Personal Journey of Expanding My Horizon and Understanding Through Learning and Growth

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Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania

Advisor: Charline S. Russo

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Personal Journey of Expanding My Horizon and Understanding Through Learning and Growth

Abstract
This Capstone examines a personal story of achieving intellectual growth and a more honest sense of oneself through the learning and the coaching achieved in the graduate program in Organizational Dynamics and in Organizational Consulting and Executive Coaching (OCEC) at the University of Pennsylvania (Penn). It describes the efforts and the opportunities to acquire new concepts, tools, and approaches for dealing with human dynamics and dynamics of change in organizations. It also explains how beyond teaching consulting and coaching methods and tools useful for changing the behavior of people in leadership roles in organizations, this Program, put a great emphasis on the need to examine oneself, to become aware of one's assumptions, strengths, and weaknesses, motives, actions and consequences. Accordingly, this Capstone highlights particular readings, class exercises and personal coaching by teachers that influenced the path to personal growth, and it shows how this learning process helped to change the leadership style at work and the personal behavior outside of work of a person who participated in this Program. I am this person, and this Capstone describes my personal experience.

Keywords
coaching, consulting, intellectual growth, learning

Comments
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Advisor: Charline S. Russo
PERSONAL JOURNEY OF EXPANDING MY HORIZON AND UNDERSTANDING THROUGH LEARNING AND GROWTH

By

AMIR SCHINNAR

Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania

Philadelphia, Pennsylvania

2019
PERSONAL JOURNEY OF EXPANDING MY HORIZON AND UNDERSTANDING
THROUGH LEARNING AND GROWTH

Approved by:

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ABSTRACT

This Capstone examines a personal story of achieving intellectual growth and a more honest sense of oneself through the learning and the coaching achieved in the graduate program in Organizational Dynamics and in Organizational Consulting and Executive Coaching (OCEC) at the University of Pennsylvania (Penn). It describes the efforts and the opportunities to acquire new concepts, tools, and approaches for dealing with human dynamics and dynamics of change in organizations. It also explains how beyond teaching consulting and coaching methods and tools useful for changing the behavior of people in leadership roles in organizations, this Program, put a great emphasis on the need to examine oneself, to become aware of one’s assumptions, strengths, and weaknesses, motives, actions and consequences. Accordingly, this Capstone highlights particular readings, class exercises and personal coaching by teachers that influenced the path to personal growth, and it shows how this learning process helped to change the leadership style at work and the personal behavior outside of work of a person who participated in this Program. I am this person, and this Capstone describes my personal experience.
ACKNOWLEDGEMENTS

This capstone would not be possible without the support of several people.

First and foremost, my heartfelt thanks and admiration go to Dr. Charline Russo who is a faculty member in the University of Pennsylvania graduate program in Organizational Dynamics and Lead Instructor in Organizational Consulting and Executive Coaching (OCEC). Dr. Russo is also my Advisor on this Capstone. One hopes to find a teacher who believes in you, understands how you learn, encourages you to keep on learning and exploring, and helps to bring out the best in you. In Dr. Russo, I had the good fortune to have found exactly such a valuable teacher. From the first to the last class, Dr. Russo has been there for me, waiting for me to cross the finishing line with the same anticipation and enthusiasm as my own. Thank you so much.

Genuine thanks also go to Bruce Freidman, Vice President of Finance and Administration at Immaculata University in Pennsylvania, for being a valued advisor as well as a trusted friend. I am grateful to have such a good friend who urged me to take on this journey and who was always supportive to the end. He was always available when I needed him and reliably offered valuable advice and encouragement.

My love and gratitude go as well to my dear parents, Arie and Rita Schinnar, and to my dear grandmother, Fanny Itshak, for their unconditional love and unqualified devotion that helped me achieve successes in my life. With my father’s wise guidance, my mother’s constant prayers, and my grandmother’s caring interest, I was always confident that my flanks are secure.

Thanks to my loving and supportive wife, Melissa Schinnar, and to my two wonderful children, Connor and Emma, for providing the motivation and inspiration to undertake this journey and working hard to persevere with it.
I must also acknowledge all my other teachers and the students with whom I had interacted in the Penn graduate program in Organizational Dynamics and the OCEC program, for making this entire experience illuminating, engaging, and enjoyable.
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CHAPTER 1.
INTRODUCTION

Introduction

I believe the simplest definition of learning is that people (and any other organisms) change as a result of new experiences (Lachman, 1997). In humans, learning is a process where new experiences lead to mental changes. With new knowledge, new symbols, new associations, new understanding, humans react in new ways to their environment, and this is how learning affects behavior (De Houwer, 2013). The effects of learning on behavior can be immediate or delayed. This Capstone aims to examine how new learning that I acquired as an adult in the University of Pennsylvania (Penn) Organizational Dynamics graduate program and in Organizational Consulting and Executive Coaching (OCEC) has affected me and changed me.

The personal experience that I want to describe and share in this study relates to a program and mentors that offered me much more than just interesting courses, readings, class discussions, and homework assignments on topics of organizational dynamics and coaching. The learning and education that I received in this program changed my previous assumptions, changed my self-concepts, changed my leadership style, changed my relationships with colleagues, family, and friends, and in general, made me more aware of my motives and more reflective about my choices and actions. The theme that runs throughout this study is the importance of self-awareness. The courses, the experiences in class, and the conversations with mentors emphasized this aspect because of the notion that self-awareness makes you also aware of others and helps you to become a better leader and a better person. In “The Handbook of Knowledge-Based Coaching” by Wildflower and Brennan (2011), I encountered a quote that
summarizes this point exactly as I experienced it. It says that “becoming a leader is synonymous with becoming yourself. It is precisely that simple, and it is also that difficult” (p.144).

In this study I will show how learning about theories of adult learning (Knowles et al., 2005; Cassidy, 2004), multiple intelligences (Gardner, 1983, 2000, 2002), personal change and growth (Rogers, 1961), and humble coaching were relevant to my transformation experience (Schein, 2011, 2016).

**Goals of this Capstone**

This Capstone has four goals:

1. To share my personal experience of how my sense of self and intellectual growth were influenced by the kinds of learning and interactions that I experienced during my three years of graduate work in the program of Organizational Dynamics at the University of Pennsylvania. I will mention books, ideas, and personal interactions that made an impact on my self-image and self-understanding. The goal of seeking self-awareness and personal growth is to become a more effective and more authentic person. To be an effective person means not just doing a job, but excelling in the job, growing on the job, and striving to make contributions to the job. To be an authentic person means to be honest about who you are, and to be aware of your motives. Improving my leadership role and strengthening my relationships – both at work and home - will increase my chances of becoming a happier person.

2. To illustrate, with examples, how abstract concepts that I learned from various books and class discussions influenced my thinking and practice in the real world.

3. To illustrate that once you learn the basics of executive coaching, you find yourself applying it, even informally, to helping other people around you grow and develop, just as you grew from this experience.
4. To create a record for myself, by way of this capstone, that will remind me of this important, useful, and enjoyable period in my life.

**Structure of this Capstone**

My reviews of relevant literature containing theories and concepts that influenced me will be embedded in the examples of my personal experiences and my reflections on how these concepts changed my behavior.

**Personal Background**

I start with examples that immediately illustrate the points that I mentioned above: how learning in this Program helped me re-examine assumptions, change concepts about myself, change my leadership behavior at work, and reframe the way I experience learning.

When I moved into my current job, it involved transitioning from executive jobs in the for-profit corporate sector into an executive job in a not-for-profit academic sector. This meant that I carried certain assumptions and a certain mindset about how organizations work into the new job. The for-profit companies where I worked immediately after I graduated from college with a business degree, first at Princeton eCom Corporation and then at Dotcom Distribution, Inc, were young e-commerce companies that were started by ambitious young entrepreneurs. When I joined them in 1999 and 2002, respectively, these companies were not very big. They were not very complex. The chain of command was not rigid. I had no difficulty accessing and interacting with people at all levels of the organization. These companies were flexible. They were open to continued innovation, and they were receptive to ideas from every corner of the organization.

In contrast, the University of Pennsylvania, where I now work, has an impressive history. It is a big, complex, rigid, hierarchical organization. One assumption that I carried with me into
the new setting was that in this big, rigidly organized, complex system, I would not have the same level of freedom to speak up and suggest changes as I was able to do when I worked in the smaller, dynamic, flexible business organizations. Another assumption was that because the university is an academic institution, my status here would not be as valued as others who are academics and scientists. These assumptions led me to believe that there would be little chance that my ideas and my “voice” could reach the top of the organization. As a result of these assumptions, my determination at the beginning of my employment at the university was just to follow the established rules and procedures that my predecessor followed for fifteen years before me, to try to be best at that.

So, what were the established rules and procedures that applied to my new job? The rules specified that as Director of Facilities at the School level, my dealings with Central Facilities at the University level must go through two designated liaison persons: An Area Manager and an Area Director. My understanding was that these were the people with full knowledge of how the system operates, how contracts are handled, how Work Orders that are submitted by the School get managed. I understood that they control the labor assignments from different Trades to fix jobs that need repairs in the School, that they controlled the pot of money that School Facilities could dip into to pay for things that needed to be done. I accepted this, and I performed my job going through these channels. Accordingly, I was on top of all the “daily issues” because I knew they were manageable, and I could get results quickly. I was doing my job.

Over time, I began to feel inadequate. As I got more familiar with my School’s mission, I became more informed about the School’s operations. I understood the issues and problems better. My relationship with the Dean became closer, and I developed an appreciation for his vision and goals for the School. At the same time, I began to feel that I was not making enough
progress towards the desired goals, and I didn’t feel that I was excelling in my job. It was my learning at the University of Pennsylvania Organizational Dynamics and OCEC that helped me understand why I was feeling inadequate on the job and what I needed to do to change this situation.

I enrolled in the Penn Organizational Dynamics graduate program soon after I became the Director of Facilities in the School of Dental Medicine at Penn. Penn Dental Medicine (PDM) is ranked the number four program in the country. As a team player, together with the Dean, the Director of Finance, and the Director of Human Resources, my work and my efforts are to protect and advance the mission of the School so it will remain in that top tier.

The complexities and challenges of managing the facilities in this particular institution, as I describe below, will show why I felt that it was vital for me to seek more education beyond my undergraduate education. The PDM at Penn facilities include:

a) **Multiple buildings**, three buildings in one site, and three offsite.

b) **Clinical facilities**, including a faculty dental practice, a pediatric dental practice, an emergency dental clinic, and soon-to-be a dental clinic for people with disabilities.

c) **Research laboratories**, including basic science with mice in a vivarium, with plants in a greenhouse, with cadavers in a pathology room.

d) **Classrooms and conference rooms** for the academic mission of the school, as well as quiet study areas for students.

e) **Offices for the administrative staff**.

f) **Other functional spaces**, including public waiting areas, public restrooms, utility rooms such as mail room, storage room, hazard materials disposal room, etc.
g) **Miscellaneous systems** such as cooling and heating systems, waste disposal systems, security systems, lighting systems, elevators, and other systems that are shared by all who occupy the School’s buildings.

h) In addition, inside every part of these structures there are large numbers of advanced, complicated, expensive technologies, including dental chairs and dental stools, dental cabinets, instruments for dental exams, instruments for dental surgery, imaging equipment, sterilization equipment, special lighting for surgery, instruments for research such as microscopes, instruments for classroom teaching such as blackboards and computers, storage bins for students and faculty.

Maintenance of all these structures (interior and exterior walls, roofs, floors, stairs, elevators, doors, and windows) and all the equipment in them involves round-the-clock monitoring, supervision, and planning. There are unplanned emergency repairs; planned phased replacements and new capital initiatives to plan and undertake. As Director of Facilities, I am responsible for all these activities. Furthermore, in such an organization, the Director of Facilities must interact with and be accountable to a large number of diverse client populations. These include faculty members and students, dental patients, alumni and sponsors that come to visit the school, administrative directors and staff, housekeeping staff, security staff, Penn Police, trades workers that provide specific repair services, liaison personnel from the University’s Central Facilities, and others from the Central Administration.

These significant and critical responsibilities and the complexities of my role made me realize that I should learn about methods and approaches to organizational management, communication, leadership, decision-making, organizational change, restructuring,
organizational culture, group dynamics, and other related subjects. This was how I chose the graduate program in Organizational Dynamics. But I got much more than learning about these topics because of excellent mentoring that guided me to enroll in the Organizational Consulting and Executive Coaching (OCEC) Program. This special learning experience was particularly helpful because this was where I was encouraged to examine assumptions about facts, people, and even about myself. This was where I was encouraged to be explicit about my goals, to be realistic about my strengths and limitations, to be frank about the motivations for my actions, to understand the impact of my relationships with others, at work and at home, to develop knowledge and skills to deal with change, and to have greater awareness of situations and of myself. Being aware of oneself is not something that most people do on a routine basis, and if they do, they are not usually objective about their motives and limitations. So, another important influence on me from OCEC was to realize things about myself that helped me change the perception that I had of myself, which led to changes in my behavior.

For me, it was not the most natural thing in the middle of life (at almost 40 years old), in the middle of the rat race (while I was holding a job, paying a mortgage on a house, supporting a wife and two small kids, dealing with other various pressures of daily life) to start reflecting on deep questions like “Who am I”, “What gives my life meaning”, “What describes me best”, “What would I do with my time if money was not an issue”, “What is missing from my life”, “What inspires me”, “Where am I going” (Alexander, 2006; Foley, 2016; McCarthy, 2019). From the beginning of the Organizational Consulting and Executive Coaching (OCEC) program, reflecting on these questions became regular requirements and practice. OCEC made specific contributions to my professional and personal life. It gave me:
• **New vocabulary**, e.g., immunity to change, ambidextrous leaders, leading from the center, positive psychology, appreciative inquiry, organizational culture, mindfulness.

• **New concepts**, e.g., models of the learning organization, models of leadership, models of adult learning, theory of multiple intelligences, coaching versus mentoring, buy-in versus ownership, work/life balance, SCARF factors (status, certainty, autonomy, relatedness, and fairness that drive people’s behavior), and how the way we talk can change the way we work.

• **New tools**, e.g., Reframing, Leadership Competency Inventory, 360- Feedback, GROW model, Myers-Briggs Type Inventory (MBTI), LIFO and other assessment instruments, observation and debrief tools, listening deeply, Ask-Not Tell, understanding the ‘Why’ of Goals, models of Liberating Structures.

• **New experiences**, e.g., how my taking personality assessments and receiving feedback from my mentors affected the understanding of myself; how coaching exercises in class and coaching assignments outside of class encouraged me to become a coach who helps co-workers to grow on their jobs; how class exercises in mindfulness help me relate differently to my family.

• Also, **new contacts**.

Going back again to the example that I mentioned above about feeling inadequate in my job at the University, things changed for me after I was introduced to the concept of Immunity to Change that Robert Kegan and Lisa Laskow Lahey explore in “Seven Languages for Transformation: How the Way We Talk Can Change the Way We Work” (2001) and “Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization”
This concept describes that the obstacles that keep people from achieving their potential and keeps people from having productive relationships are their “Big Assumptions” and “Competing Commitments”. These are barriers to success because people are unaware of these “Big Assumptions” and “Competing Commitments”. If they have awareness about this, people usually don’t test these assumptions in the real world to confirm that what they believe is true. Since people tend to act based on assumptions, preconceived ideas, biases that may have no basis in reality, they react in ways that create for them issues, problems, and stresses. Kegan and Laskow Lahey describe this as “big assumptions that have a hold on us versus assumptions that we hold” (2001, p. 67).

In class exercises in Organizational Consulting and Executive Coaching, we were taken through our Immunity Maps, developed by Kegan and Laskow Lahey (see Appendix 1). It takes courage to examine yourself as you work through the steps of this worksheet. After working on this exercise and talking about it in class, it is impossible not to learn from it and not to be changed by it. The following is a review of the steps of the Immunity Map Worksheet, showing how this exercise makes you reexamine who you are and what you believe.

In step 1 of the Immunity Map, you are required to think about the things that you feel a commitment to do in your professional, social, and personal life. Most people don’t explicitly think about the values that drive their behavior, decisions, and actions. Also, most people are not always objective about their values and motives. But this exercise starts with “I am committed to the value of or importance of….“ So, you must confront yourself and consider what you stand for, what you aim for, what you appreciate. You must find the courage to acknowledge what type of person you are and what you value most. For myself, I had to look in the mirror and ask myself: “Am I the type of person who values listening to many viewpoints? Do I value
transparency? Is it important to me that I share information with subordinates? Do I value success at all cost?”

In step 2 of the Immunity Map, it becomes even more difficult because you must think about and admit to yourself “What I am doing or not doing that prevents my commitment from being fully recognized.” Here is where you cannot hide behind excuses, why things are not going the way you want, or the way you expect, or the way you hope. You must consider the positive things that you do but also acknowledge the negative things that you do that hold you back from reaching your goals. You must have the courage to admit to yourself that maybe things are not going well for you because:

- you are too shy or insecure or maybe too confident,
- you are too critical or too polite,
- you are too suspicious or too trusting,
- you are too angry, or impatient, or intolerant or maybe too lenient and too tolerant,
- you socialize too much, or you don’t socialize enough,
- you push too hard, or you don’t push hard enough.

All these things can create barriers for you, which stand in the way of fulfilling your goals, or maybe they can work in your favor and help you fulfill your objectives.

In step 3 of the Immunity Map, you are asked to bring your hidden assumptions out into the light. The hidden assumptions are based on your preconceived ideas and biases. They are the competing commitments that interfere with how we view and react to reality. They are assumptions because they are beliefs that we hold without testing them in real world situations (Kegan and Laskow Lahey, 2009, p. 253; Kegan and Laskow Lahey, 2001, pp. 61,63,71). They are considered competing commitments because we essentially tell ourselves that we are
committed to avoiding the things that we misjudge (Kegan and Laskow Lahey, 2001, pp.77, 83). We also resist change because we bring preconceived fears and preconceived expectations to new situations. Here you must challenge yourself to acknowledge how you react to people and situations. In my situation I had to consider:

- Am I committed to the misconceived idea that in a rigid and complex organization, I’d be better off just following existing rules and procedures? Is it because of this preconceived assumption that I am focused on producing quick results that are easy to-show-for? Is it because of this preconceived assumption that I am hesitant to challenge the system and push for change to produce important results toward long-term goals?
- Am I committed to the misconceived notion that, in an academic setting, my opinions and my “voice” have less value than those of the professors and doctors that I work with? Is it because of this preconceived assumption that I am holding back and not trying to penetrate the system to understand it better and see where I can improve things and try to get my voice to be heard? Am I holding back because of the system and the rules or because of my insecurity?

This kind of exercise challenges you to face competing commitments that stand in your way of seeing the real world through the right lenses and reacting in the right ways. This kind of exercise also made me consider other assumptions which could be preventing me from making better decisions. For example,

- Am I committed to the biased belief that women are not as ambitious as men are because women put family priorities above job priorities? Is it because of this preconceived assumption that I resist hiring women or promoting women into responsible positions?
• Am I committed to the biased belief that subordinates are not as trustworthy and detail-oriented as I am? Is it because of this preconceived assumption that I don’t like to delegate too much responsibility to subordinates?

• Am I committed to the biased belief that a major reorganization in my workplace will be disruptive because it could lead to my losing access to key decision-makers and key information? Am I afraid it could lead to my losing technical support that I relied on in the old system? Do I worry that I’ll lose parts of my responsibilities? Is it because of this preconceived assumption that I resist change?

• Am I committed to the biased belief that innovation will be too disruptive because it will demand a lot of new learning? Is it because of this preconceived assumption that I resist change?

Immunity to change is the resistance that people show when they are in situations that challenge their misconceptions (Kegan and Laskow Lahey 2001, p.59). Kegan and Laskow Lahey point out that it’s not enough to acknowledge your biases and competing commitments because even if you are aware of your biases, you are still captive to them unless you try to change yourself. “We must disturb the balance, not merely look at it” (Kegan and Laskow Lahey, 2001, p. 66). Therefore, Step 4 of the Immunity Map Worksheet requires testing the Big Assumptions in real life situations and keeping track of what does or does not occur during the test. The idea is to actively look out for possible situations where you can test your hypotheses and see if what you believed happens. You can test your assumptions by looking at published literature, by talking to other people in other parts of the organization and learning about their experiences, by observing others. Collecting data from real world experience should convince
you if your assumptions are valid or not, then change your approach to people and situations accordingly.

Again, going back to my personal experience and how the insights from the Immunity Map helped my situation, it became clear to me that the hidden commitments that I carried with me in my work at the University caused me not to challenge the existing rules and procedures because I assumed that my “voice” would not carry weight here. Instead of realizing that I was to blame for feeling frustrated at work when things didn’t turn out satisfactorily (in my opinion), I blamed it on the system. I viewed myself as doing everything in my power to get things right, and I viewed the liaison persons as the obstructionists who prevented me from doing my job. I was using the unproductive languages of the complaint, blame, and criticism that Kegan and Laskow Lahey (2001) discussed in their book.

I saw my situation in a different light after learning these new concepts and working on the exercises of the Immunity Map. I made a conscious decision to challenge my assumptions that I was a small, helpless cog in this big and rigid organization. I changed my attitude from looking through the lens of “me against the large institution” to an attitude of “me working with the institution” to try to drive change. I adopted the languages of commitment, competing commitments, and personal responsibility (Kegan and Laskow Lahey, 2001). By stopping the blame game and by adopting a new strategy to create productive new relationships, and by looking for trusty mentors and listening to their advice, I picked up new leads and new information about the inner workings of the University’s Central Facilities and Real Estate Services (FRES). I learned their policies and especially their business processes, which in turn helped me to better understand my role and ultimately to perform it better. I shed my assumption that in a big institution with numerous Schools and Centers, each with its own Director of
Facilities, I was not in a unique position to make significant changes in the established operating procedures.

After shedding this assumption, I succeeded to achieve the opposite of what I imagined. I reached outside my School and across the University to other people with a wealth of experience and knowledge, different from my own. By nurturing constructive relationships with the leadership at Central Facilities, I stopped being invisible, and I achieved name recognition, and this allowed me to bypass the liaison people when things required it. I became a more effective leader by understanding how the University system works and who the key players are. By acquiring full command and knowledge of how my School’s budget works, by learning about and understanding the contracts that are relevant to my School, and by figuring out what resources I can muster - which was not obvious to me from the start - I overcame my resistance to change that previously inhibited me during the early stages of this job. This was the transformation that learning had on me. I started feeling better about myself and my work. You hear the expression that “Knowledge is Power.” It was true in my situation. My OCEC learning provided education on a variety of theories and concepts, but it also taught me more about myself and my job –it helped to improve both.

I started the Introduction with a definition of learning. I provided in the Introduction one example of how I was affected by learning. This learning came from attending courses and workshops in Organizational Dynamics and OCEC, from participating in coaching exercises, discussing new ideas and methods with my teachers, mentors, and fellow students, and finally from reading and thinking about the subjects taught. I end this Introduction with the conclusion that after all this learning it was impossible for me to walk away unchanged. I am more aware of how I interact with people, how my actions affect people, how the way I use language can help
or hurt me, how others might see me and think of me, and how my thinking can limit me from achieving my goals. This awareness now affects my behavior as a leader at work, and as a person outside of work. The example above shows how learning had an immediate effect on my behavior, but it will continue in the long term because learning sticks with you. Throughout the rest of this Capstone, I will demonstrate other effects of learning on my personal growth.
CHAPTER 2.
LEARNING AND ASSESSMENT OF PERSONAL GROWTH

In the last few years when I was studying in the program of Organizational Dynamics, I discovered that even a confident, professional, and successful adult with a stable job, a strong family, and supportive colleagues and friends, still has much to learn to achieve personal growth and understanding. To others, it may not seem that any major changes occurred in my life as a result of completing this program because I continue to work in the same job, I am still paying the mortgage on the same house, and my family and social situations remain the same. But I can tell that something is different about me.

You know that you’ve been affected by your learning when the readings for class assignments, the discussions in class, the feedback from your advisors, the new ideas that you think about make you realize things about yourself that you didn’t know, understand, appreciate, or even consider before. My experience in the program of Organizational Dynamics affected me in this way. I now have a better understanding of myself. I am much more aware of some personality flaws but am also keenly aware of my strengths. I am more aware of my motives when I plan to act. I am more attuned to how others react to my decisions, and I have resolved to be a better listener and engage people more. I look at situations through new concepts, and I respond differently. This makes me a more effective person. To be an effective person means not just doing a job, but excelling in the job, growing on the job, striving to make contributions to the job. In my case, it is striving to be a better leader and a good coach to the people that I
supervise and deal with. The sections below illustrate these assertions with specific examples and situations from my work and outside of work. The examples describe how this learning has affected my self-concept, how this learning helped me reframe problems at work, how this learning helped me change my leadership style, and how this learning helped me change myself in other ways.

How my self-concept was affected by what I learned

I grew up in a family where my father and step-father were university professors, and my mother and grandmother were researchers at the university. My university job involves management - not teaching and not research - so I didn’t have an image of myself as an academic, but as a practitioner; not a thinker but a doer. There is nothing wrong with being a doer because, in my work, I must solve complicated problems, and I am satisfied when I get the right results. But even so, I didn’t have a view of myself as a thinker. Throughout my job I am required to speak up in meetings and explain my decisions, to describe my plans, and to react to others’ suggestions, I don’t consider myself as an eloquent public speaker. Given these facts, you can see how my self-image was incredibly boosted when I read Donald Schön’s book “The Reflective Practitioner: How Professionals Think in Action” (1983), where he stated that “Competent practitioners usually know more than they can say“ (p. viii) and “Indeed, practitioners themselves often reveal a capacity for reflection on their intuitive knowledge in the midst of action and sometimes use this capacity to cope with the unique, uncertain, and conflicted situations of practice” (p. viii-ix).

Schön’s book offered me a perspective about myself that I didn’t have before. It helped me reflect on how I did things throughout my life, and it made me realize that people can be thinkers in different ways. According to Schön, thinking-in-action is a process where a
practitioner reframes and reworks a problem to the point where it leads to a re-appreciation of the situation (Schön, 1983, pp.91, 129, 134-135). It is the process where a practitioner makes certain moves, then he observes the consequences of these actions, then considers the implications from the consequences, then changes the course of action over and over until the problem is solved according to desired standards (pp. 94, 95, 99, 135). Schön describes how these steps that a practitioner takes, i.e., trying out some approach and then calibrating the approach based on feedback from the situation until the right solution is reached, are very similar to conducting scientific experiments (Schön, 1983, pp.94, 132). The steps that scientists do when they perform experiments involve:

a) Testing an assumption by trying out different conditions that support the assumption. i.e., it’s asking, “What is to be adopted to discover its consequences?” (Schön, 1983, p.93);
b) Evaluating every step, by “naming of elements, features, relations, and actions, norms used to evaluate problems, and consequences, and implications” (Schön, 1983, p. 95-97);
c) Figuring out further steps needed to get the final proof. i.e., “discover in the situation’s back-talk a whole new idea which generates a system of implications for further moves.” (Schön, 1983, p.102-135).

This process, according to Schön, is “a reflective conversation with the situation” (Schön, 1983, p. 103 and pp. 130-132) and this description fit both scientists and practitioners. A reflective practitioner finds himself “in a situation of complexity and uncertainty which demands the imposition of an order” (Schön, 1983, p. 103) and the way he responds to this situation is “seeking to discover the particular features of his problematic situation, and from their gradual discovery, designs an intervention” (Schön, 1983, p. 129). I recognized myself in these
descriptions that Schön provided because this is exactly how I always approached and solved problems, only I never considered my actions in the lofty words that Schön used here. I never viewed myself as a reflective experimenter. I viewed myself as dealing with problems through trial and error, learning from mistakes, and changing course until I was satisfied with the outcome.

To illustrate how “reflection in action” in my work led me to come up with a solution to a problem, I will describe below the process by which I ended up developing an automated Portal after a long and tedious search for a solution. Just like Schön described, it involved trial and error experimentation, and rethinking the approaches and envisioning new alternatives until finally hitting on an idea of how I might adopt to my current problem, something that I was using in a completely different context. Once I hit on the idea of how to solve the problem in a new way, I tested it, implemented it, and educated others on how to use it.

Everybody in my organization (faculty members, students, and administrative staff) knows that anytime when there is a facilities-related problem that needs to be addressed, they must notify me or my assistant, the Building Administrator, so we could in turn, communicate these problems to the Supervisors of various Trades and/or the Supervisors of Housekeeping in order to respond to the problem. The frustrating situation I was confronted with was the system which was in place when I first started in this job as Director of Facilities five years ago. In the old system, all notifications about emerging problems (called ‘Work Orders’) were communicated up the chain of command either by hard copy paper or by emails. Also, there was no standardized language for how complaints were expressed, which could result in referrals to the wrong Supervisors and could delay the proper response and resolution of a problem. Also, there was no way to assure that the Supervisors would read all their emails and paper
notifications in a timely fashion. As a result, there were often delays (or sometimes no responses to issues at all), which led to frustration and irritation by the end users whose problems had gone either unnoticed or unfulfilled. When I started this job, at first, I tried tweaking the old system to make it work better. I made small adjustments, here and there, sort of like experimenting with one new correction at a time and observing the consequences, just as Schön described.

- First, I eliminated hard copy paper printouts, transitioning to emails only, believing that papers were harder to manage and keep track of.
- Then, I created a single administrative email account for all the emails to go into, so that all the Work Orders would be managed from a single administrative account.
- Then, I created and documented rules for how Supervisors should manage the emailed data that they were receiving. These rules explained how they should configure the incoming “Work Order” emails into Outlook; how they should file the “Work Order” emails; how they should respond to end-users; basically, a “simple stupid guide” on how to manage the requests that came in. And I worked with the Supervisors to train them about these rules.
- Then, I hired another full-time employee to supervise this time-intensive job of managing the administrative account.
- Also, I spent a considerable amount of my own time micromanaging the process in the background, to ensure accuracy and timeliness.

These incremental steps didn’t improve the problem significantly, which pushed me to further think through how I could make the system even better. I enlisted the help of the Director of IT in my School to look for a platform that would allow us to construct an electronic Portal
that would integrate both facilities data from within Penn’s Data Warehouse as well as new data entry generated from within my School. In this way, we could standardize the language of Work Orders submissions, identify and eliminate duplicate Work Orders, improve the tracking of these submissions, improve response time and learn the status of these Work Orders as well as the causes for delays. It turned out that various platforms and modules that I located in the Penn Data Warehouse were too complicated for the purpose that I envisioned for my School. These modules were decidedly not user-friendly, and therefore wouldn’t be a feasible solution for my vision.

I then thought about adapting a system that I was using for another purpose to try and customize it for my needs in this new context at Penn. Years earlier when I was working at Princeton eCom Corporation, I became familiar with an electronic system called Pay Bill, which was used to issue checks; to check, detect and correct billing errors; process payment refunds; etc. My idea was to try and adapt this system to one that can handle facilities Work Orders data. This was a breakthrough that significantly improved our process of responding to facilities-related issues in my new job. After extensive planning and development, I introduced a new system that is easy-to-use and functional for the new purpose. The elements of my Portal include:

- Ability to pull data from the University’s Central Facilities system (e.g., description of problems, man hours, billing information, the status of repairs) to be integrated with our in-house data on Work Order notifications and progress.

- The ability for each Work Order to have all the information related to it viewed on one page, thereby eliminating the need to navigate through numerous pages to find information on the history of a particular Work Order.
• The ability for people to enter requests not only when emergencies arose, but also proactively if they anticipated an event might arise that could be avoided if something was addressed earlier.

• Ability for all Heads of Departments in my School to view all requests submitted by their people.

• Ability of all people to view the status on their Work Orders, for the sake of transparency.

• Ability to communicate with end users should further questions or clarifications be required, making the Portal show the complete conversation thread.

• Ability to access the system via the internet, so all Supervisors and my Building Administrators could get the requests forwarded to them even when they are away from their desktop computers. Before then, when we had Housekeeping issues, we would call the Supervisors, but 9 out of 10 times the supervisors would not pick up the phone. With the Portal, housekeeping requests go directly to their cell phones, and they must acknowledge that they checked the message and must respond immediately.

• Ability to assign different rights and levels of access for various School employees.

• Ability to enter Work Order requests by filling out minimal data fields but sufficient data to understand the issue.

• Ability for the Portal Administrator (myself) to alter data (i.e., adding/deleting users, editing the subject headings, updating email addresses, etc.), instead of having to email the IT person to request him to apply every change that comes up.

This Portal works so well that it is now being evaluated by other Schools for their application. This process illustrates how a reflective practitioner solves practical problems. This
effort was difficult, time-consuming, and full of trials and errors. The result, however, was a completely new working product. I continued looking for ways to improve this new portal more and more. Before reading Schön’s book, chances are I would have done all these things without fully knowing or appreciating the steps I took to get where I am today. However, since reading Schön’s “Reflective Practitioner,” I am much more aware of my reflective self, and I am therefore proud of myself. These types of assigned readings in the Organizational Dynamics Program were responsible for enabling me to see myself through new eyes and think more positively about myself.

It wasn’t only Schön’s book that helped change my self-concept and enhance my interest in learning. I was amazed by how much I was enjoying these studies. During my undergraduate studies, I didn’t see myself as a serious student. But from these reading assignments and class discussions in the Organizational Dynamics program, I began to understand why I was studying harder in graduate school and enjoying the work so much more. According to the theory of adult learning by Malcolm Knowles (2005), adults are more open to gain new knowledge because:

1. They are internally motivated to develop and grow;
2. They are ready to learn since they realize they need it, which is why they seek it;
3. They bring with them life experience and knowledge that make it easier to learn new things;
4. They are interested in the kind of learning that is relevant, practical, problem oriented;
5. They prefer the learning to be self-directed, i.e., learning what is useful to them. (see Appendix 2)
I noticed each of these factors throughout my adult learning, and they explain why I was open to this experience. Other concepts which also helped me to better understand myself, and view myself in a more positive and confident way, came from Robert J. Sternberg’s theory of multiple styles of thinking and styles of learning (Sternberg, 1988, 1997, 2001), Howard Gardner’s theory of multiple intelligences (Gardner, 1983, 1995, 2000; Gardner and Stough, 2002), Daniel Goleman’s theory of emotional intelligence (Goleman, 2000, 2004; Goleman and Boyatzis, 2008), and from Karl Albrecht’s theory of social intelligence (Albrecht, 2009). My previous experience with learning in undergraduate school was the traditional lectures delivered by Professors who were speaking in front of the class, or reading from their notes, or writing on the blackboard. There was no sensitivity to the possibility that all students don’t learn in the same style. Some students learn better through social interaction with their peers and instructors (The Grasha-Riechmann Student Learning Styles Scale, 1974; Cassidy, 2004; Curry, 1983), and students have different learning preferences:

- Some prefer collaborative learning with opportunities to share ideas and different talents in small groups.
- Others prefer competitive learning, where they are provided with opportunities to dominate the discussions.
- Some prefer participant learning in classes where teachers don’t just lecture but encourage discussions of study materials.
- Others display avoidant learning, preferring to avoid attending classes because they are overwhelmed by tests and grades and lectures.
• Some prefer independent learning with the opportunity to work on their own, at their own pace, on projects that they think are important and offer the opportunity to apply and show their skills and talents.

• Others prefer dependent learning with specific guidelines from teachers about what to do and how to do it. (Grasha-Riechmann, 1974).

I can say that my interest and enthusiasm about learning was strong because, in the Organizational Dynamics program and the OCEC cohort, I found opportunities to learn from a mix of styles, as opposed to just one style which didn’t fit my personality. Experiential Learning, case studies, team learning projects, being coached, and coaching others were strategies used for learning. I found these strategies more in tune with my learning preferences.

Like Schön who helped me view myself in a different, more positive light, Howard Gardner’s Theory of Multiple Intelligences (see Appendix 3) also gave me an appreciation of myself concerning things that I never considered before explicitly. First, for Gardner, intelligence is not reflected only by IQ. Also, Gardner didn’t just consider the logical-mathematical skill and verbal-linguistic skill as evidence of intelligence. According to his theory, people can manifest intelligence in other ways as well, such as spatial-visual intelligence (if someone has the capacity to think through visual images), interpersonal intelligence (if someone has the capacity to detect and respond to the moods, motivations, and wishes of others) and, finally, intrapersonal intelligence (if someone has the capacity for self-awareness) and also sensitivity to others. (Appendix 3).

Jack Mezirow (2000) proposed that adult learning is transformational learning because the new knowledge, concepts, and tools create a sense of empowerment. Adults don’t just absorb
information but rather use new knowledge to reexamine their old views and assumptions. The result of such reflection is a change in the person that also affects how they react to people and situations. This is what happened to me. I was affected by the learning, as seen in the next example.

Learning about the 360-Survey (Craig and Hannum, 2006; Wright, 2016) in the program of Organizational Dynamics and OCEC provided another important input for transforming my leadership style, my relationships with subordinates and colleagues, my understanding of my strengths and limitations, and insight to how others view my actions. I don’t think that I am different from the majority of people who find it is easier to criticize others than to accept criticism from others. In my role as Director, I have several direct reports, and I am expected to meet with them once a year to review their job performance and prepare evaluation reports for them. I like to think of myself as a fair and objective leader, but when I criticize their performance (pointing out that they are too slow, too passive, do too little), I don’t give any thought as to what they think about me (that I am too impatient, too demanding, too controlling). As expected, it was excruciating for me when it was my turn to receive critical reviews from others. In a few class exercises, I had to take the 360-Assessment Survey. Then, fellow students who acted as coaches used the results of my 360-survey to give me feedback on my strengths and weaknesses as others saw me. This tool consists of a questionnaire that is administered to different people who know you (supervisors, subordinates, peers, clients, friends) to get their feedback on your work performance, personality, and your behavior. Appendix 4 shows examples of questions for a 360-feedback.

The feedback from this exercise was presented to me in a report as well as a face-to-face meeting, and both were difficult to accept. It’s not that I didn’t already know some of these
things about myself, but to hear it from others and to be forced to acknowledge these things explicitly, required courage. Consequently, this is something one learns throughout this program: to have the courage to look at yourself in the mirror, acknowledge your imperfections, and try to change for the better. Seeing the way that others saw me (distracted at meetings and during conversations with people; tuning people out; not relaxed; too stressed; not listening; not present) hit home for me and convinced me that I needed to figure out how to change these aspects of myself. Hearing how I came across (workaholic; overworked; micromanaging; insane pace) made me realize that I needed to reexamine assumptions about working with people and that I should try to pace myself and be more reflective of my actions. It was through these kinds of exercises that I dared to think of myself more realistically and reconsider my approach to fellow workers. It changed my leadership style. I started taking the risk of delegating more responsibility to my subordinates and put into practice the concepts that I learned about “growing” a team. I will discuss this in a later section.

**How my learnings helped me to reframe the problems?**

A valuable and useful tool that I learned in my coaching classes was **reframing**. Situations often arise in a work environment where experts and decision makers hold strongly opposing ideas about how to approach a problem and solve it. The experts are eager to address the problem, and they trust their judgment that they understand the problem, but their disagreements can lead to an impasse. A way to break through the impasse is to think about reframing the problem in such a way that everyone might see it through a new perspective. Reframing a problem can cause people to consider aspects of the problem under **new assumptions** that they missed before or reconsider their old assumptions that they held before without explicitly examining them, which may not even be valid (Cranton, 1994; review article
by Ellis, 2018). If this happens, then everyone gets reeducated by the reframing. Reframing can also cause people to feel differently about the problem, perhaps making them more optimistic about possibilities or making them less anxious about perceived barriers, so they may become more willing to take on risks or more realistic about what can and cannot be accomplished. Either way, reframing is a tool for changing people’s behavior (Mezirow, 2000) by making it possible for them to break away from their initial rigid positions and feelings toward a problem (McNamara, 2012; Budd and Rothstein, 2000). Watzlawick, Weakland, and Fisch (1974) described the process of reframing as follows: “To reframe, then, means to change the conceptual and/or emotional setting or viewpoint in relation to which a situation is experienced and to place it in another frame which fits the ‘facts’ of the same concrete situation equally well or even better, and thereby changing its entire meaning” (p. 95).

Learning about this tool helped me change my approach at work. It helps me change confrontational situations into learning situations that lead to new understanding. Instead of holding stubbornly to rigid positions, reframing helps me (as well as others) to engage in more negotiations. One example from my work illustrates how reframing helped me to demonstrate how the University’s Central Housekeeping could be more efficient. Initially, we found ourselves in a conflict situation because of my disagreement with their approach. After reframing the problem, Central Housekeeping agreed to reconsider their approach and make the necessary changes.

Central Housekeeping undertook a Housekeeping Custodial Program Improvement Initiative designed to mainstream the service to make it more cost-effective. The direct impact of this initiative on the School of Dental Medicine, where I am the Director of Facilities, was that the custodial service was cut down from 27 full time employees to 21. Central Housekeeping
reached this decision based on calculating the amount of space footage in each School and establishing identical housecleaning procedures to be followed throughout the university. Theoretically, this would save the University money. This was not the case in my School; however, and it didn’t result in a properly clean space. Reason being, the denominator used by Central Housekeeping to calculate the metric of “square footage that a housekeeper can clean in one night’s work” was the amount of space needing custodial cleaning. This denominator was too simplistic because a more appropriate denominator should be the type of space needing custodial cleaning. A denominator that considers only the amount of space per building fails to consider that the housecleaning in classrooms, administrative offices, and public waiting areas is easier and goes faster than housecleaning in clinical exam rooms, surgical rooms, human labs, and animal labs. Considering only the amount of space fails to account for the type of filth generated by different spaces. For example, in Schools like Arts and Sciences, Law, Education, and Wharton that have only classrooms, administrative offices, and public spaces, the housekeeping must deal with paper litter, dust, trash, mud, and plaster.

In contrast, my School of Dentistry includes patient clinics, laboratories for basic research, and laboratories for animal research, which requires housekeeping to deal with blood, acids, glues, wax, and other sticky or hazardous materials. The amount of square footage that a housekeeper can clean in the former type of space is larger than the amount of square footage that a housekeeper can clean in the latter type of space because it requires more intensive and detailed cleaning every night. So, in meetings, I suddenly found myself encouraging people to consider a new frame of mind, allowing me to reframe the problem. By reframing the problem, it created a new understanding and new appreciation of the subtleties involved. Based on this new thinking about the problem, a new reassessment of custodial needs by type of service needing
maintenance is now underway. Once you reframe the problem in a way that offers new insight, the confrontational style is replaced by a negotiation style. The previous anger that I once directed at Central Housekeeping for their cutting down the number of needed custodial employees, and the finger pointing for not offering the appropriate level of support needed for the job in my School, has been replaced by a more patient attitude of trying to “educate” them about the flawed formulation of the problem, which led to a flawed decision. Everybody now looks at the problem through new assumptions and with new insight, so we can work better together to be useful where it is important.

The second example also shows a) how reframing a difficult situation at work helped me resolve a problem, and b) how in the process, it helped all the people involved to learn and grow and become more cooperative at work.

Central Facilities at the University tracks the budget of each School Facilities through a monthly report that shows the amount of money that the School is being billed for services rendered that utilized regular labor, labor overtime, materials, and various contracts. These reports are prepared separately for the Trades (plumbers, electricians, painters, masons, carpenters, elevator mechanics, carpet installers) and the Housekeeping Services (dusting, vacuuming, sweeping floors, bathroom, sinks, toilets; disposing trash; washing windows and doors; deep cleaning of counters and cabinets in clinic areas, etc.). These reports show the total amounts spent on these services as well as the amount over- or under the budget in each month. Central Administration routinely shares these monthly reports with the Directors of Facilities of each School and with the liaison persons between the Schools and Central, known as Area Directors. Obviously, as Director of Facilities in my School, it is not in my interest to be in the red, i.e., to keep overspending the allocated budget. I was initially upset when I’d see repeated
reports showing that we were over the budget for Trades and Housekeeping services. My second reaction was to convene the supervisors of the various Trades and Housekeeping Services to complain to them, criticize them, urge them to be more efficient, work faster, spend less, improve their methods, and do whatever necessary to cut down on the costs. This shifting of responsibility pattern continued to repeat itself: me calling them to the task, them promising to try to change things, me waiting to see improvement in the monthly budgets, yet continuing to see budget overruns, me continuing to be frustrated with myself and with these supervisors. We seemed to be stuck without hope. This changed when it occurred to me one day that I needed to reframe the situation.

I realized that if I shared with the Supervisors the monthly budget reports, of which they were never previously made aware, then maybe they would be more mindful of how they discharged their duties. General practice dictates that I notify Central Facilities of work that is needed in my School, and Central Facilities forwards the Work Orders to the Trades Supervisors and Housekeeping Supervisors, and then these Supervisors make decisions about which workers and how many to send over to attend to the Work Order, as well as supplies and materials needed to fix the problem in the Work Order. Then, these Supervisors provide to Central Facilities the bills for their labor time and materials. Central Facilities, in turn, charges my School for these expenses and shows me how much of my allocated budget was eaten up.

It occurred to me that if these Supervisors were shown the budget and were made to understand it, and they were shown the detailed breakdown of the costs and analyses for each project, which revealed the cost-per-job, then maybe these insights would lead them to greater accountability. It did. By reframing the problem in this way, and by switching from blaming to sharing information, I provided these Supervisors with an education that gave them a better
understanding of their work, and how it fits into the larger picture. Before this education, their decisions to contract with trades to do a job, assign labor to do a job, buy materials to do a job, and bill for all these costs when the job was done were carried out without understanding the concepts of cost-efficiency and cost-effectiveness. They were not exposed to these kinds of high-level cost analyses before. But after sharing these budget reports with them and educating them about the tabulations, everything got better. The improvements that resulted included:

- Better Inventory Management by these Supervisors.
- More efficient allocation of personnel to jobs by these Supervisors.
- Out-of-the box-thinking on how to use personnel in difficult situations where previously they would throw people at the problem without worrying about the cost.
- Knowledge of how budgets work and understanding that it is within their power to help control it.
- Empowerment and better morale, showing they can now manage a budget and be fiscally responsible.
- Larger sense of responsibility overall and a sense of buy-in, to assist the Dental School of Medicine in maintaining a healthy budget that comes in under-budget and achieves better results.
- Knowledge to educate others in other Schools and Centers about aspects that they learned from me in my School.

While reading one of the assigned books throughout this program, “Group Dynamics for Teams” by Daniel Levi (2017), I encountered the concept of “reflexivity” (p.77). The descriptions how this concept works and how it helps to increase a team’s motivation fit
precisely the process that I was going through to change the behavior of the Trades Supervisors and Housekeeping Supervisors to become better team players. Reflexivity is the time that a leader takes to reflect on a team’s performance and develop improvement strategies (Levi, p.77). The example above demonstrates my familiarity with this process. Reflexivity is also described as reflecting on why the behaviors occurred and giving feedback to the teams, so they understand what is wrong about their actions (Levi, p.77). I also had experience with this definition of reflexivity during the same situation as above. By engaging the team and sharing the monthly financial reports with them and explaining how their actions translated into analyses of cost-per-job, inventory-turnover rates, and excesses that resulted in budget deficits, the team’s performance improved. By focusing on increasing their understanding of their performance, instead of the prior focus of blaming them for their irresponsible performance, everybody benefitted. The evidence is in the numbers.

For example, for years, my School’s Facilities budget regularly showed overspending. In fiscal years 2011-2014 (before I came into this job), the overspending was 10.5%, 5.4%, 12.3%, and 3.0% over budget. Then, in fiscal years 2015 and 2016 (after I began this job), the numbers were 11.5% and 5.0% under budget, but this positive outcome was only because of drastic measures that I took to “stop the bleeding” (for example, making hard choices of what repairs may be deferred in order to save costs in the short run). Then, in fiscal years 2017 and 2018, after I started sharing information and learning with the Trades and Housekeeping Supervisors, the numbers were 1% and 2% under budget. For Housekeeping specifically, expenses came in at 2% and 1% under budget in 2017 and 2018, respectively. For Trades specifically, expenses came in 3% and 2% and under budget in 2017 and 2018, respectively. These outcomes were the result of the Supervisors applying better decisions to manpower allocations and more judicious
acquisition and use of materials. At the same time, these cost savings did not hurt the quality of the work performed, which pleased me, the Dean of my School, Central Facilities, and the Supervisors as well. In fairness, I must add the caveat that the overall budget improvement is also due to my improved performance. By reaching out across the university and finding helpful mentors who taught me about the ‘deep secrets’ of who controls budgets, who has access to pots of money, and how the system works, I have learned how to “play my cards better” and how to get other resources to cover some of my School’s expenses. As I mentioned before, “Knowledge is Power” and “Information is Power.”

Before I finish with this example, I want to mention one more thing. It was my impression that the Supervisors appreciated and benefited from being educated about the budget, but I was curious to hear from them how they felt about it. Therefore, I developed a short questionnaire to get their feedback. The questionnaire aimed to discover a) if employees are interested in learning on the job, b) if they change their decision-making when there is transparency and information is being shared with them, and c) if they feel better about themselves and perform better on the job when there is learning and growth on the job (see Appendix 4). I got replies from 6 out of 9 people that I contacted by email. The responses were consistently positive. Most of them checked out all the boxes, and a few provided comments to the open-ended question (See Appendix 4).

In a book by Daniel Levi (2017), in a chapter on cooperation and competition (pp. 83-103), the author lists three factors that determine team cooperation or competition. The factors are culture, personality, and organizational reward. There is little that a leader can do to change the personality of the people in a team, but by changing the culture (by my sharing information with them and enabling their education about how their decisions affected the School’s budget),
these Supervisors became more cooperative. Also, by demonstrating to Central Facilities that the School’s budget comes out with surpluses instead of deficits, the Supervisors get acknowledged both by my School’s leadership and the University’s Central Facilities. The budget surpluses are achieved not because less attention is given to responding to Work Orders, but because decisions on how to respond to Work Orders are more rational. These Supervisors are more inclined to check on existing inventories of materials and supplies instead of purchasing more of these without regard for the cost implications. They are more inclined to assign the right amount of labor needed to handle a job instead of exaggerating the resources needed. Consequently, these team members are better decision makers and all the players, including myself, my School, and the University, benefit from this new cooperation. And, the Supervisors ‘won’ bragging rights about their accomplishment. This is no small win for them!

In Edgar Schein’s book, “How to Offer, Give, and Receive Help” (2011), he discussed elements important for building and maintaining helping work relationships. He focuses specifically on the communication process (chapter 5, pp. 66-84). According to Schein, the helper who offers the expertise:

- Must figure out what is needed.
- Must not act in an intimidating, controlling way.
- Must be supportive and build confidence in the ‘client’ (i.e., the person needing help).
- Must engage in diagnostic inquiry to encourage the ‘client’ to become more self-aware and involved in the process.
- Must build the client’s capacity to diagnose his/her actions and examine the consequences of these actions.
- Must introduce new ideas and concepts that the client must deal with.
In the example of my interactions with the Trades Supervisors and Housekeeping Supervisors, I realized I followed each of these requirements. Did this happen by chance? I don’t think so. I am sure it’s because I was influenced by the ideas and approaches that learned from the readings and class discussions as well as the mentoring from my teachers and coaches in this Program.

To point out another way, how I was influenced by my studies in this Program, I list the characteristics of leadership and management in traditional hierarchical organizations in contrast to non-traditional organizations. In traditional organizations,

- Leadership is authoritative and relies on a clear chain of command, with top-down communications.
- Leadership has little interest in receiving feedback from employees.
- Leadership has little interest in sharing information with subordinates beyond what they need to know to do their work.
- Leadership is not concerned about employee morale.
- Leadership is not sensitive to diversity.
- Leadership is focused on achieving the organization’s mission and values efficiency above all other concerns. (Serifi and Dasic, 2012).

In contrast, the general theme in many of the class discussions and the assigned readings was the importance of decency. Leaders in modern organizations perform better if they pay attention to human relations, employee morale, fairness, diversity, transparency, accepting feedback from employees, sharing information, and helping employees grow on the job. I, as
well as other students in my cohort, were taught that the goal of coaching is to create a management style that is based on respect, patience, tolerance, trust, openness, meaningful communication in the relationships between superiors and subordinates (Hunt & Weintraub, 2011, pp. 30-33, 68, 72). We were encouraged to adopt the mentality that:

- It is good business practice to invite employees to think aloud about their ideas of what needs to be changed so they can become more productive for the next tasks
- Employee morale affects the chance of achieving the desired organizational goals.
- Encouraging cooperation and respectful appreciation for the voices of employees will promote innovation.
- Transparency and sharing information with employees can reduce resistance to change.

Therefore, I conclude again that it must have been the influence of this learning which changed my approach from acting like an authoritarian leader who blamed the Supervisors into a leader that showed respect for the ability of the Supervisors to learn and make better decisions, further benefitting the organization and their morale.

**How my learnings helped change my leadership style**

I already mentioned that learning in this Program helped me to understand myself better and changed my appreciation of and relationships with co-workers, subordinates, and friends. The change is that it reminds me to be more tolerant and respectful to the ideas and behaviors of other people. I was sensitized to this after witnessing an incident in one of my classes. In that example, a group of students discussed how to approach a particular problem, and the group seemed to accept the lead of one male student who dominated the discussion. At the end of the class, the female students expressed frustration that their voices “were not being heard” and were
not given serious consideration by the men. They complained that despite raising concerns about the direction that the lead male student suggested, all the men in the group chose to ignore these objections and follow the male lead anyway. The female students believed this was typical of situations where females compete with men who dominate the conversations. The female students explained how situations like this cause them to keep quiet in group meetings or causes them to feel inadequate when they do offer an opinion. The insight that different people bring to the table different voices, different styles of thinking and learning helps one understand why people react differently to a shared situation, and why they approach problems differently. This diversity can be productive, not disruptive. This insight helped me become more tolerant and respectful.

From books by Edgar Schein, “Humble Consulting: How to Provide Real Help Faster” (2016), and “Helping: How to Offer, Give, and Receive Help” (2011), by Peter Block, “Flawless Consulting” (2011), and by Jenny Rogers “Coaching Skills: A Handbook” (2012), I learned practical principles for how to coach leaders in organizations who need coaching. I realized that these coaching principles are useful not only for teaching clients but are also useful for me to practice on myself. It’s not possible to learn these principles and not to be transformed by them. For example, as a person in a leadership role, I was used to people coming to me with questions. I tended to give them answers quickly or give directives and orders on what to do next. But the coaching instructions emphasized that consultants/coaches must recognize that they don’t have all the answers. Schein touches on this when he talks about humble consultants. Instead of feeling pressured by the expectation that consultants/coaches must always have the answers, it is more realistic to build a partnership relationship between the coach and mentee, and let the solutions to problems evolve jointly through this relationship.
For this kind of partnership to develop, the coach and the mentee or client must engage in a dialogue. But dialogues require developing listening skills. Dialogues also require skills of asking good questions. Dialogues and partnerships require trust and openness between the partners. The mentee, client, subordinate, or colleague must feel safe to open up, and must trust that the coach is genuinely interested in their success/improvement. It is important that the mentee know that their coach is focused on offering help, not in the form of orders, but rather by way of diagnosing the problem and finding possible courses of action. These guidelines are both simple and are repeatedly reiterated many times in these books. The concepts are powerful, and they sink in. When subordinates come to me with a problem now, I catch myself, and I stop responding in a hurry. I make an effort to listen better. I am more patient. I try to ask more questions to dig deeper and get a complete picture of the problem. I remind myself to engage in a dialogue because I’ve come to appreciate that I may not know all the answers and that we can solve the problem better if we collaborate. I try to be authentic, to create a climate of trust and openness, and convey that I am both curious about the problem but also curious about the person that comes to me with the problem.

My transformation into this new kind of leader required commitment and dedication because I have tended to solve the problem as soon as possible and as best as possible, usually by myself, based on my opinion of what is the appropriate solution — conducting myself in a way that a humble consultant is supposed to act takes a longer time to engage with mentees or subordinates. It demands more patience and requires more listening and an open mind to look for different solutions, instead of the one best solution that I was convinced I bring to the table. Doing things in this collaborative way also removes the stress that a leader feels when he/she thinks that they have to know everything or that everything should be done one way, his/her way.
I found the ideas in these coaching books compelling and useful to me. I have taken many suggestions offered in these books and implemented them into my everyday life. Maybe not all the time, but certainly more often than I might otherwise even consider. Below is a recent example of how I am behaving like a humble consultant.

In the earlier examples, I described how OCEC influenced my self-awareness and personal growth. Some of the examples also showed how OCEC provided me with ideas and practical approaches that were useful for dealing with everyday problems of employee relations in my organization. OCEC also opened my mind to the idea that I should try to develop growth in the people who work with me. This meant that I should look at people not only in terms of their current abilities but in terms of their potential for growth. And if I see people with potential, I should help them learn and grow on the job. As a result of these ideas, I started coaching two women in my School. One has a long tenure in the role, the other a few years. Both are very hard workers, but it seemed that they didn’t make much effort to go beyond their core responsibilities.

I started to dedicate time for weekly meetings with each one to let them talk about their long-term dreams and career plans. Just seeing that I took a personal interest in them and that I was invested in helping them “grow,” motivated them to try to “think bigger.” My old style of interacting with them would have been to ask them questions and then tell them what they needed to do in order to advance. By applying my coaching principles, I learned to ask questions and then listen to what they think they should do or could do, to change their current job situation. I learned that I could help them gain insight on how they can “move up” by reacting to what I hear from them, rather than judging and directing them. Instead of relaying my opinions as to why they are not advancing in these jobs, I ask them to tell me what they think are the barriers for them. I ask them to consider whether the barriers are external to them or if they
create the barriers. I ask them what they think they could do to try and overcome these barriers. Our conversations give them a better idea as to whether they are interested in advancing in their current role and if they feel empowered. Maybe they need to look for ways to improve their skills or ask to take on more responsibilities; maybe they need to develop new relationships outside the School using resources that can help them. Coaching helps them to become more self-aware about what they want, how they feel about the job and their life, and what they need to do to change things for themselves. It’s the same process and the same results that I went through in my coaching classes.

In addition to these lessons, I learned other useful things about leadership. The book “Power of Confusion” by Martin Stankard (2016) and class discussions with the author were focused on leadership strategies when one finds himself in confusing situations on the job. The strategies encourage leaders to be cognizant of emerging trends that affect an organization and to respond adaptively with action plans. Responses should be innovative, focused on people, supportive (providing training, recognition, and rewards), inclusive, cooperative (soliciting input from every corner), and motivating (building morale). Responses should also focus on practicing openness, breaking down communication barriers, and being accountable. Leaders are expected to be role models that stimulate growth, generate enthusiasm, and both help and coach employees through confusing periods in organizations. This theme that leaders should strive to be humble, caring, and supportive was taught in various courses in the OCEC Program.

In the same book, Martin Stankard” (2016), examined why leaders may feel confused in organizations. Confusion and feeling inadequate to perform the job as a result of confusion occur:

a) When job complexities begin to exceed the skills, knowledge, and experience of leaders;
b) When job complexities require new assumptions that leaders resist dealing with;

c) When job complexities challenge leaders to take on new risks, but they fear to expose themselves to failure.

While confusion makes people feel inadequate, it can also motivate leaders to transform themselves because confusion triggers a desire for clarity. According to Stankard, clarity can be achieved by adopting:

- A frame of mind that looks at confusing situations as opportunities for learning.
- A willingness to learn new skills and build new competence.
- A frame of mind that seeks support and advice from mentors, co-workers, and wide and diverse network of relationships.
- A willingness to understand the organization as a system and learn how the parts fit and work.
- A willingness to accept new challenges, to take on risks, instead of playing it the safe.

In my work at Penn, I experienced some of the same things that Stankard talks about in this book. I experienced the confusion, I sought clarity, and I adopted actions necessary to overcome my confusion. As a result of going through this process exactly as described by Stankard, I eventually reached a good fit between my job and how I perform and feel about my job. I went through these phases when I first started my job at Penn, and again recently when the Dean of my School, with whom I worked closely and with whom I played golf, left the university and was replaced by a new Dean.
At the beginning of work, I achieved clarity by seeking and finding good mentors outside my School and outside my chain of command at the university. These mentors were experienced, dedicated, enthusiastic and energetic, and they were willing to share their knowledge and experience with me as I looked for guidance and support on how to overcome the confusion in my job. These mentors educated me on the intricate workings of the system at Central Facilities, and it was through this new understanding that I was able to be effective and bring change within that system. Clarity pushed away from the confusion and gave me the courage to be bold. More recently, I seek clarity through a willingness to accept the new challenges presented by the new Dean. This means listening carefully to his vision for the School and approaching the change with a frame of mind that I need to keep on learning to remain relevant and effective.

I mention this experience and the connection to the book and class discussions on the power of confusion to show how I benefited in various ways from different courses in Organizational Dynamics and OCEC. The program was useful to me because it offered me practical lessons that I could apply in my work and my personal life.

**What other influences helped me understand and change myself?**

In terms of my motivation and my readiness to learn, as previously stated with the criteria related to adult learning, that criteria applied to me when I was taking classes in this program. Even so, I cannot imagine that I would be doing so well and enjoy being so impacted by this curriculum, without the personal attention and genuine interest in my progress from a very special teacher, advisor, and mentor. Because I started the graduate program in Organizational Dynamics to improve my management skills, it was by chance that the first course that I enrolled in was “The Leader Manager as Coach” taught by Dr. Charline Russo. This course hooked me from the beginning because Dr. Russo was teaching it in a way that I learn best. Listening to long
dry lectures is not how I learn. In Dr. Russo’s classes, I was exposed to new ideas and new approaches in an interactive way that involved group exercises in situations that simulated real-life experiences. This practical, problem solving approach is how I learn best. In her classes, the other students and I found a safe environment for learning. She created an environment where mistakes were not ridiculed or treated as a failure but rather were looked at as opportunities for reflection and better understanding. In her classrooms with her style of teaching, the other students and I found a support system that encouraged growth, learning at your own pace, and respect for each other’s ideas, styles of thinking, and styles of expressing ourselves. Her classes were interesting, challenging, but also fun. Dr. Russo was not only a skilled teacher but also a cheerleader. The definition of a cheerleader is a crowd leader, someone who boosts the spirit—an entertainer, and ambassador of positivity. She was all of these things and also a real-life example of a person with high emotional intelligence. This is what rubbed off on us as students. I could tell that she was very busy, but she always made herself available for us to run ideas by her and explore other options. Her feedback on my classwork or homework was always helpful, and it also helped me feel important and more confident. The reason I feel it’s important for me to say these things about Dr. Russo is because of her professionalism, and her attitude affected all of us. I am sure I will not remember everything that I learned in the twelve courses that I took in Organizational Dynamics and OCEC, but I know that I will remember things that I learned from Dr. Russo because I find myself applying in my own life the principles that she stood for: positivity, respect for others, and helping others grow.

I was also deeply affected by Dr. Sharon Benjamin. Her courses on Applied Organizational Change had relevance to my work, but I was especially fascinated by her creative and holistic approach to teaching. She relied on every means—linguistic, visual, kinesthetic,
story-telling, and humor – to teach new concepts, and this made learning easy, fun, and memorable. She encouraged students to speak in class only if they had something meaningful to say, and when they were ready. When students spoke in class, she showed genuine, authentic curiosity about their thoughts, ideas, and opinions. If there was silence, she let the silence take over. I learned from her that silence has value, and being a good listener has value.

Other teachers from this Program helped me in similar ways. For example, in some classes, the assignments involved taking personality tests (for example, the Personality Fit Questionnaire and Emergenetics; the Core Values Index Assessment) and then examining the results from these tests. That’s not to say that I didn’t have some idea of what kind of person I was before taking the tests, but the companies that provided the test results (i.e., your Emergenetics Profile; your Core Values Index) attached labels and highlighted which of my responses were my strengths and which were my weaknesses. Seeing this on paper and being asked by our teachers to consider how these strengths and weaknesses affected my relationships and my leadership style was another way how this Program helped me to face myself honestly, understand myself better, and see which parts of myself I needed to develop to transform weaknesses into strengths. The comments that I got from my teachers helped me deal with the shock of seeing the feedback from these personality tests. In relation to testing results that seemed to highlight weaknesses in me, the encouraging reactions from my teachers were: “Not fatalistic weakness”; “You can reframe this”; “Ironically, I appreciate this in you”; “The key to success is mastering awareness of which energy is needed in a given situation”; “This can be overcome”; “Move beyond”. These comments were helpful to boost my morale but also helped to motivate me to work on these weaknesses instead of giving up on them.
In one of my courses, I was introduced to the concept of mindfulness, and I did a class presentation on this topic, but I was completely unconvinced that I would be applying it in my daily life. Mindfulness is a mental activity that encourages you to “be in the present” and “pay attention to your feelings, thoughts, and bodily senses” (Davis and Hayes, 2011; Germer, 2005; Hinchey, 2018). I was practicing this in class exercises, but I remember thinking to myself that I am not the type of person that can relate to this “stuff.” I tend to move fast; I have to deal with pressures at work, pressures at home, and I have so many things to do, so how am I going to take time to relax and dig into myself to be in the moment? Here is an example where through my learning, I picked up new knowledge, new terminology, new concepts, new tools. I was also wrong to think that it wouldn’t affect me. The new learning stuck with me, and to my surprise, I am practicing mindfulness while I am doing my daily commute by train between Philadelphia and New Jersey. Since I am sitting on the train for 25 minutes, separated from both my life at work and my life at home, I am free to concentrate on the moment. I close my eyes, and I am trying to relax and avoid thinking about anything except for the train ride. By the time I get into my car and drive home, I discover that I am relaxed and emotionally available to play with my kids or help my wife in the kitchen or give the kids a bath, and not feel stressed out by things that went on in the office. Turns out this new idea is useful not only for me, but also for my family. Mindfulness helps me to not only relax but also to achieve another concept that was emphasized in this Program --the importance of work/family balance.

Other influences came from other places. For example, in the book “The Integral Vision,” Ken Silber (2007) identified several routes by which people grow and attain personal development (pp.74-77). Some of these routes include:
• The cognitive process that leads a person to adopt a rational approach of looking at the world and thinking about it. The outcome of the cognitive process is awareness of what things are, how things work, and what is happening to you and around you.

• Moral process that leads a person to question whether his actions or the actions of others are ethical. The outcome of the moral process is awareness of what is right and what is just.

• Values process that leads a person to consider what goals are really important to him in his life. The outcome of the values process is awareness of which dreams, objectives, missions are valuable to pursue and justify focusing efforts to try to reach them.

• Self-identity process that leads a person to understand oneself. The outcome of this process is awareness of your abilities and weaknesses, assumptions, and biases.

• The emotional process that leads a person to feel comfortable with expressing feelings. The outcome of this process is awareness of your own emotions and sensitivity towards the emotions of other people.

• The interpersonal process that leads a person to consider his relations with others and how to sustain them. The outcome of this process is awareness how your actions, decisions, language, expectations, and demands from others affect the behaviors of others.

These concepts and the concepts that I learned in class and other required readings, such as in Victor Frankl’s “Man’s Search for Meaning” (1946), Carl Rogers’ “On Becoming a Person” (1961), Robert Kegan & Lisa Laskow Lahey’s “Seven Languages for Transformation: How the Way We Talk Can Change the Way We Work” (2001), Eric Berne’s “Games People Play” (1964), all address a similar idea: that self-awareness can lead you to transform yourself into becoming a better, decent person, and a better leader. The impact of these readings and class
discussions was to make me consider how aspects about the meaning of life, goals, values, ethics, interpersonal games, and self-identity related to myself, my actions, and my purpose. When one is absorbed in work deadlines, obligations, and family commitments and responsibilities, there is hardly any free time to sit back and reflect on the philosophical aspects of “Who am I.” By going through the Organizational Dynamics and OCEC programs, I was forced to make time to do these readings. The homework assignments, classroom discussions, and activities required reflecting on these questions and acknowledging how these concepts apply to me and affect my behavior. This is the kind of program that helped me grow.

The influence that many courses and class discussions had on us was giving us insight into self-awareness of our behaviors and the behaviors of other people with whom we interact. Learning about David Rock’s SCARF model (2008) provided insight into how perception affects human interactions. The SCARF model claims that human behavior is explained by:

a) people’s perception of what their status is relative to other people,

b) people’s perception of how much certainty they have about the future,

c) people’s perception of how much autonomy they in controlling events in their life,

d) people’s perception of the degree of fairness in their transactions with other people, and
e) people’s perception of the degree of relatedness that they have to other people.

Becoming aware of these motives, one can deal with interpersonal conflicts by explicitly talking about these motives and addressing them to try to solve conflicts.

Learning about Kruger and Dunning’s research (1999) on how people can deceive themselves about how good they are on the job forces you to consider your self-concept. Kruger and Dunning found that some people have self-monitoring skills that help them recognize competence in themselves and competence in others, whereas other people lack the capacity of
self-monitoring and their behavior is based on mistaken impressions of their abilities, their performance, and they misjudge competence in others.

Learning about “The Path of Least Resistance” from Robert Fritz’s book (1989) encouraged us to think about our own lives and whether the goals that we follow are the real goals that we desire and aim to follow in our life. According to Robert Fritz, we are conditioned from our childhood to conform to rules and expectations that are imposed on us by our parents, teachers, friends, workplace, and society, and we aren’t even aware that we live in structures that fulfill the expectations that others have from us instead of wishes and expectations that are our own. He encourages us to free ourselves from living stressful or unfulfilling lives that please others, and he insists that we should aim to unleash our creative talents and live a fulfilled life. Most people cannot just drop their responsibilities and start chasing a creative life. But at least these ideas make you reexamine the goals you pursue versus the goals you dream about. This kind of reexamination can lead you to reconsider realistically ways to create more balance in your life.

Learning from Joseph Bacaracco (“The Discipline of Building Character,” 1989, 1998) about how people react in extreme situations when they must choose between equally valued competing ideals, leads you to reflect on how you would react when faced with such situations. Bacaracco argues that people discover their core values by asking themselves, “Who Am I?” “Who Are We?” “Who Is the Company?” The idea is that as leaders in organizations, we should be aware of our values, our motives, and what drives our thinking and choices.

When I reflect on all these books and journal articles that we were made to read in Organizational Dynamics and OCEC, and the discussions and exercises that we had in class, I realize that they were intended to teach us that it is useful to engage in the process of self-
reflection, even when we are too busy or not interested in self-examination. My transformation and growth are shown in these ways:

- I am now more aware of how I think.
- I am now more aware of how I act.
- I am now more aware of how others hear me.
- I am now more aware of the balanced work/family life that I want to live.
- I am now more aware of the kind of leader that I should be and try to be.
- I am now aware that personal growth is a continuous process.
CHAPTER 3.
CONCLUSION

I remember a conversation that I had with my mom at the end of the first year in this program. She asked me if I was thinking of taking summer courses and I told her that I was. She teased me with, “It's nice, and along the way, you’ll pick up some more new words.” I replied, "Yes, and by the end of the program, I might even pick up a whole new sentence..."

As I described in this Capstone, I had a very positive experience in this program, and I did pick up new words and a few whole new sentences... Of course, I also picked up a few new ideas and a few useful new tools. The theme that seems to run through this capstone is my gratitude for all that I got out of this program.

- Gratitude for being introduced to useful new concepts and approaches via literature assignments, classroom exercises, and numerous private consultations with mentors in this program, all of which offered me new insights into how to look at situations and people in my work environment, how to think of them, and how to deal with them.
- Gratitude for how this learning forced me to also look at myself in more honest ways and acknowledge strengths and weaknesses in myself that I did not consider before, which others had recognized. This helped me to rethink my leadership style. It helped me to reassess my expectations from others and myself. It helped me be more appreciative of the diversity and contributions that people can offer.
The reading assignments and homework assignments in the courses were not easy, mostly because of the amount of work they required. The classroom exercises were also particularly trying, as they forced me to take a hard look at myself. The whole experience was very satisfying because of the meaningful, close interactions with the teachers and the students in my cohort. As the title says, this experience was for me a journey that expanded my horizons and an overall understanding through learning and growth.

I described above the strengths of this Program and the influence on me from amazing teachers, from rigorous class exercises, from courses and assigned readings. Another strength was the hands-on experience that it offered right from the start. The instruction about organizational consulting and executive coaching was not limited to what we learned in class and what we read in books but required students to practice consulting and coaching in real-life organization settings. The Course Directors were able to match each of the students with organizations that were interested in using external consulting or external coaching. Once the contacts were made, the students were left to practice in the real world what they learned in class. This meant that students had to meet with key persons in the client organization and learn about the organization, about the problem that was important for the organization to solve, about available resources and potential barriers, then develop a strategy for solving the problem, making presentations to market the recommended solutions, and getting feedback on this process. In my case, another student and I teamed up to offer to consult to a church-affiliated summer day-camp for children and adults with disabilities (the Bournelyf Special Camp) in West Chester, PA. Our consulting task was to help this non-profit organization decide how to prioritize among their ten goals and the timing of achieving each goal (immediately important, important within one year, important within five years). The expectation that we, still as students, could be
entrusted to solve a real-life organizational problem was extremely helpful. It helped to build up our confidence, to put theory into practice, to experience the challenge of meeting a deadline, to think about a problem from the perspective of the whole organization, to develop a recommendation, and to defend it.

For another real-life experience like this one, I was put in touch with a client from The Children’s Hospital of Philadelphia, who felt that she could benefit from executive coaching. This opportunity required eight sessions with the client to learn about her role on the job, her career aspirations, her strengths and weaknesses, resources that she could use to support her efforts to reach some goals, real and imagined barriers that she needs to consider, and what might be a realistic action plan for her to adopt. This experience made me think about what was the biggest change that I observed in this client between the first to the eighth coaching sessions? How does one help a client who from the first meeting appeared to be professionally strong and with a strong personality? What was the single most effective thing that I did or said that had the greatest impact on this client’s views? How comfortable was I with the approach that I used? What parts of this experience did I enjoy the most and what parts I enjoyed the least?

These real-life experiences succeeded because we already practiced several other consulting and other coaching as part of our class exercises, so we were prepared by the time when we had to do the real thing with real clients. I would recommend more time in ‘clinic’ learning with classmates, sharing our experiences and learnings as coaches and consultants. Perhaps use small learning groups, led by the students, to check in, present cases and challenging situations, to leverage each other’s learning. The students might serve as small boutique consulting and coaching organizations, learning how to work independently while sharing and leveraging learning as well.
For me, another strength of this Program was the flexibility that it offered with course schedules. Since I was working in a full-time job, it was important that I could register for required courses that were offered in the evenings or weekends. I loved the schedules that allowed me to attend classes during long days of Saturdays and Sundays. For me, it was “easier” to “stick” with the subject when it was taught in continuous long sessions than having to go to classes two or three times a week for one and a half hour each time.

In conclusion, in the world that we live in and in the organizations where we work, we are challenged to absorb and adapt quickly to new technologies, new knowledge, changes in the environment, changes in demographics, political uncertainty, and social divisions. For personal survival and for the survival of the organizations where we work, it is important to learn how to understand and navigate complexity, how to interact with co-workers, how to understand and acknowledge your own assumptions, biases, expectations, abilities and weaknesses, and how to look for and try to make use of innovative approaches and tools to deal with these complex situations. Without doubt, I feel more competent in my job and my personal life because of the concepts, tools, and approaches that I was introduced to and encouraged to practice during my learning and training in the graduate program of Organizational Dynamics and the Organizational Consulting and Executive Coaching (OCEC) program at Penn.
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The Core Values Index Assessment (CVI)


## Appendix 1. Immunity Map Worksheet

### Immunity Map Worksheet

<table>
<thead>
<tr>
<th>Improvement goal</th>
<th>Behaviors that work against my goal</th>
<th>Hidden competing commitments</th>
<th>Big assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>* I don’t like spend time in meetings and I act like how we are wasting time.</td>
<td>* I won’t able to lead in a different way * Be bored * Don’t learn * I don’t know how I will react * Anxious about time * Feel vulnerable</td>
<td>* If I don’t know how to resolve something, it doesn’t mean that other person neither do. * Sometimes I came back to idea that I could do a better job or offer a better accompanied to my colleague.</td>
</tr>
<tr>
<td></td>
<td>* When someone is talking and he could concrete his message, it feels me uncomfortable and I force him to concrete what he needs or requires</td>
<td>* How someone fails once and twice, I provide honest and empathetic feedback. If someone fails third time, I don’t insist and I don’t like to listen his arguments and I propose to move his responsibility to someone else.</td>
<td>* Time does not teach me for everything I have to do.</td>
</tr>
<tr>
<td></td>
<td>* I’m bored to listen some people talking to the same thing.</td>
<td>* Adapt my leadership to each person</td>
<td>* There are people that doing things only to accomplish without sense of realization</td>
</tr>
<tr>
<td></td>
<td>* Follow up with an approach that he will achieve it. More exchange ideas</td>
<td>* Avoid lost patience through keep assertive speech with my colleagues.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Make one on one conversations where we could exchange arguments, feelings and expectations.</td>
<td>* Not losing my sense of self</td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Keep my daily routine to practice claiming to manage any own anxiety and act with an open heart.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Appendix 2. Malcolm Knowles Assumptions of Adult Learning
Appendix 3. Gardner’s Theory of Multiple Intelligences

- **Verbal-Linguistic**
  Learning through spoken and written words: reading, listening, speaking, and writing

- **Mathematical-Logical**
  Learning through reasoning and problem-solving: numbers

- **Existential**
  Learning by seeing the "big picture". Connects real world understandings and application to new learning

- **Naturalist**
  Learning through classification, categories, and hierarchies: ability to pick up on subtle differences

- **Interpersonal**
  Learning through interactions with others: working collaboratively and cooperatively

- **Intrapersonal**
  Learning through feelings, values, and attitudes: understand other people

- **Musical**
  Learning through songs, patterns, rhythms, instruments, and musical expression

- **Visual-Spatial**
  Learning visually and organizing ideas spatially: think in images and pictures and "see" things in one's mind

- **Bodily/Kinesthetic**
  Learning through interaction with one's environment: concrete experiences

**Multiple Intelligences**
Appendix 4. What to Ask in 360 Feedback: Example Questions and Template

(https://www.qualtrics.com/experience-management/employee/360-feedback-survey-questions/)

Sample Competencies and Statements

Hello (Evaluator Name),

You’ve been asked to provide employee feedback in this 360-degree survey for (Subject Name). Below are 6 items about key leadership principles that apply to (Subject Name)’s development.

Please provide your anonymous feedback by answering the following questions:

**Self-Awareness**

Please rate (Subject’s Name/Yourself) on *self-awareness* relative to peers:

<table>
<thead>
<tr>
<th></th>
<th>Among the bottom 10%</th>
<th>Among the bottom third</th>
<th>Typical</th>
<th>Among the leading third</th>
<th>Among the leading 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeps control of their emotions and behavior, even when involved in high-pressure situations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is highly ethical</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acts professionally</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learns from their mistakes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please provide any additional feedback you have about this competency:


**Drive for Results**

Please rate (Subject’s Name/Yourself) in terms of *drive for results* relative to peers:
Is focused on the needs of the customer

Is a problem solver

Please provide any additional feedback you have about this competency:

Leadership

Please rate (Subject’s Name/Yourself) proficiency in leadership relative to peers:

Inspires continuous growth and learning in others

Handles conflict in an appropriate manner

Takes initiative to solve problems

Motivates others to reach their goals

Please provide any additional feedback you have about this competency:

Communication
Please rate (Subject’s Name/Yourself) ability with interpersonal communication:

<table>
<thead>
<tr>
<th></th>
<th>Among the bottom 10%</th>
<th>Among the bottom third</th>
<th>Typical</th>
<th>Among the leading third</th>
<th>Among the leading 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicates openly/effectively with others</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Is open and receptive to feedback/seeks out feedback</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

Please provide any additional feedback you have about this competency:

---

**Teamwork**

Please rate (Subject’s Name/Yourself) ability with teamwork:

<table>
<thead>
<tr>
<th></th>
<th>Among the bottom 10%</th>
<th>Among the bottom third</th>
<th>Typical</th>
<th>Among the leading third</th>
<th>Among the leading 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works well in a team</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Gives constructive and helpful feedback</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Treats others with respect</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Responds constructively to the mistakes of others</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Is open to change and innovation</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

Please provide any additional feedback you have about this competency:
(Subject’s Name) contributes to my ability to do my job well

☐ Strongly Disagree
☐ Disagree
☐ Neither Agree nor Disagree
☐ Agree
☐ Strongly Agree

Share a concrete example of something (Subject’s Name) does well:

Share a concrete example of something (Subject’s Name) could improve:

Are there any comments you would like to share with (Subject’s Name)’s manager?
Appendix 5. Email to Supervisors

Subject: Need your help and counting on your help: Please complete the attached questionnaire

Dear xx,

Please complete the attached simple, short questionnaire and return it to me by April 1.

The purpose is to give me useful feedback about my management style.

Looking forward to your reactions.

Thanks,

Amir Schinnar

Short Questionnaire about Learning on the Job

Please answer the questions below and send your reply to Amir Schinnar by April 1, 2019

(All responses will be strictly confidential.)

1. Your Name: __________________________________________
2. What is your Position/Job at Penn?  ________________________________

3. In what Trade do you work?  ________________________________

4. How many years have you worked at Penn?  ____________________

5. How many years at Penn until the first time when you were introduced to the Dental School Facilities Budget?  
   ___________________________

6. Do you feel that access to Facilities Budget helps you do your job better?
   
   [_____]  No difference in how I do my job now compared to before.

   [_____]  Big difference in how I do my job now compared to before.

   Note: If you answered, ‘No Difference’, please answer Questions 8 and 9.
   Note: If you answered, ‘Big Difference’, please answer Questions 7 and 9.

7. How has access to Facilities Budget affected my decision-making and choices at work?
   
   [_____]  I am more aware how my choices affect cost
|   | I am more careful about estimating the number of people needed for a job
|   | I am more careful about estimating the amount of materials needed for a job
|   | I am more careful about monitoring workers
|   | I am more careful about monitoring the jobs
|   | I am interested in seeing the Budget and cost calculations
|   | I generally feel better about my job and my role

8. Why don’t you feel that access to Facilities Budget makes a difference in your job?

________________________________________________________

9. Do you have any other comments about this experience and/or about your interactions with Amir Schinnar?

________________________________________________________
Thank you very much for your cooperation and response.

Feedback

Comments for the open-ended question #9.

Amir has introduced me to the budget. I do not understand everything about it but seeing the bottom line makes a difference in the way I put in PO’s. Working with Amir has been a learning experience. I was never been shown the budget or even asked questions about it before even though I do all the ordering and put in all the PO’s.

I appreciate working in an environment where the parameters and expectations are defined to include the budget. It would help to understand how the budget was formulated. It would help Penn, in this case Dental, if we could figure out a way to involve those that execute the daily work.

Amir helped me grow where I am today. He kept me involved with the cost factors with our department, he also expressed that honesty will take you far. Very positive contribution towards my success.