, stays here. We will say things, very blatant or honest to get a point across and I don’t ever feel like any of it goes anywhere but here. And I think a big part of what you feel safe to ask. Hard questions about each other, when we’re trying to work with our teams and we have a hard time. We’re able to ask each other and help each other at the time.

Keao further elaborates,

We never come to a point where we have to critique each other or give critical feedback to a point where we take offense or anything. We always all know that any kind of feedback is for the betterment of whatever product we’re working for. We do ask difficult questions, like calling it on the table, I think whatever it’s asking why did that change or how come we’re moving to such or whatever. We are truthful to each other, no sugar coating here.

Table 7.

*Teams That Work Assessment Tool: Willingness and Ability to Manage Conflict*

<table>
<thead>
<tr>
<th></th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team members share openly after conflict.*</td>
<td>56%</td>
<td>33%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Team members do not talk behind each other’s backs.</td>
<td>44%</td>
<td>44%</td>
<td>0%</td>
<td>11%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

Ka ‘Ike Loa members do not just agree with each other in everything they do. The group is very open and willing to work through and manage conflicts together. Ka‘i‘ini describes this,
I think there is division sometimes where, I mean not everybody will agree. So we say, okay, let’s check in. I feel the same way. It may be like, I’m feeling a little uncomfortable and so we either say okay or should we pause? Or it’s what we do to support you now, to bring you to a comfortable place. We can come to consensus.

Part of the management for Ka ‘Ike Loa members stems from their role at KSKMS to take larger organization-wide or campus-wide initiatives to a malleable and consumable level for the faculty. They represent the teacher voice at KSKMS. This means Ka ‘Ike Loa figures how these outside KSKMS influences make sense for those within KSKMS so they can be sure there will be positive impacts to teaching and learning. Makamaka describes, “Where there is an initiative or other kinds of direction coming from outside our group, we help to not be such a challenge and mitigate the challenge.”

Much of the time Ka ‘Ike Loa spends managing conflict extends to their work with the larger faculty within KSKMS. Ka‘i‘ini said, “Growth in addressing conflict whether it’s within our team or with the others teams we work with.” The ongoing relationships that Ka ‘Ike Loa members are working to build with the teacher groups they are serving helps them to be able to speak more openly and honestly. Although a challenge, members are inspired to continue to do the work. Ka‘i‘ini explains the challenge,

Not everyone is on board, so in terms of faculty, the Ka ‘Ike Loa people are on board and ready to lead the charge, but we need everyone on the faculty to participate with us. They are all in different places in terms of how much energy they have to put into the different things we want to work on. Not all of them necessarily see the value in it, some of them may just not care, I mean they’re just in a place where they don’t have the time and energy.
Makamaka also identifies, “Our colleagues could be barriers. Some people, that for whatever reason are highly negative, overly sensitive, and they’re not in a mindset where they’re willing and open to change.” The work Ka ‘Ike Loa has done has helped the group in earning credibility with their peers.

In order to address these types of challenges Ka ‘Ike Loa members use strategies that not only helps them in building their own capacity, but also helps them in managing their work with their peers. Ka‘i‘ini shares the necessity of having, “Active listening making sure rephrasing to understand where the person’s coming from.” Ka ‘Ike Loa members talk about the group planning and how they incorporate the viewpoint of their fellow teacher at that time. Pulelehua elaborates,

   We start thinking of worse case scenarios like are things going to go over well with us or in groups. What are some things they might see and needs people might have. We’re trying to overcome obstacles before the obstacle is in front of our face. We even start to think about negative things that they may see when we are presenting so that we’re mentally prepared.

Makamaka shares, “We really do try to anticipate all questions. We try to think about it from different perspectives.”

Since the 2012-13 school year, Ka ‘Ike Loa members have assisted in the responsibility of planning for and implementing faculty in-services. This has required the group to be able to manage conflict, on the spot, no matter if the group prepared for the scenario or not. During an in-service day called, Drop it Like it’s Hot, Keao describes how Ka ‘Ike Loa had to work with, “People complaining about not having their computer. When I heard the grumbling, I remember saying to somebody, we’re learning through this too.”
Ka ‘Ike Loa spends much of their time planning how they could motivate their peers. Ka‘i‘ini describes this, “How do we get the slugs to join the party? Like what- how do we figure out how to strike a cord in people who are really negative and don’t want to spend the time.” Ka ‘Ike Loa members are dedicated to the work they are doing and as Kekoapono describes it, “The relationships developed into one that is rewarding and open. It is a good thing.” Keao shares about her work with her peers as, “A way to have critical conversations and be okay with that, and still leave laughing, and not feeling offended or attached.” She goes on to say, “We’re starting to bring our team together which for many years would be separate.”

As Pulelehua said, “Because we all get along” the work within Ka ‘Ike Loa has impact to the relationships and curricular work happening with the larger faculty at KSKMS. Keao accentuates the growth mindset of the group as, “We are going to keep moving forward.”

**Focus on Results**

Ka ‘Ike Loa members measure their achievement and outcomes as it relates to their purpose (Myers, 2014). Eighty-nine percent of the group members feel the team achieves the results agreed upon by the group. Eighty-nine percent of them also agree that team members are committed to achieving team goals (see Table 8).
Table 8.

*Teams That Work Assessment Tool: Focus on Results*

<table>
<thead>
<tr>
<th></th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our team achieves the agreed upon results.</td>
<td>78%</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Team members are committed to achieving goals.*</td>
<td>78%</td>
<td>11%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

The group is task oriented and them wanting to do good work reinforce this. Pulelehua describes this as, “We are very task oriented so things get done. So it’s a productive group.”

Makamaka elaborates on how the work of Ka ‘Ike Loa is tied to a timeline, a point where group members are working with the whole faculty or groups of faculty members,

It’s tied to some sort of timeline so we have to get it done in a timely manner; like it’s tied to a faculty meeting or it’s tied to an in-service day. So we have some accountability there, like we have to do it by a certain time.

Kai‘i‘ni adds about Ka ‘Ike Loa as a task oriented team by saying, “There is a good balance between meeting a schedule and effectiveness.” Makamaka explains, “There has to be a commitment to do it to a certain level of quality, and the follow through part, I think is important.”

The creation process is what fuels the focus on results as there is a complete investment by each group member to get the work done. Ka‘i‘ini explains the creation process as, “Anything we create, any documents we’ve created, and conversations we had, everything just builds and we definitely see that same thing as we collaborate with our own teams.” Pulelehua describes the creation process as, “We can make it our own way and then we begin to create. Once we start
to create, it becomes ownership and it becomes mine and becomes ours.” She goes on to say, “All you can focus on are the tangibles, and so you are pressured to produce results.”

The creation process includes a lot of discussion and brainstorming and then there is a point where the group stops and starts to capture and organize ideas. Ka‘i‘ini describes this as, “We have to accomplish something and there is an agenda and we are going to work together to get to a certain point. I think it is very helpful trying to lead and move people forward.” Pulelehua adds, “Then we say okay, we need to get this on paper. So let’s get it done and all of a sudden, we get done in an hour.”

As Ka ‘Ike Loa does long term planning, the development of an overall process has been critical in order to assure that they are able to support and honor where all content area groups are within the process. Feasibility and manageability are taken into consideration as different groups work through the curricular development process created and managed by the group. Ka‘i‘ini describes this in detail,

Some of our tasks, long term, short term, we’ve taken into consideration the fact that everybody is at different places on the path and we are a little bit flexible. Like for example, there was a discussion about what our long-term goal is going to be by the end of the school year. We went around the room and shared where we were all at, and there was agreement based on where everybody was and what was feasible at the end of the school year.

Makamaka adds, “There is huge consideration, I think, for what is feasible, manageable, and then we create a process based on that.”
Alignment of Authority and Accountability

Overall the results through the use of the Teams That Work assessment tool were positive, showing the high performance of this group as a team. In this area, 100% of Ka ‘Ike Loa said that team members hold themselves accountable for the results (see Table 9). This deep connection was discussed during the debrief and the group shared due to the small size of Ka ‘Ike Loa, it becomes critical that each person pulls their weight. They explained the impact is great when one person does not do what is needed for the team. They also discussed the deliberate attention given to rationale when working with the larger faculty as they want to be sure their peers understand why we are doing what we are doing, but also want to make sure the professional development they are planning is worth other’s time. Each group member shared the responsibility and accountability to the overall group and all the work they do.

Table 9.

Teams That Work Assessment Tool: Alignment of Authority and Accountability

<table>
<thead>
<tr>
<th></th>
<th>Most Favorable</th>
<th>Favorable</th>
<th>Neutral</th>
<th>Less Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team members hold themselves accountable for results.*</td>
<td>78%</td>
<td>22%</td>
<td>0%</td>
<td>0%</td>
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</tr>
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*Statements with an asterisk are stated in the negative in the online assessment but are stated in the positive in the report to allow for intuitive/easier interpretation.

Members of Ka ‘Ike Loa have a shared commitment to the work that they are doing and they know what they are accountable for and why they are accountable for it. When the group first organized, the principal made it clear regarding the expectations of the group. Pulelehua explains this responsibility,

We were asked, what would work with teachers? We took a 44-page document, which we knew would not work and trimmed. It became ours and then once that was done, we
were given the authority to share with the faculty as this is what we’re going to do. So it was work that was valued because there was meaning to it and it was carried on beyond what we did. So we were given the audience and the venue to share. The admin supported and told teachers this is what we were going to do. It’s like when you do a lot of hard work then you get validated for that work. Then it spreads and becomes something that now everybody understand. It’s not just our little group’s understanding anymore and that starts to feed the drive to want to keep doing this work. This is good work.

Since inception, Ka ‘Ike Loa members were always in the front of all curricular and instructional change at KSKMS, which has made them, as Pulelehua calls, “the guinea pigs,” of the campus. She goes on to say, “If there is a good practice then we are going to do it first.” They have a collective understanding that they are all in this together.

They also see a relationship to their work with organizational initiatives as they help to manage the initiatives at a system-level, which has helped to bridge understanding for all teachers. They see their responsibility to this as making sense of the initiatives at a teacher level. Kānana said,

The teachers cried out that we keep getting these things come in, and whatever it is, like initiatives that come in, and they leave the next year or they don’t do it. They were not hashed out before presenting it to the faculty. So one thing we do, maybe unconsciously, is we hash it out. I mean we literally dissect it, and we put together something that our co-workers can understand and receive.

This focus of the group has shifted over the years and now also includes the members of the group to facilitate curricular conversations within their content area. Keao shares how this works,
I’ll go to my own content area, so my performance, my objective when I go back to my team is to get such and such task done. Now, that’s my directive. And it is aligned with this team’s progress. Because while that is a separate team, like I’m just as much a part of that team, now it’s like I’m part of this team, so I have to understand how to work as a team member in whole.

Makamaka said,

Whatever initiatives caught between or in the way, we make sure that we do it very well. We work it out effectively and make sure it’s productive. We make sure that people understand it. We are very deliberate in making sure people understand the rationale and everything. We hold ourselves accountable and I think our peers are holding us accountable as well.

Pulelehua describes this shift over the years as a, “Path and its not the path that we thought we were on in the beginning but it’s definitely where we need to be. It comes from a little faith, I think, and trust, that it’s going to work out.”

Ka’i’ini describes the defined expectations of the group as, “We have a chance to connect with colleagues professionally our practice and improving practice then trying new things and how can we structure professional development so that we’re all improving our practice.”

Pulelehua describes the group’s expectations as, “Making decisions that are going to impact the school in a positive way and then communicate that to the rest of the faculty and supporting them in their understanding of what the curriculum is.” Makamaka said, “I like the fact that we try to look at what teachers are already doing and help them evolve to the next steps.”
There are mechanisms in place to assist and support the work of Ka ‘Ike Loa. “We have that once a month check in and keep working on things that do not just improve our own practice but improve the practice of the whole faculty” Ka‘i‘ini said. Ka‘i‘ini goes on to say,

With our set-up (open space) things are not just on the bookshelf, it is in your face. Somebody is doing something and we want to stop and see what they are doing. We are able to model and help feed the momentum and make our work doable and sustainable.

Makamaka elaborates on how the support of group members helps the overall purpose of the group, “I think the support part is important because if you’re not supporting the group members then you are not supporting the end goal.” Pulelehua said, “We are like a support group, really. We have, especially things this year and the year before.”

The supportive nature of the group is essential to the personal motivation and investment of each member. Pulelehua said, “All the things Ka ‘Ike Loa is doing now are truly meaningful. I wouldn’t have done it by myself. I would have petered out.” Ka‘i‘ini also describes, “There is no way one of us could have signed up on our own and carried out this work.”

Ka ‘Ike Loa has a high level of mutual accountability and it is not that only one member carries the weight and only a few contribute, everyone carries their weight. Members know their role within the group and with each member carrying out that role they are able to support each other and the overall purpose of Ka ‘Ike Loa. No matter how big or small the role, it is viewed by the group as important. Makamaka states, “When we say we are going to do something, every individual does it.” Keao describes this,

I mean we’re not like a very huge group, yet when we do in-services days, it is somewhat involved. So if one person doesn’t pull their weight, then it really will look bad in front of all our peers. So you’re not just talking about coming up as like, “Oh, sorry guys, I didn’t
make whatever. I didn’t do my part.” So I think that’s why when you say you are going to do something, then you better do it because it’s going to have an impact on the larger faculty community. There is a greater impact, beyond. So you need to do what you’re saying you’re going to do because if not, your area will look like it is behind.

Pulelehua adds to this,

It’s like everybody jumps in or helps. It’s okay, no worries, I got it. It’s not only are you responsible for your own kuleana (responsibility) but you feel you’re responsible for the group’s kuleana should something go wrong. So that’s something I think I’m comfortable with. Even if it still happens, I know that there are six other people that are going to rally to get it and figure it out.

As the group prepares to do work with the larger faculty there is much planning and preparation that goes into it. It begins with the conversations as Ka‘i‘ini shares, “Conversations we have builds everything and we definitely see the same thing as we collaborate within our own teams.” Makamaka describes how the group, “Continues to make sure that everybody is okay with understanding the direction that we’re going in and what needs to get done to get the place we want to be.” Pulelehua explains the work of Ka ‘Ike Loa as,

We reflect upon how we presented our communication before and after contact with faculty. I think we are meaningful to help us identify what didn’t work and what did work. I think they now view us as 1) they are not going away, 2) they’re taking us in a direction, even though it’s more work, it is meaningful.

The group members speak from a common voice as they all were a part of developing the direction they are taking the work.
Makamaka also describes how during implementation, “It cannot be carried out by one or two people to train for a whole day. So there has to be a willingness to want to pitch in and divide the work load.” Pulelehua shares how the overall implementation of Ka ‘Ike Loa’s work with the faculty has been a process, “Five years into this, I know that even at the end of the year, if we don’t get to where we want to get, it’s okay. A process has occurred from today till then that has moved us in a different direction that is moving us forward which is more important than getting a task done.”

Pulelehua talk about the group’s dynamic, “I think what works is that we are accountable to each other. I don’t think we judge.” Keao said, “We understand the importance of accountability. So you know with this group you are going to get to stay on top of things. You can walk away and know that you don’t have to remind people of stuff because next meeting, they’re going to come and there’s something going to be done.”

Synergy

The members of Ka ‘Ike Loa described their experiences when they felt synergy within the group. This included how members were all contributing to help pull together pieces of their work that they could not have done themselves. They described the energy they felt during these moments and how the work seemed to flow and fall in place. They also discussed how diversity and change has contributed to the group and the way they work together.

As Ka ‘Ike Loa works together there is a high level of dependability on individuals contribution to the group’s work. Keao describes, “We could depend on each other that when I pass it over, they are going to do their part.” Pulelehua shares, “The buy-in to the whole team thing, that every little thing that everybody does makes a difference and everything people don’t
do makes a difference and affects other people.” “When it comes down to it, they are going to pull their weight, they are going to do what they’re supposed to do and then it makes a difference when everybody is involved” Keao elaborates.

No matter how big or small a person’s contribution, Pulelehua describes, “If it’s a small part, that doesn’t devalue that fact that it’s important and that I can determine that teeny tiny part that I have.” Makamaka states, “We are committed to do it to a certain level of quality, and the follow through is important.”

In order for the dependability to be present a support system must also be in place. Makamaka shares about the professional development work of Ka ‘Ike Loa, “I felt supported, in that moment, we supported each other.” She goes on to say, “I think the support part is important because if you’re not supporting group members then you are not supporting the end goal.” Ka‘i‘ini describes support as the group’s, “Constant communication and venue to bounce those ideas off of. There is a time that is carved out for that purpose.” Keao supports, “Everyone was involved and everyone was into it.”

As Ka ‘Ike Loa members describe synergy they begin to create a picture of what it is means to them as a group. Makamaka described it as “Interacting together, establishing system’s thinking, you can see the individual pieces but some pieces helping it together to see that it’s part of the big picture and how they are all interrelated.” Makamaka elaborates, “It’s connectedness, relationships definitely. A broad system knowing there’s pieces within that come together, the foundation, you are learning from other people.”

It was reiterated over and over by the participants how the work that is being done within the group could not be done by an individual and a much more rich product comes out with the group. Makamaka said,
I have an idea and we talk through it. It becomes something even more valuable than anything I could have done by myself. So that’s really powerful…The synergy, the working together, it was amazing the amount of ideas that came out of our conversations and collaborations. Definitely couldn’t have come up with it by myself.

In another interview she states, “The product really could not have been created with just one or two people in the room. It had to have been everyone contributing.” Ka‘i‘ini supports, “There is no way one of us could have signed up on our own and carried out the work. I don’t know how I would have crafted anything on my own.” Pulelehua stated, “All the things we are doing now that truly make Ka ‘Ike Loa meaningful, I wouldn’t have done myself. I would have petered out by now.”

Kānana describes Ka ‘Ike Loa’s work, “We hash it out. I mean we literally dissect it and we put it together into something that we know our coworkers can understand and achieve.” Pulelehua supports, “It’s the planning. It’s the huddle with a small group of people to plan for what’s going to happen. The conversations we have in the group gets us all thinking about synergy of working together. What’s going to make sense to everybody else.”

Kekoapono shares it metaphorically via her artifact,

Not that it’s fragmented so much as there are so many different parts to it. It doesn’t necessarily all fit together in one solid mass and it shouldn’t. There’s something that can hold it together but on any given day, it could be arranged in different fashions but it still all comes together. It’s beautiful.

This is now a natural part of the group, “I think every time we get together it’s normal. It’s not like, wooh we’re synergizing, I think it’s just what we do” said Pulelehua. In another interviews she adds, “I think it works for us, when we’re very synergistic, it is all brains on deck
all at once, not on the same thing.” Kaʻiʻini describes, “The community we built within ourselves (Ka ʻIke Loa), we’re willing to share, we’re willing to try new things, we’re willing to jump full face in and try it out.”

Many participants also share the feelings they have when in synergy. Makamaka said, “It’s a positive energy, I think that goes around when we meet together. We don’t have lulls, we just kick in. The energy is really positive.” Keao explains the feeling,

When you’re working with the right people and you feel comfortable to allow yourself to flow and even give feedback, you’re open to feedback because you know that you’re both heading into the same place. You’re not worried that the person is criticizing you because that person also wants the process to succeed.

Kaʻiʻini describes,

Everybody in the group is brought into what we’re doing and is super excited about it so there’s constant energy. We can bounce off each other to keep momentum going. So it’s four hours of mostly positive energy time where you don’t have the one who drags along because they don’t want to be there. At least we feel the fire to keep going.

Keao describes the flow of Ka ʻIke Loa, “It’s culture. All that we do is an expression of culture so there is a way to bring two things together. When things just start to flow and happen culturally, you have to let it run its course.” Kaʻiʻini’s description of flow is, “Even though we have four hours once a month, sometimes I feel like we need more time.”

Kekoapono talks about the need for synergy in education today,

I started thinking about how nowadays your cannot just go into a classroom and be by yourself. There are so many different parts of what is means to be a good educator and Ka ʻIke Loa is kind of like that. It’s always trying to help us see new parts of our
curriculum and ourselves. Helping everything come together to help the students achieve and be better people. This is how Ka ‘Ike Loa helps all of us.

“Teams are living, breathing organisms. They are not static. They will never die” Pulelehua said. The change within the group and diversity of the group adds to this “living, breathing organism.” Ka ‘Ike Loa is organized with teachers, “Having the time and space where there’s random grouping of people and then we have random impromptu conversations” said Ka‘i‘ini.

Ka‘i‘ini describes, “The energy was amazing and everybody around you loving education and teaching and it was worth something. It was the best thing ever and people valued it.” This validation contributes to the feeling of the group. Makamaka said, “There is validation going on when it’s well-received (by teachers).” Pulelehua adds,

I think that is all part of the connection that we are comfortable here and therefore we do good work here. Therefore it carries out as good work out there. Therefore you have the validation to come back and want to do more. I think if there was one or the other, it wouldn’t be the same. I believe they are connected.

Innovation

Ka ‘Ike Loa members shared how part of the drive of the group lies in their design and creation of curriculum resources and processes in moving teaching and learning forward at KSKMS. Their understanding of the teachers they work with serves as the foundation for this innovation. “It’s trying to take what people are doing and try to take it to the next level in preparing students for the 21st century and having the skill sets that they’ll need when they get
out of high school and beyond” states Makamaka. Keao adds, “We are breaking down the walls of traditional teaching and traditional ways of being a professional teacher.”

This understanding assists with Ka ‘Ike Loa’s innovation as a solution-oriented group. Makamaka said, “We are trying to problem solve and kind of strategized, and really what we’re doing is impacting kids, that is the bottom line.” Keao shares, “We are going to figure out how to make it happen, we’re here to figure it out, we all come here knowing that we’re a group that is going to figure out how to do this.”

The ownership and again value of Ka ‘Ike Loa’s work is reaffirmed through innovation. Ka‘i‘ini said, “Anything we create, any documents we created, and conversations we had, everything just builds and we definitely see the same thing as we collaborate within our own teams.” Pulelehua affirms, “Once we started to create, it became ownership and it’s because it’s mines and it’s ours.”

This innovation and creation environment requires all members to be engaged and the share their ideas. Pulelehua describes Ka ‘Ike Loa as,

We work well, all of us our in our own little place and we throw it on the table. Then we look at the ideas and rummage through the pile. We decide, let’s put this to that and this will work. Some thing we chuck, saying we can’t use this for this time.

Ka ‘Ike Loa perseveres through their problem solving, Ka‘i‘ini describes what this process looks like for Ka ‘Ike Loa,

I think that building on top of each other. We do a lot of that, bouncing ideas back and forth on the table. It’s huge in our planning. When we get stuck, sometimes we take a break and come back. We’re not getting anywhere. We’re not ready to chuck it but we
can’t seem to figure it out right now, so we’ll come back to it. That is okay, that is the
process. I think that is huge also solving whatever it is we’re stuck on at the time.
Pulelehua describes it as, “We have the courage to try things you would not normally try and test
it out.”

As different solutions are explored, there is a trial and error, learning from the failure and
tweaking based on those learning. Makamaka said, “In this group, even when there’s something
that failed, I mean didn’t go well, the group does not feel like we failed, it is used as a stepping
stone.” Failure is understood as part of the innovation as Ka ‘Ike Loa works to design and
problem solve. Makamaka goes on to say,

I know that in my position that some of things we do may not work with the teachers, but
failure is okay because no matter what the failure and setback there are always lessons to
be learned and improvements to be made.

In order for the perseverance and iteration to happen, it requires a reflective environment
for Ka ‘Ike Loa. Makamaka describes it as, “The whole reflection, the whole pause, you learn
something, you’re like constantly reflecting on how to improve.” Pulelehua adds, “We have to
do continual updates.”

**Motivation**

The members of Ka ‘Ike Loa view learning as an evolutionary experience where they
need to continue to evolve in order to meet the needs of the students in their classrooms. Ka‘i‘ini
describes this evolution, “As long as you are moving, as long as you are improving in some way,
with something, that is what’s important. We are focused on the learning and your own learning
and growth. Being supportive of one another.” Keao adds, “If you don’t change, it you don’t
improve, the system will die. So if you don’t want to change, then…” Ka ‘Ike Loa members soak up learning to do more through applying the learning.

The members of Ka ‘Ike Loa see their work as something that needs to be done in order to become better teachers and in the end impact learning to create better students. Keao describes this, “We are adapting and trying to get better at what we are doing. We are not only improving our practice, but we’re helping students, which is why we are all here.” In another interview Keao shares, “It is my professional practice to become better because of my involvement with Ka ‘Ike Loa.” Kānana explains, “I see myself as a sponge, which really helped me navigate what I needed to do to accomplish whatever I wanted to.” Keao further elaborates, “We are surrounding ourselves with people that we can enjoy and getting work done, which I think we all clearly value.”

Much of what Ka ‘Ike Loa members shared was how the work of the group is aligned to their personal passions. Making what they are doing within the group, even though it is added work to what they already do, valuable. Ka‘i‘ini describes the group as, “My outlet. They are people who still have the drive and passion. I have a chance to connect with colleagues professionally about out practice and improving practice.” Ka‘i‘ini also shared her decision to become a member of the group as, “My entire body came back and said yes, like the gut decision after thinking a little bit more.” Kekoapono said, “Do you know that we like to do this work. It is important to be with the people who like to do the same thing.” Makamaka elaborates, “It’s inspiring to work with people that work hard and play harder. So I think we celebrate together. We work hard together. We know that we can empathize with each other and our problems.”

Although there is a component of Ka ‘Ike Loa members as instructional teacher leaders to their peers, they connect closely with this work and the improvement it has in their own
classroom. Keao said, “In doing this work, I compare it to my own teaching strategies or what I am doing in my own curriculum. As teachers, we are taking it to the next level.” She goes on to describe some of the areas that KaʻIke Loa members have been early adapters and shares, “Eventually, when others are ready, they will come aboard. But I think by that time everybody will be on board and we will be already going to the next thing.” Kaʻiʻini shares,

Even though we do a lot of formal, heavy lifting, I don’t ever feel exhausted coming out of these meetings. I feel more rejuvenated like we could have just worked three hours on something difficult. We try to weave things back and forth somehow and this helps to keep things lighter, not so heavy and difficult.

The energy within KaʻIke Loa is sustained by all members. Keao explains,

I think it is the people in the group, it’s not a committee where you are dragging. You go there and we talk through things in preparation to help support everyone else and then the people in the group make it fun. You come and you’re happy to break away from whatever else that you were doing. Even though other would wonder why are you happy to go there?

Pulelehua describes this energy,

I think because the people that are part of the group have helped make it a functioning positive experience. When we have fun and we get along well, we are task-oriented at the same time so things get done. It’s a productive group. I feel like when we’re there, we get things accomplished.

Kaʻiʻini description is, “We all come here, we are happy and we are all willing to crank out the work. We come prepared.” Makamaka shares, “It’s a good thing that we are highly successful in what we do because I think for me, that’s part of the motivation for continuing to do it. It’s like
there’s a huge validation outside and I see rewards.” Ka ‘Ike Loa members are motivated by each other and the teachers they work with.

Summary

The Teams That Work framework, participants’ interpretation and experience that are synergistic, innovation, and motivation were the areas focused on to further understand this teacher leader group, Ka ‘Ike Loa. These findings surfaced as I honed in on the Teams That Work characteristics and synergy, but others such as innovation and motivation emerged through conversations with participants. Interviews with each of the participants extended my initial theoretical framework in ways that deepened my understanding of the group. Summarizing the hours and pages of interviews seemed like a daunting task, but after spending time with the participant’s words, they began to weave together the picture of the ingredients needed for team success and influence.
CHAPTER 5
DISCUSSION AND FINDINGS

Introduction

Teams are an integral part of any organization, and a team’s ability to learn and adapt to their environment and others is key to an organization’s success. The purpose of this study was to examine the synergy within the teacher instructional leader group, Ka ‘Ike Loa. Six members of Ka ‘Ike Loa were interviewed to gain their perspectives. A qualitative approach was used to discover the experiences that foster synergy within Ka ‘Ike Loa.

The review of the related literature in Chapter 2 detailed background research about the characteristics identified in the Teams That Work framework, synergy, team dynamics, motivation, and innovation, which are the foundation for the purpose of the study. Chapter 3 of this research is the methods chapter, which highlighted the overall design of the research. A description of the population used in the study, details on how data was collected, as well as the coding structure used throughout analysis is described are included. The results were analyzed in Chapter 4 and are organized by themes of the Teams That Work framework, synergy, motivation, and innovation.

Summary of the Study

To gain a better understanding about the experiences that foster synergy within Ka ‘Ike Loa, the following research questions guided this study:

1. What are the experiences that foster synergy within Ka ‘Ike Loa?
2. What is synergy as defined by Ka ‘Ike Loa?
The questions were developed in an effort to gain a better understanding of the characteristics of this self-directed group of instructional teacher leaders and identify ways these characteristics can be used in creating other successful teams at Kamehameha Schools and abroad.

For the purpose of this study, synergy is referred to as multiple characteristics of the group, that when combined, create a greater effect than the sum of their individual effects. The participants within this study helped to further define synergy of teacher leaders. Ka ‘Ike Loa serves as a group whose dynamics encourage deep reflection and serve as a sounding board for curricular, instructional, and assessment change at KSKMS. They have worked to develop a culture committed to building the collective capacity of the entire KSKMS faculty. They have built an environment based on interdependence, shared responsibility, and mutual accountability for all faculty (DuFour & Marzano, 2011). Therefore, for the purpose of this study, Ka ‘Ike Loa was considered an instructional teacher leadership group that functions through synergy.

When I reviewed the literature there was a scarcity of research addressing synergy within groups. However, literature existed on the characteristics of highly effective teams and team dynamics. Drawing from the literature within and outside the areas of education and an analysis of the experiences shared by Ka ‘Ike Loa members assisted in understanding the ingredients needed to foster synergy within a group.

This study used qualitative methods to gather and frame the response from research participants. The participants were six members of Ka ‘Ike Loa who are all faculty at KSKMS. All participants were members of the group for over one year. The data were collected through a series of semi-structured interviews with each participant. The data were then analyzed and presented thematically around the Teams That Work framework, participants’ interpretation and experience that are synergistic, and the areas of innovation and motivation. I relied on the
theoretical lens of the *Teams That Work* framework to encourage the participants to share their perspective and experiences about synergy within Ka ‘Ike Loa.

The data collection process included a challenge in being able to schedule the second interview with two of the participants. Although several attempts were made, both via email and face-to-face, we were not able to confirm an individual meeting time. Both of these participants did participate in completing the *Teams That Work* assessment and the natural group interview.

Also included in the *Teams That Work* assessment were two new members of Ka ‘Ike Loa, who joined the group in Fall 2013. I decided to include these members in the assessment as the tool’s use is going to be used beyond the scope of this research of Ka ‘Ike Loa. The *Teams That Work* assessment has been used within KSKMS for three years prior to Ka ‘Ike Loa’s use in Fall 2013. All Ka ‘Ike Loa members, including the two not involved in the study, were invited to the natural group interview since the group interview included a debrief of the team’s results from the *Teams That Work* assessment. One of the two new members was able to join this dialogue and one did not. This new member stayed for the duration of the natural group interview and although she gave consent to be a part of the research, her contributions to discussion were not included in the analysis of data in Chapter 4.

**Findings**

The main idea presented in this dissertation and substantiated with literature and data from interviews is the synergy of groups to improve and innovate. I attempted to understand the experiences that foster synergy in order to find ways those characteristics could be translated to other groups in order for their organizations to thrive. Each participant shared their experiences and understandings of Ka ‘Ike Loa.
Many participants spoke of their experiences within Ka ‘Ike Loa in comparison to previous or current groups in which they work. With the sharing of artifacts at the beginning of the first interview each member shared who they were as they began their journey as a teacher to who they are now as an instructional teacher leader within Ka ‘Ike Loa. Many of these artifacts were connected to mentors who groomed them, giving them the support and resources for success. Each interview provided another way for me to deepen my understanding of individuals within Ka ‘Ike Loa, the group, and the dynamics that foster their success as a group.

Each participant was and continues to be a member of Ka ‘Ike Loa; their stories and descriptors have a distinct connection. They described the feelings, sounds, and energy of the group. They acknowledged the contribution of the group to themselves, each other, and the KSKMS school community. The participants assisted in creating the pictures that derived from the research questions, “What are the experiences that foster synergy within Ka ‘Ike Loa?” The participants extended the definition of synergy as they explained their experiences. As the data branches off from the original Teams That Work theoretical framework and synergy, it became apparent that other ways of looking at this research were needed. Three new strands – team dynamics, innovation, and motivation – were identified and woven throughout the interviews. Each strand provided insight that deepened the understanding of synergy within the group. Although synergy was used to describe how the pieces created something greater than they could have individually, team dynamics explored the mindset and practices needed in order to team as a verb (Edmondson, 2012). Innovation became a pivotal idea through the research, as the opportunity for participants to innovate was part of how synergy was fostered within the group. As group members shared their passion to the work of the group motivation became a revelation that strengthened understanding of Ka ‘Ike Loa.
**Fostering Synergy**

Three characteristics of synergy – environment, people, and passion – emerged in this study after thoughtful analysis of the participant interviews that I then connected back to the literature in the field. Following, I describe how through my observations and through participant input, I am more convinced that synergy, when working with a team, is necessary in order for the team to surpass what they could do on their own or what they could do as a working group, as suggested by Wageman (2008). Additionally, Robinson’s (2009) statement that “…there’s a big difference between a great team and committee” (p. 126) supports my conclusion that a group working in synergy not only behooves the organization the group is a part of, but each member of the group as it increases their individual capacity. I have the same commitment that Edmondson (2012) describes when she stated, “The organization that will truly excel in the future will be the organization that discovers how to tap people’s commitment and capacity to learn at all levels in an organization” (p. 22). It is through this lens that I describe the characteristics I found.

The literature and interviews closely tied the six characteristics of the *Teams That Work* framework to synergy. Each characteristic is an equally necessary part to having synergy within a group. Having the right conditions for growth allows people to grow in synergy with the people around them and the environment they create (Robinson, 2009). A group develops through collaboration when the members of the group see themselves as a collective force that together can achieve the important work they are doing. This is work that the individual members would not be able to accomplish on their own (Garmston & Wellman, 2008). The work is not simple and will usually stretch people to limits that are difficult but worthwhile (Csikszentmihalyi,
1990). Four of the group members stated elements of this collective force through statements such as “We hash it out; we are trying to problem solve and strategize; we have the courage to try things you would not normally try or test out; and as long as you are moving, as long as you are improving in some way, with something, that is what’s important.” These statements all contribute to what Edmondson (2012) described as the ultimate goal for any organization, which is to create an environment that is always learning, always improving, and always excelling. Furthermore, the statements are an example of Edmondson’s (2012) cyclical operating process where “…team members engage in the cycles, surface and integrate their differential knowledge, and find ways to effectively use the new collective knowledge to improve organizational routines” (p. 50).

Like Wageman (2008), I consider the creation of teams an important and thoughtful endeavor. The thoughtfulness should extend to each member who must equally contribute to upholding the six characteristics. Each member does what is needed, pulling their weight, which is a critical part of the research and data collection. The differing skill sets of group members contribute to the collaborative process and engage members to problem solve as they access different information (Edmondson, 2012). Three of the participants spoke to the need for everyone to do their part, “Every little thing that everybody does makes a difference and everything people don’t do makes a difference. They are going to pull their weight. We are committed to do it to a certain level of quality, and the follow through is important.” This supports Koestler (1989) notion that, “The evolution of ideas is a tale of ever-repeated differentiation, specialization, and reintegration on a higher level: a progression from primordial unity through variety and more complex patterns of unity-in-variety” (p. 226).
Additionally, the data from my research supports Bennis & Biederman’s (1997) who when describing a team and its transforming nature with synergy, stated that

…the are places of action, not think tanks or retreat centers devoted solely to the generation of ideas. They make things- amazing, original things… The thing being made has many uses within the group. It incarnates the dream, but it is something real, distinct from the people who are creating it, yet shaped by their hands. The thing, the task is what brings the group together and keeps it grounded and focused (p. 214-215).

In returning to the two major research questions of the study, and considering how the data connected to the literature, I identified the following characteristics of synergy as a result of my analysis of participants who are members of Ka ‘Ike Loa and I suggest these characteristics are needed to nurture synergy within any group of people. The characteristics are environment, people, and passion as seen in Figure 1. Specifically, I state it as environment fosters synergy, people foster synergy, and passion fosters synergy.
Society has entered into a new generation; a knowledge economy and teams are the principle means organizations get work done (Edmondson, 2012; Pink, 2011). It is a necessity for organizations to create an environment where teams work in synergy to foster improvement and innovation. An organization thrives in an environment where people feel safe to take risks and are expected to follow high standards and pursue challenging goals (Edmondson, 2012). Bennis and Biederman (1997) stated, “The organizations of the future will increasingly depend on the creativity of their members to survive. The leaders need to find ways to retain their
talented and independent-minded staff and to set them free to do their best, most imaginative work” (p. 8).

At a very practical level, the responsibility of an organization is to create the environment needed for the organization to thrive and learn. Edmondson (2012) advocated that, “Organizing to learn is a way of leading that encourages critical teaming behaviors to promote collective learning. It supports that collaboration is needed to solicit employees’ knowledge, apply it to new situations or challenges, and to analyze outcomes” (p. 26). Ka ‘Ike Loa was set up as part of an initiative to adopt standards at an organizational level. At the school level this work was supported and valued with time that was provided to the group every month. Participants shared the supports and Ka’i’ini best describes it,

Ka ‘Ike Loa has these once a month check ins. We work on things that we can do not only to improve our own practice but improve the practice of the whole faculty. There is a structure for doing the work Ka ‘Ike Loa does and because leadership sees value in the work. Time and structure are given, that’s really helpful. It keeps me wanting to do the Ka ‘Ike Loa work because I am passionate about improving practice and learning new tools. We have the support to try new things. Myers’ (2014) work reinforced that it is natural for people to want to do good work and it is up to the organization to create an environment that allows this to foster.

A fundamental challenge in a school environment is improving professional practice. To improve in this area Dufour & Marzano (2011) suggested the focus must be on developing the capacity of educators to become more effective, and Edmondson (2012) recommended creating an environment that encourages people to learn as they go. The focus on capacity and environment promotes the idea that there is no one way of learning that is the best way to get
work done. Feedback is critical and essential (Brown, 2009; Edmondson, 2012; Moussavi-Bock, 2013), creating opportunities for learning and reflection on what worked and did not work. Edmondson (2012) said, “Managers who operate with the assumption that change is constant and novelty is everywhere are more likely to get the most out of the failure that invariably will occur” (p. 167-168). Shifting the focus of failure to a learning experience encourages creativity and creativity inevitably requires taking tasks (Bennis & Biederman, 1997). Examples of learning from continuous feedback and failure were present during many of the interviews. Specifically, the concept of learning through failure was central in Makamaka’s second interview where she shared, “I know that in my position that some of the things we do may not work with the teachers but failure is okay because no matter what, even with failure and the setbacks, there’s always lessons to be learned and improvement.”

Dufour & Marzano (2011) recommended organizations embrace the concept of defined autonomy, a common framework of non-negotiable goals for teaching and learning. Teachers and teams are given the responsibility and authority to determine how they will meet those goals. Makamaka described the defined autonomy of Ka ‘Ike Loa, “In some of our tasks, long term, short term, we take into consideration the fact that everybody is at different places of the path. There was agreement based on where everybody was and what was feasible.” This statement contributes to what Dufour and Marzano (2011) described, “Establishing clear purpose, priorities, and parameters that allow people to be creative and autonomous within clearly established boundaries” (p. 204).

A frame and a clear vision give teams the ability to recognize the best practices for them to meet their target. The environment encourages the team to look at these best practices as a means for them to improve and resources are provided to assist the group in making informed
decisions (Edmondson, 2012; Dufour & Marzano, 2011). Synergy is fostered in this environment as the leader is setting direction rather than giving a prescribed way to do work, allowing the people within a team to find those answers. The environment helps them to be active thinkers who are engaged and bought into the work of the school or organization (Edmondson, 2012). Edmondson (2012) suggested that, “Knowing where one sits on this spectrum helps frame the learning challenge as one of improvement, problem solving and risk reduction, or innovation” (p. 229). Four members of Ka ‘Ike Loa shared the environment of the group, “It was work that was valued because there was meaning to it and it was carried beyond what we did. We were given an audience and a venue to share. Administration supports the fact that the work is valued and important. I know what the expectations are. The fact that we are supporting administration.” The team works collaboratively and uses each other as a sounding board as they problem solve helping them discover new and better ways to do things (Edmondson, 2012).

People Foster Synergy

Society has moved from the Industrial Age to the Information Age and is now transitioning to the Conceptual Age, a knowledge economy where focus is on the heart. The transition shifts society from information and knowledge to people and their hearts, which is rewarding. Society has moved from a focus on products to a focus on engagement. People in the Conceptual Age must be creators and empathizers, pattern makers and meaning makers (Pink, 2006). Pink (2006) suggested that as people work together they need to have, “The ability to marshal these relationships into a whole whose magnificence exceeds the sum of its parts” (p. 141). Three group members supported this engagement of people in their interviews. Pulelehua shared, “All of the things we are doing now that are truly Ka ‘Ike Loa are meaningful, I wouldn’t
have done by myself. I would have petered out by now.” Ka‘i‘ini expanded, “Without the structure and support and initiatives of Ka ‘Ike Loa, I probably wouldn’t have had a chance to try and even lead conversations with the content area I work with.” Makamaka added, “I think I’m able to have richer conversations.” Engagement supports Bennis & Biederman’s (1997) indication about people needing to be intrinsically motivated, connected, and sustained by the joy of problem solving. Two participants echoed this, “It’s important to be with the people who like to do the same kind of thing. We are trying to problem solve and strategize.”

Members of a group are as Bennis & Biederman (1997) stated, “The people who can achieve something truly unprecedented have more enormous talent and intelligence. They have original minds. They see things differently. They have a knack for discovering interesting, important problems as well as skills in solving them” (p. 198). Two members of Ka `Ike Loa described this connection, “One idea would spark another idea. Anything we create, any documents we created, any conversations we had, everything just builds and we definitely see the same thing as we collaborate.” Bennis & Biederman (1997) said, “They are engaged in a process of discovery that is it’s own reward. They have hungry, urgent minds” (p. 17). Pulelehua shared this sense of reward in connection to other groups she works with, “I think I’ve always felt really good things on this team, more than any other team I’ve been on for sure.”

The characteristics identified in the Teams That Work framework are essential to the success of a team and their ability to work in synergy. The literature connected with the characteristics, maintains teams need to rely on members within the team, engage in critical conversations through dialogue and feedback, and are accountable to a common goal (Edmondson, 2012; Myers, 2014). The people within the team motivate each other and can have a transformative affect on a person’s sense of identity and sense of purpose (Edmondson, 2012;
Robinson, 2009). Makamaka described this as, “It’s a positive energy that goes around when we meet together.” “We are surrounding ourselves with people that we can enjoy and get work done” Keao added. Working as a team builds the collective capacity of its members, creating a collaborative culture based on interdependence, shared responsibility, and mutual accountability (Dufour & Marzano, 2011). Edmondson (2012) stated, “People must be able to shift from one situation to another while maintaining high levels of communication and tight coordination” (p. 24). Three members of the group stated how the collective capacity is strengthened,

   Everybody jumps in to help. It’s not only you are responsible for your own things, but you feel you’re responsible for the group’s things. It’s inspiring to work with people that work hard and play and eat harder. We celebrate together. We work hard together. We know that we can empathize with other and our problems are solved together. We come to the meeting knowing that whatever is going to be announced or brought to our plate, we’re going to figure out how to make it happen.

Bennis & Biederman (1997) described the effects people have on synergy as, “Projects require the coordinated contributions of many talented people…one person can’t accomplish it, no matter how gifted or energetic he or she may be. There are simply too many problems to be identified and solved, too many connections to be made” (p. 2). Pulelehua comments supported the people notion when she said, “We were tasked with the same thing but we were not thinking the same thing. We started typing because we couldn’t keep it all and things worked.” She goes on to say, “So I think we worked when all of us are on our own little plane and we threw it on the table. And then we look at the ideas and rummage through the pile.” Ka‘i‘ini added, “We do a lot of that, it bounces back and forth on the table. It’s huge in our planning.”
Empathy is essential as a team works together to create and design new things. When designing, the members of the team put themselves in the position of the fellow teachers they service. Empathy requires this attention and attachment and is a part of Ka ‘Ike Loa’s working style. Self-awareness is built and relationships are forged (Pink, 2009). Ka‘i‘ini affirmed the need for empathy as Ka ‘Ike Loa plans, “We have all experienced poorly led professional development that’s a waste of your time. We’re aiming not to provide that experience.”

The literature and interviews closely tied what Bennis & Biederman (1997) advocated, that people in teams, who work in synergy, often have a lot of fun. Ka ‘Ike Loa works together closely and intensely and in this charged atmosphere, members of the group see much more of each other than many of their colleagues. Additionally, Pink (2009) offered that, “Laughing people are more creative people. They are more productive people. People who laugh together can work together” (p. 204). Three of the group members stated elements of fun and laughter,

We make those off the wall comments and jokes, and laugh, and then come back and go back to where we were and focus. It’s not drudgery and it’s not a place where I feel is a waste of time. We weren’t playing or relaxing as much and we still have actual fun. We weave in and out of story, laughing, and we get back on path.

Passion Fosters Synergy

The interviews revealed the concept that passion fosters synergy in both process and content, which was a cogent way in which to make sense of this part of the findings. What follows is not a simple definition of synergy, but the feelings that are evoked when members of Ka ‘Ike Loa are in a synergistic state as a team. The participants expressed their feelings, the
impact it has had on them personally, and the work they do with others as a responsibility to the team.

The work of the group comes with ease as it relates to individuals’ passion and is connected to their personal interests. Bennis & Biederman (1997) emphasized that individuals’ passion are fed and people feel like they are doing what they were born to do. Passion and learning being fed by members of Ka ‘Ike Loa came up in both the individual and natural group interview for two members,

My whole entire body came back and said yes, like a gut decision. It was totally what I wanted it to be, personally and professionally. I think the very reason why all of us are here, is the nerdy, nerd alert, we all crave some level of nerdiness. We learn something new on a regular basis. I have been reflecting on all the bits and pieces and seeing how it naturally ties and fits in.

The literature and interviews connected what interviewees described as the ease of the work and how time quickly time passed by was described. Ka‘i‘ini described this, “So it’s four hours of mostly positive energy time where you don’t have the one you have to drag along because they don’t want to be there.” This statement contributes to Csikszentmihalyi (1990) definition of flow, “The state in which people are so involved in an activity that nothing else seems to matter; the experience itself is so enjoyable that people will do it even at great cost, for the sheer sake of doing it” (p. 4). In this state people come up with ideas quicker and individuals are tapping a source that makes achieving a task significantly easier. A person feels a sense of relaxation and what that individual is doing is natural (Robinson, 2009).

When greater demands are placed on people they seem to do things a bit greater than usual, they give more than they usually would (Goleman, 2005). Robinson (2009) stated,
“There’s a real sense of ideas flowing through you and out of you; that you’re in some way channeling these things. You’re being an instrument of them rather than being obstructive of them or struggling to reach them” (p. 91). Csikszentmihalyi (1990) elaborated on struggle and challenge,

These periods of struggling to overcome challenges are what people find to be the most enjoyable times of their lives. Their person cannot help but to grow into a complex being. By stretching skills, by reaching toward higher challenges, such a person becomes an increasingly extraordinary individual (p. 6).

A person is able to achieve mastery of any skill or body of knowledge naturally in a flow model (Achor, 2010). In the second interview, each of the participants shared what being a member of Ka ‘Ike Loa has done for them that would not have happened if they were not a part of the group. Each of them were able to share, being an early adapter, taking advantages of strategies that would have floundered, deepening their understanding of standards, curriculum, and instruction. Their responses showed the passion they have for this work. This supports what Csikszentmihalyi (1990) called optimal experience, which adds up to a sense of mastery. Optimal experience is achieved based on an individual’s effort and creativity. As an individual is in deep work they are so involved that they lose awareness of worries and frustrations and they exercise a sense of control over their actions. Additionally Goleman (2005) elaborated on flow and mastery in his statement,

People in flow exhibit a mastery control of what they are doing, their responses perfectly attuned to the changing demands of the task. And although people perform at their peak while in flow, they are unconcerned with how they are doing, with thoughts of success or failure- the sheer pleasure of the act itself is what motivates them (p. 91).
Pulelehua described this sense of control and fulfillment as, “I don’t feel like I’ve been drained here. I’m not getting my energy sucked by people here.”

The concept of happiness and its relation to the group’s work was shared during the interviews. As defined by Achor (2010), “Happiness is the joy you feel striving to your potential” (p. 40) and is relative to a person and their experiences. This supports the joy the group members described and is links the literature and interviews. Two members of the group talked about how happiness motivates and moves the group, “We come and you’re happy to break away from whatever else that you were just doing. When we all come here, we are happy, we are willing to crank out the work.” These statements contribute Achor’s (2010) description that, “cultivating positive brain makes us more motivated, efficient, resilient, creative, and productive, which drives performance upward” (p. 4).

Members of Ka ‘Ike Loa are aware of what Robinson (2009) described as the natural aptitudes and personal passions, people need to develop. The development ensures individual’s growth and fulfillment. Makamaka described, “I can visually set my mind to do whatever I need to do,” and as a person is working in the area of their passion and in flow, they are highly motivated and in a mild state of ecstasy and intense concentration (Goleman, 2005).

Limitations

The study is limited by the participants who are all members of the group Ka ‘Ike Loa. An purposive sampling was used as this was a group of special interest to me as the researcher. I wanted to look at the good practices of Ka ‘Ike Loa in order to better understand their synergy. Each of the participants knows me and this contributed to their willingness to participate in the research. Participants appeared to be relaxed and comfortable during the interviews. The analysis
was concentrated on the members of Ka ‘Ike Loa and their perspective to the work they do at KSKMS only.

I would like to point out that this study did not ask others in the KSKMS community their interpretations of Ka ‘Ike Loa and their impact to teaching and learning on our campus. The perspectives shared in this research are those shared in the interviews of participants and generalizations made by myself, as a practitioner researcher, who has worked with the group and the KSKMS community for over five years.

Implications

From this study of an instructional teacher leader group, I posit that a focus on synergy is a highly effective way to foster teaming. The experiences that the participants described where they felt synergy in their work, showed the ingredients that need to be present in order for this to happen within a team. In essence, the six characteristics identified by the Effectiveness Institute’s Teams That Work framework must be present and strong in order for a team to be in synergy. The Teams That Work model can serve as a productive framework for organizations to spend time moving groups from working groups to teams through deep social connection as organizations that learn.

Although the data indicated that participants interviewed in this study did not have a set protocol to follow as they developed themselves as a group, their answers illustrated the need to have an intentional and purposeful plan on how to foster synergy within groups. The participants referred to other groups they work with throughout their responses. The data shows that the participants are a resource to impact how an effective team can work together to affect change in an organization. Ka ‘Ike Loa will continue to use and strengthen their relationship using the
Teams That Work assessment results as a foundation for future conversations. The group has worked together for over five years and will continue to work together in the future. It is critical for Ka ‘Ike Loa to continue to pay attention to how they synergize. Further use of the Teams That Work assessment should be used as preliminary areas for further action were identified during the assessment debrief during the natural group interview. It may even benefit the group to take time to review this research with the assessment data to provide opportunities to spread the synergy of this group to other groups within KSKMS. The knowledge and skills the group has learned about teaming and synergy can translate into other groups they are a part of at both KSKMS and Kamehameha Schools as an organization. The positive impact to the future of Kamehameha Schools if the institution transitioned to an organization that learns is endless.

I combined qualitative research methods in ways that brought meaning to the phenomenon of being in Ka ‘Ike Loa. In particular, the analysis method included started with the identification of relevant responses from the interview aligned with the Teams That Work framework. A targeted analysis approach of the transcripts and proved to be fruitful to supporting the Teams That Work framework while highlighting additional themes that rose from the data. The focus on the Teams That Work characteristics, synergy, innovation, and motivation describe the ingredients needed to develop effective teaming.

Future Research

As noted in the findings, the environment of a team is critical to synergy and can either hinder or foster teaming. Ka ‘Ike Loa and their work within KSKMS is the focus of this particular research. Further research could be done on how to make shifts at an enterprise level to an organization that learns. Through my research and data collection the environment set by the
organization is a garden that can truly help nurture synergy. Looking at ways to manage this type of organizational shifts is critical as a large enterprise is looking to change. It will create an environment where people share knowledge, they learn to ask questions clearly and frequently, and they make adjustments through which their skills and knowledge are woven together to help drive the organization’s overall vision. The organization will continue to grow and excel in their industry with an environment that promotes collective learning. Synergy is fostered, helping any industry, not just education, to move forward and innovate through the people who work for them.

In the first interview, while asking each of the participants to share their artifact of who they were as a first year teacher, four of the six participants shared stories of mentors who have a positive impact on their beginning years of being a teacher. Expanding to the existing research regarding beginning teachers and mentoring is an area of future research. Looking at the relationship of having a strong mentor for support in teaching and teacher leadership may have an impact to the long-term effectiveness of teachers and their role as teacher leaders within education. The participants had a common experience and this was an interesting common denominator that could be further explored. Knowing more about this relationship would assist educational institutions to be attentive, from teachers’ early years, to create an environment that would have positive, long-term effects for the institution in the future.

I was attentive to a depth of teaming that is not always considered in a Western, traditional work setting. A shift from teams being put together to cooperate in order to meet the organization’s goal to a team that is dynamic through coordinated and collaborative structures that are constantly shifting to meet the needs of the ever-changing work environment is necessary. A shift from routine and predictability where individuals are bound by rules and
procedures to innovation and problems solving where individuals are motivated and engaged is necessary. A deeper connection to work must be cultivated in an organization’s environment and the cultural connection to this depth is an area where extended research could continue. Looking at this group from a Hawaiian lens and how the cultural piece of Kamehameha Schools as an organization contributes to the group’s synergy. The way Hawaiian and other indigenous cultures worked together could give insight to their sustainability and systems thinking way of managing community, contributing to the work setting and synergy.

Conclusion

The purpose of this study was to examine the experiences that foster synergy and identifying those characteristics within the teacher leader group Ka ‘Ike Loa. I sought to discover the traits within the group that have enabled success and explored the barriers the group experienced and how they worked to overcome them. From this study, I had hoped to identify and analyze the characteristics of Ka ‘Ike Loa to help develop teams at KSKMS, Kamehameha Schools, and abroad. The broad themes of environment, people, and passion emerged.

As a practitioner researcher and a member of Ka ‘Ike Loa, I know first hand the successes and challenges the group has encountered and how they worked to capitalize and overcome them. The data showed the emotional involvement and personal investment the participants had to the work of Ka ‘Ike Loa and the impact they have to KSKMS as a whole. All of the participants referred to the accomplishments of the group with a sense of pride, of being part of something bigger than they could have done on their own.

One of the most important things I personally took away from this study was the level of expertise and attention of each member of Ka ‘Ike Loa. They are passionate about their work and
their overall impact to the direction KSKMS is heading. I identified there is a need for more synergy and attention to cultivating a culture of organizing to learn. As educators’ time is stretched, this attention provides mechanisms for success within an organization. The data showed these are instructional teacher leaders who care deeply about the success of their students, the success of the teachers they serve, and are willing to do what is needed to cultivate synergy for the overall good of KSKMS.

The voices of the six participant members of Ka ‘Ike Loa weave the threads of synergy as identified in this research. These threads are an effective way for an organization, whether in the area of education or not, to approach teaming through synergy. All threads – environment, people, and passion – are necessary for a team’s success. An innovative environment inspires people as they work together, enhancing their ability to understand themselves and each other to problem solve (Pink, 2006).

E lawe i ke a‘o a mālama, a e ‘oi mau ka na‘auao - Take what you learned and apply it and your wisdom will increase (Pukui, 1983). The ‘ōlelo no‘eau, Hawaiian proverb, closes this research best. I was given no choice when it came to this research, it was asked of me through my participation with Ka ‘Ike Loa. Having experienced synergy with Ka ‘Ike Loa, knowing how synergy feels, and the positive impacts synergy has made, it was my responsibility to dig deeper and share. It was my opportunity to share the story of Ka ‘Ike Loa explaining their context and giving meaning to their work (Brown, 2009). They are an exemplar of how teaming is the engine of organizational leadership, changing the culture of a school (Edmondson, 2012). The participants have changed my way of working within a team as I strive to identify and contribute to the ingredients that exist for Ka ‘Ike Loa. The participants have changed my leadership as I make every effort to create an environment that fosters synergy for teams. This research is my
contribution to how we, at Kamehameha Schools Kapālama Middle School, can continue to learn, grow, and innovate.
APPENDIX A

HUMAN STUDIES PROGRAM APPROVAL

May 28, 2013

TO: Erika Cravalho
    Principal Investigator
    College of Education

FROM: Denise A. Lin-Deshetler, MPH, MA
    Director

Re: CHS #21251 - “The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher
    Leader Community”

This letter is your record of the Human Studies Program approval of this study as exempt.

On May 28, 2013, the University of Hawai’i (UH) Human Studies Program approved this study as
exempt from federal regulations pertaining to the protection of human research participants. The
authority for the exemption applicable to your study is documented in the Code of Federal Regulations
at 45 CFR 46.101(b) (2).

Exempt studies are subject to the ethical principles articulated in The Belmont Report, found at

Exempt studies do not require regular continuing review by the Human Studies Program. However, if
you propose to modify your study, you must receive approval from the Human Studies Program prior to
implementing any changes. You can submit your proposed changes via email at uhirb@hawaii.edu. (The
subject line should read: Exempt Study Modification.) The Human Studies Program may review the
exempt status at that time and request an application for approval as non-exempt research.

In order to protect the confidentiality of research participants, we encourage you to destroy private
information which can be linked to the identities of individuals as soon as it is reasonable to do so.
Signed consent forms, as applicable to your study, should be maintained for at least the duration of your
project.

This approval does not expire. However, please notify the Human Studies Program when your study is
complete. Upon notification, we will close our files pertaining to your study.

If you have any questions relating to the protection of human research participants, please contact the
Human Studies Program at 956-5007 or uhirb@hawaii.edu. We wish you success in carrying out your
research project.
APPENDIX B
CONSENT TO PARTICIPATE IN RESEARCH PROJECT

Consent to Participate in Research Project:

The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher Leader Community

My name is Erika Cravalho. I am a graduate student at the University of Hawai‘i at Mānoa (UH) in the Department of Education. As part of the requirements for earning my graduate degree, I am doing a research project. The purpose of my current research project is to describe the experiences that foster synergy within Ka ‘Ike Loa. In this research project, synergy is referred to as multiple elements that when combined create a greater effect than the sum of their individual effects. The participants within this study will help to further define synergy of teacher leaders. My purpose in conducting this study is to identify the characteristics of this team in order to replicate it within Kamehameha Schools and larger educational community.

Activities and Time Commitment: If you participate in this project, I will meet with you in a series of interviews. This will include two individual interviews that will take approximately 1-2 hours, depending on your response to the open ended questions. You will also need to take the Teams That Work: Team Assessment, which includes 30 questions, which should take you approximately 15 minutes to complete. The purpose of this assessment will be to stimulate discussion amongst the group and will have during a focus conversation upon completion of both sets of interviews. The focus group conversation will include all Ka ‘Ike Loa members together and will take approximately 1-2 hours depending on how much is shared in response to the assessment results and open ended questions.

You will be audiotaped recorded as a part of your participation in this research study. These recordings will be listened to myself to transcribe, code, and analyze the data collected for the study. The audiotaped recordings and transcriptions will be stored in a password-protected file on an encrypted external hard drive. You are able to be a part of this study if you choose not to be audiotaped. If recordings of you are used in any context, anonymity will be maintained. No identifying information (such as full names) will be used. Upon completion of the study I will destroy the audiotapes.

Benefits and Risks: The direct benefit to you in participating in my research project will be identifying the characteristics of synergy within Ka ‘Ike Loa as an instructional teacher leader group. These experiences will help to replicate this group in other parts of Kamehameha Schools.
and the education community as a whole. I believe there is little or no risk to you in participating in this project. If, however, you are uncomfortable with any of the interview questions, you can skip the question, or take a break, or stop the questionnaire, or withdraw from the project altogether.

Confidentiality and Privacy: During this research project, I will keep all data from the questionnaire in a secure location. Only I will have access to the data, although legally authorized agencies, including the University of Hawai‘i Committee on Human Studies Program, have the right to review research records.

When I report the results of my research project, and in my typed transcripts, I will not use your name or any other personally identifying information. Upon the completion of each of the individual interviews I will share the interview transcripts with you to ensure what you shared is accurate. You will have the option to omit any part of this interview upon this review. All the information contained in my report will be shared with you at a briefing held prior to the submission of a final report. If you would like a copy of our final report, please contact me at the numbers listed near the end of this consent form.

Voluntary Participation: Participation in this research project is voluntary. You can choose freely to participate or not to participate. In addition, at any point during this project, you can withdraw your permission without penalty.

Questions: If you have any questions about your rights as a research participant, in this project, you can contact the University of Hawai‘i, Committee on Human Studies Program (CHS), by phone at (808) 956-5007 or by e-mail at uhirb@hawaii.edu.

If you have any questions about this project, please contact the researchers via phone:

Erika Cravalho (808) 348-6290

Please keep the prior portion of this consent form for your records.
If you agree to participate in this project, please sign the following signature portion of this consent form and return it to Erika Cravalho.
Signature(s) for Consent:

I agree to participate in the research project entitled, “The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher Leader Community.” I understand that I can change my mind about participating in this project, at any time, by notifying the researcher(s).

___ Please initial if you are willing to have this interview recorded on audiotape. You may still participate in this study if you are not willing to have the interview recorded.

Your Name (Print): __________________________________________

Your Signature: __________________________________________

Date: __________________________________________
APPENDIX C

INDIVIDUAL INTERVIEW #1 PROTOCOL

Individual Interview #1
The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher Leader Community

Pre-Interview
I will ask each participant to prepare two artifacts to share with me prior to our time together. These artifacts will be used to start the interview, by having the participant reflect on their life as a first year teacher to being a part of this instructional teacher leader group. These symbols and stories will be used to identify the experiences within Ka ‘Ike Loa.

Instructions for Participants (to be given them to them at least one week before the date of the gathering/event): Participants should come prepared with two objects: one object will represent the participant at the beginning of their career as a teacher and the other object will represent the participant as a member and instructional teacher leader within Ka ‘Ike Loa.

Interview Protocol
• Share purpose
  o To get to know more about you as an individual and your journey into becoming an instructional teacher leader.
• I will share my two artifacts
• Participant shares their two artifacts
• Interview Questions

Introduction
Good morning/afternoon/evening. As you know, my name is Erika Cravalho and I am pursuing my EdD at the University of Hawai‘i at Mānoa. Today’s session is part of the research I am conducting. We’ll be talking about your individual journey as a teacher today. If at any time you want to skip a question or feel uncomfortable, please know that you can choose to not answer the question. You can also choose to withdraw from the study at any time. It will not impact our work in Ka ‘Ike Loa in any way.
Please be as honest and truthful as possible, remembering again that is confidential and all answers will be kept anonymous.
Thank you again for your participation in the study. Do you have any questions before we begin?

Artifact Sharing
We will begin today with the artifact sharing I asked you to prepare prior to our interview. I will begin by sharing my artifacts related to my first moments as a teacher as well as myself as an educator today.

Interview Questions
• Explain any relationship you see between these artifacts and your work with Ka ‘Ike Loa.
• What is your educational background as it relates to teaching?
• Describe your teaching roles from your first teaching position till today?
  o Include schools/organization, dates, age taught, etc.
• Share a rewarding experience you have had working with a fellow teacher.

**Closing**
Thank you again for talking with me today? Is there anything about yourself that I did not ask and you would like to share?
APPENDIX D

INDIVIDUAL INTERVIEW #2 PROTOCOL

Individual Interview #2
The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher Leader Community

Interview Protocol
- Share purpose
  - To identify the synergy of Ka ‘Ike Loa
  - To identify how Ka ‘Ike Loa has been successful
  - To identify the challenges Ka ‘Ike Loa has overcome,
  - To identify the effect Ka ‘Ike Loa has had at KSKMS.

- Interview Questions

Introduction
Good morning/afternoon/evening. As you know, my name is Erika Cravalho and I am pursuing my EdD at the University of Hawai‘i at Mānoa. Today’s session is part of the research I am conducting. We’ll be talking about your perspective in relation to Ka ‘Ike Loa. If at any time you want to skip a question or feel uncomfortable, please know that you can choose to not answer the question. You can also choose to withdraw from the study at any time. It will not impact our work in Ka ‘Ike Loa in any way. Please be as honest and truthful as possible, remembering again that is confidential and all answers will be kept anonymous. Thank you again for your participation in the study. Do you have any questions before we begin?

Interview Questions
- How did you become a member of Ka ‘Ike Loa?
- What keeps you as a member of Ka ‘Ike Loa?
- What are the two main tasks of Ka ‘Ike Loa?
- What are the supports that make Ka ‘Ike Loa work?
- What are the barriers that get in the way of Ka ‘Ike Loa?
- Describe the moment you felt the most synergy as a member of Ka ‘Ike Loa?
- What have you done as a member of Ka ‘Ike Loa that you couldn’t do on your own?
- What do you think can be done to increase synergy within Ka ‘Ike Loa?
- What advise would you give others who are working together in a group similar to Ka ‘Ike Loa?

Closing
Thank you again for talking with me today. Is there anything about yourself that I did not ask and you would like to share?
APPENDIX E

NATURAL GROUP INTERVIEW PROTOCOL

Natural Group Interview
The Synergy of Teacher Leaders: Identifying the Characteristics of a Teacher Leader Community

Pre-Interview
An email will be sent to all Ka ‘Ike Loa members advising them of the Effectiveness Institute’s Teams That Work (TTW) assessment tool being emailed to them. This will be 30 questions that should take 15 minutes to complete.

Email sent by Insight Consulting. They will then retrieve the data from the group to prepare for the debrief.

Interview Protocol
• Share purpose
  o To debrief the TTW assessment tool
  o To synthesize the previous interviews and ask questions as a whole group
• Insight consulting will debrief the results of the TTW assessment tool (1:15 min)
• Interview Questions (45 min)

Introduction
Good afternoon. As you know, my name is Erika Cravalho and I am pursuing my EdD at the University of Hawai‘i at Mānoa. Today’s session is part of the research I am conducting. We’ll be debriefing our groups results of the Teams That Work assessment sent to you a couple of weeks ago. As a reminder, this assessment was initiated through my research and although I will be using it for my dissertation, we will continue to use this information beyond my research further develop our group in the future. I will also be asking the group a few questions, based off of the previous interviews, in order for me to find out more about the synergy of this group. If at any time you want to skip a question or feel uncomfortable, please know that you can choose to not answer the question. You can also choose to withdraw from the study at any time. It will not impact our work in Ka ‘Ike Loa in any way.
Please be as honest and truthful as possible, remembering again that is confidential and all answers will be kept anonymous.
Thank you again for your participation in the study. Do you have any questions before we begin?

Teams That Work Debrief
Insight Consulting will go through a debriefing session based on the TTW assessment tool results. This session will be formatted to look at all six characteristics and spend time discussing the top two and bottom two of each.

Interview Questions
• How are you inspired by the people within Ka ‘Ike Loa?
• How has Ka ‘Ike Loa added value to who you are as a teacher?
• This group consists of a diverse group of educators (different subjects, different educational backgrounds, varied teaching experiences, etc.). How has this group found connection and relationship in our work? (Daniel Pink - symphony)
  ○ Has this diversity been an advantage?
• In this interviews many of you talked about our work designing as a group (rainbow-curricular connections, Drop it Like it’s Hot). You folks described how these were times Ka ‘Ike Loa brought disparate things together and developed a solution. How did Ka ‘Ike Loa navigate its way through the design process during these time? Include what worked and what didn’t work and how we handled the ups and down.
• Story and laughter do play a role in this group as discussed in many of the interviews. Explain the impact you feel this has on the group?

Closing
Thank you again for talking with me today. Is there anything I did not ask that you want like to share?
APPENDIX F

TEAMS THAT WORK ASSESSMENT TOOL

Ka 'Ike Loa
Teams That Work
Team Report
Ka 'Ike Loa

11/10/2013

Note: All named team members are listed regardless of completing the Teams That Work Assessment.
TABLE OF CONTENTS

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» High Level of Respect  8
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» Willingness and Ability to Manage Conflict  10
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Teams That Work Introduction

The Teams That Work Assessment is a tool for teams to use to assess the current level of team performance. The results from this 30 statement assessment will report the presence of (or lack of) the six characteristics identified as essential to high performing teams. Teams will be able to examine where they are and where they want to be.

The Assessment is purposefully designed to stimulate discussion to positively impact the future success of the team.

How Data is Presented

All of the statements for each characteristic are reported on a single page. On each page, there are 5 scales, each representing a different statement about the characteristic.

Color Code for Responses

- Weak
- Weak
- Neutral
- Favorable
- Unfavorable

Team Member Ranking Summary

The Team Member Ranking Summary report provides a summary of the team members’ responses to each statement by ranking them Favorable (green), Neutral (yellow) or Unfavorable (red). For ease of interpretation, a Favorable, or green, ranking combines both dark green and light green responses, and an Unfavorable, or red, ranking combines both orange and red responses.
Characteristic Averages

The Characteristic Averages displays the team’s averaged scores for each characteristic on a line graph and numeric grid. An Overall Health Index is also provided for possible future comparison.
Teams That Work Characteristics

1. High Level of Trust
2. High Level of Respect
3. Commitment to a Clear and Common Purpose
4. Willingness and Ability to Manage Conflict
5. Focus on Results
6. Alignment of Authority and Accountability
High Level of Trust

1. Members of our team do what they say they will do.

2. Team members accept responsibility for each other when they are not together.

3. Members of our team genuinely care about each other.

4. Members of our team work well with each other.

---

Ke Lek Loa **** Copyright 2010, The Effectiveness Institute, Inc. (215) 661-7620 **** Page 7
Commitment to a Clear and Common Purpose

11. All team members feel committed to our team.

12. Team members regularly discuss our team.

13. Our team’s success is about our team members.

14. Team members feel they have some control over their work.

15. The team’s success depends on each team member's individual effort.

Number of team members: 9

*The numbers on the bars represent the percentage of team members who agree with each statement.
Focus on Results

1. How often are our team objectives communicated? 97% 2% 1%

2. Our performance measures accurately reflect our effectiveness. 44% 44% 11%

3. Our team meets the deadlines we set. 72% 11% 11%

4. Our team meets the agreed upon results. 72% 11% 11%

5. Team members are motivated to achieve team goals. 72% 11% 11%

---

Number of respondents: 65

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Alignment of Authority and Accountability

26. Members of our team have the authority they need to accomplish their tasks.

27. Team members have the resources they need to get the job done.

28. Team members help each other be accountable for results.

29. Team members are held accountable for the team's results.

30. Team members carry out functional job descriptions.

---

Kaye Lee --- Copyright 2010, The Effectiveness Institute, Inc. (251) 601-7620 --- Page 12
# Team Member Ranking Summary

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
<th>Potentially Powerful</th>
<th>Unpotentially Powerful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Team members feel accountable for results.</td>
<td></td>
<td></td>
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<tr>
<td>2. Members of our team do what they say they will do.</td>
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<tr>
<td>3. Team members are fully engaged with each other when they are together</td>
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<tr>
<td>4. Team members share openly and freely</td>
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<td>5. Our team's purpose is clear</td>
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<td>6. Team members understand why the team exists.</td>
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<tr>
<td>7. Team members share openly and freely</td>
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<tr>
<td>8. Our team members agreed upon results</td>
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<tr>
<td>9. Team members are committed to achieving team goals</td>
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<tr>
<td>10. Our team makes the deadlines we set</td>
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<tr>
<td>11. Our performance measurements accurately reflect our effectiveness</td>
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<tr>
<td>12. Members of our team have the authority they need to accomplish tasks</td>
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<tr>
<td>13. Members of our team genuinely care about each other</td>
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<td>14. Team members are supportive of each other when they are not together</td>
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<tr>
<td>15. Team members act with integrity</td>
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<td>16. Members of our team have a high regard for each other's ideas and skills</td>
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<tr>
<td>17. The performance objectives for each team member align with our team's actual purpose</td>
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<tr>
<td>18. Team members truly align with the team's purpose</td>
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<tr>
<td>19. All team members are fully committed to our purpose</td>
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<tr>
<td>20. It is easy to ask the difficult questions within our team.</td>
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<tr>
<td>21. Team members do not talk behind each other's back.</td>
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<tr>
<td>22. Members of our team are kept informed of progress towards goal alignment</td>
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<tr>
<td>23. Team members have the power they need to get the job done.</td>
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<tr>
<td>24. Team members are held accountable for the team's results.</td>
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<tr>
<td>25. Team members carry their fair share of the load.</td>
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<tr>
<td>26. I feel respected by the other members of my team.</td>
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<tr>
<td>27. Team members feel comfortable talking about frustrations and concerns</td>
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<tr>
<td>28. Our team has the necessary skills to address conflicts effectively.</td>
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<tr>
<td>29. Members of our team communicate effectively with each other.</td>
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<tr>
<td>30. Team members openly share their talents and skills with each other.</td>
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</tbody>
</table>

**Legend**

- Potentially Powerful
- Neutral
- Unpotentially Powerful
The Overall Health Index metric includes all of the responses by the team members to all of the statements from all six characteristics.
ABOUT THE EFFECTIVENESS INSTITUTE

About Us
Founded in 1988, Effectiveness Institute is a team of training and consulting professionals who are experts in the areas of communication, influence and team performance. Our purpose is to deliver measurable results in the way individuals, teams and organizations perform - to build and sustain high performance cultures within our client organizations.

Our Philosophy
All enterprises rise or fall on the ability of diverse individuals to work together. They must give and receive feedback, resolve conflict, promote ideas, be loyal, motivate others and deal with their emotions and the emotions of others. When these individuals are committed to a common purpose - and treat each other with trust and respect - performance is maximized. Traditionally, these concepts have been described as "soft skills." We call them "people skills." At Effectiveness Institute, we believe that they are the critical success factors for managers and employees at all levels of every organization.

Our Methods
Effectiveness Institute provides organizations with proven models and techniques for creating high performance teams. We help clients discover how to leverage trust, respect and commitment to increase productivity and employee satisfaction.

TRAINING
Our training workshops focus on the key pressure points of most organizations: communication, teamwork, resolving conflict, leadership, managing change, customer service and selling skills. We provide only time-tested proven material. Every workshop builds awareness, achieves participant "buy-in" and develops real-world skills. While the outcomes will vary by client needs and workshop content - no one leaves unchanged.

PRODUCT/PROGRAMS/CONSULTING
The stated purpose of the Effectiveness Institute is to deliver measurable results. We accomplish this through products, training and process consulting. This means we don't supply one-size-fits-all answers. Instead we create a process where -- together -- the Institute and the client uncover the critical success factors for that organization. Only then do we propose and implement solutions. This is important because most organizations know what they currently WANT (higher profits, growth, less turnover, better service, increased productivity, lower costs) but not necessarily what they currently NEED (clearer purpose, people focus, more teamwork, stronger executive relationships).

Effectiveness Institute offers online assessments, pre-recorded webinars, videos, and phone apps for use either separately or as part of a customized program by independent consultants or internal company trainers.
Contact Us

Effectiveness Institute
320 120th Avenue NE
Building B
Suite 202
Bellevue, WA 98005
(425) 641-7620
info@effectivenessinstitute.com
www.EffectivenessInstitute.com

We love to talk with our customers, so please call us with any questions you may have about this product or our business in general.
Comments

- I LOVE working with this group! Some things that I think help us to work effectively are: 1) High level of trust 2) Self-motivation 3) Accountability (more within the group than outside of the group) 4) WE HAVE FUN 5) WE LAUGHS 6) WE EAT 7) We are productive and able to redirect ourselves if we are off task, and NO ONE takes things personally.

- This committee has positive energy that makes attendance exciting and worthwhile. We are able to ask questions without fear of being shamed or judged. Members work hard and find satisfaction in learning from and with each other.

- I am a member of several "teams" and believe our team is a very effective group of people with a very difficult task to accomplish. I appreciate everyone on our team.

- Ka Iike Loa is what I would consider to be a "high performance team." All team members are active and engaged in the work. Everyone is involved in discussions and planning of activities. Everyone shares in the workload and takes ownership of all outcomes whether good or bad. As a team, we reflect on implemented activities and look at ways to do things better in the future. All team members are committed to the work. Most importantly, we all get along and can have open and honest conversations without taking anything personal.

- This is an amazing group of people to work from. The chemistry of the group allows for deep planning and great work to be done. We have stood in front of our peers as leaders for curriculum, instruction, and assessment.

- none

- I am very happy to be part of the Ka Iike Loa Hui
REFERENCES


