

Academic Leadership Experience Program Symposium: The Five Paths to Leadership® & Leading Change

**Sponsored by the
Office of the Vice Provost for
Faculty Affairs**

January 15, 2026



**University
of Vermont**



Your Facilitators



Gilpatrick Hornsby

Associate Vice Provost, Faculty Success
James Madison University



Sarah Seigle Peatman

Director of Partner Development
Academic Impressions

Let's be conscious of the rule of 4

A guiding principle for the workshop

Other Notes

- Your questions & ideas enhance everyone's learning
- Vegas rules
- Try to be fully present
- Chimes

OUR AGENDA

Welcome & Introductions

**Understanding Your Leadership Through the Five
Paths**

9:15-10:30 am

Break

**Using the Five Paths as Applied to Influence and
Change**

10:45 am-12:00 pm

Lunch

Leading Change through Collaboration

1:00-2:45 pm

Closing reflection & Wrap-Up



Five Paths to Leadership® Self Assessment

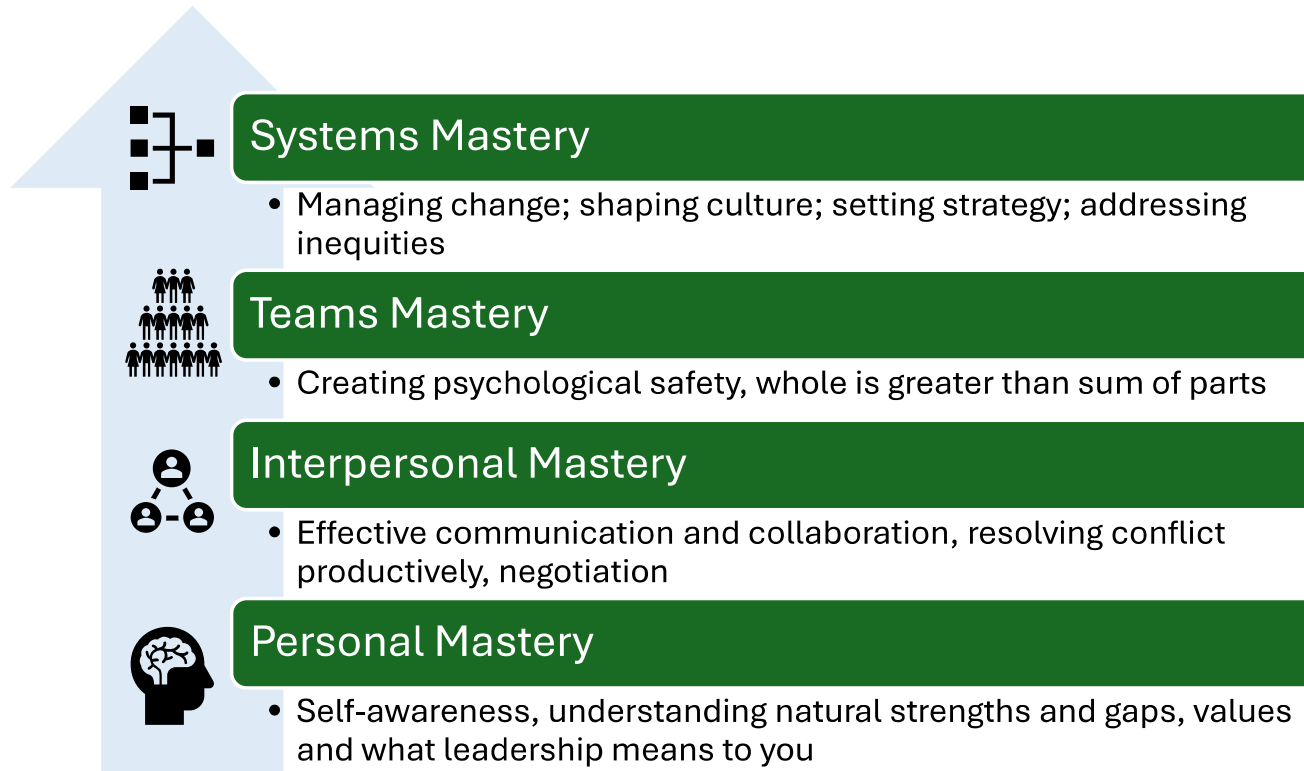


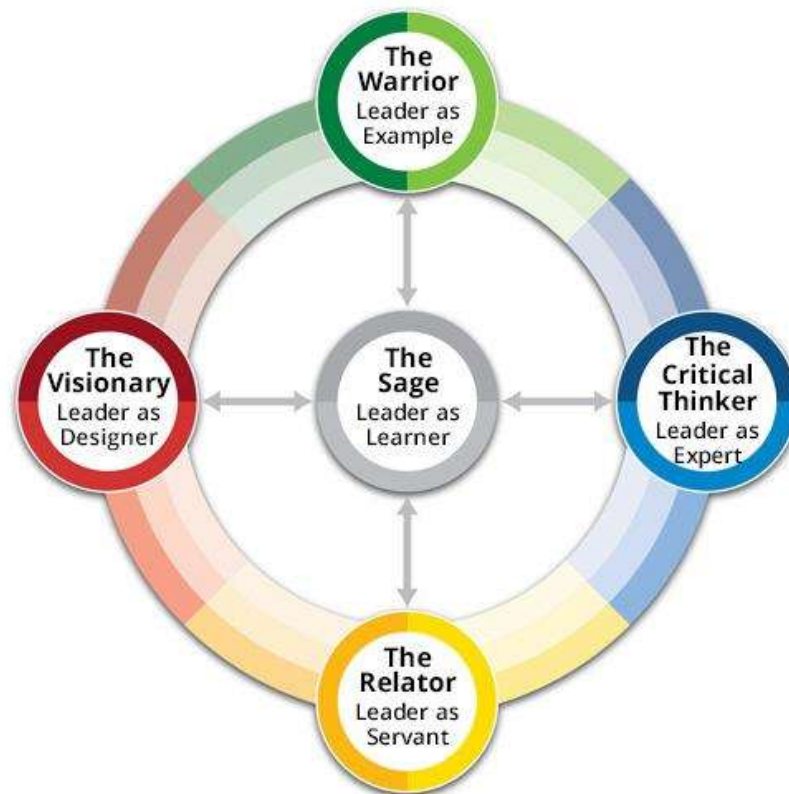
Can't find your results?

Please check your My Account section of your Academic Impressions' profile.

If you still cannot locate your results, email operations@academicimpressions.com

Four Levels of Leadership Mastery





— THE FIVE PATHS —
TO LEADERSHIP

The assessment:



Reflects a dynamic view of leadership



Is intuitive and can be applied easily



Reveals how you show up under stress



Scoring

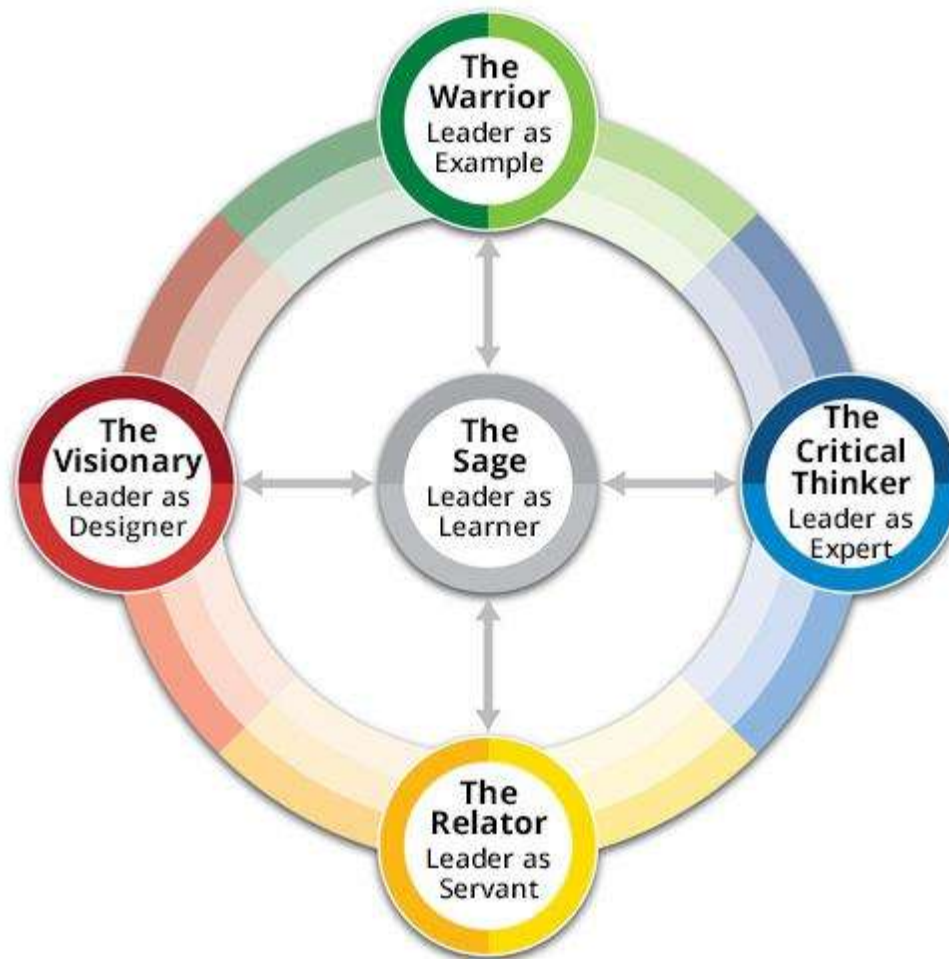
0-10	Very little access to this style
11-20	Can use if needs to but often chooses not to
21-30	Fair access to this style; uses this style easily
31-40	May tend to overuse this style
41-50+	Uses this style in extreme or excessive ways

The Critical Thinker

Driven by facts and
information
Logical/rational
Preparedness
Precision & accuracy



Analysis paralysis
Fixated on details
Rigid/inflexible
Need to be right



The Relator

Empathetic
Team builders
Values driven
Collaborative



Can't say no
Conflict averse
Unassertive
Takes things personally



The Visionary

Strategic—connects dots

Creative/innovative

Curious

Welcomes change



Inattentive to detail

Overcommitted

Overwhelm



The Warrior

Will and determination

Courage

Authenticity

Perseverance

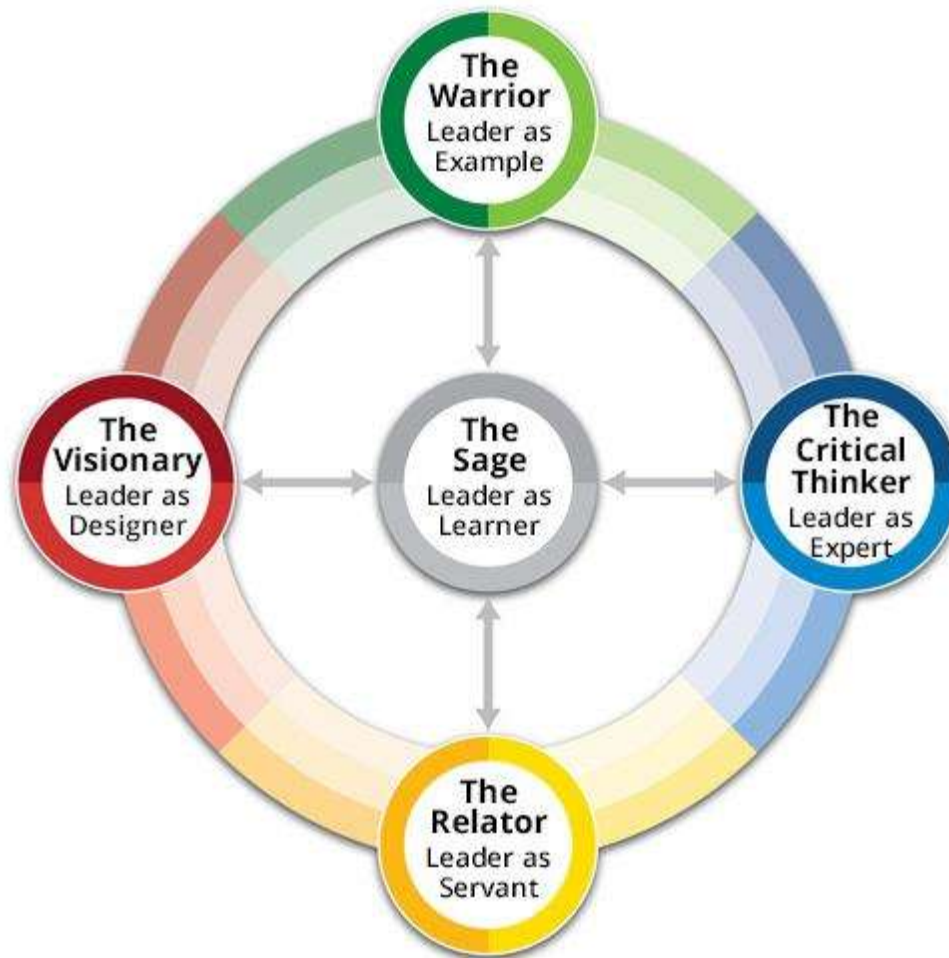


Competitive

Controlling

Bulldozing

Busyness



The Sage

Self awareness

Optimism

Sense of well being

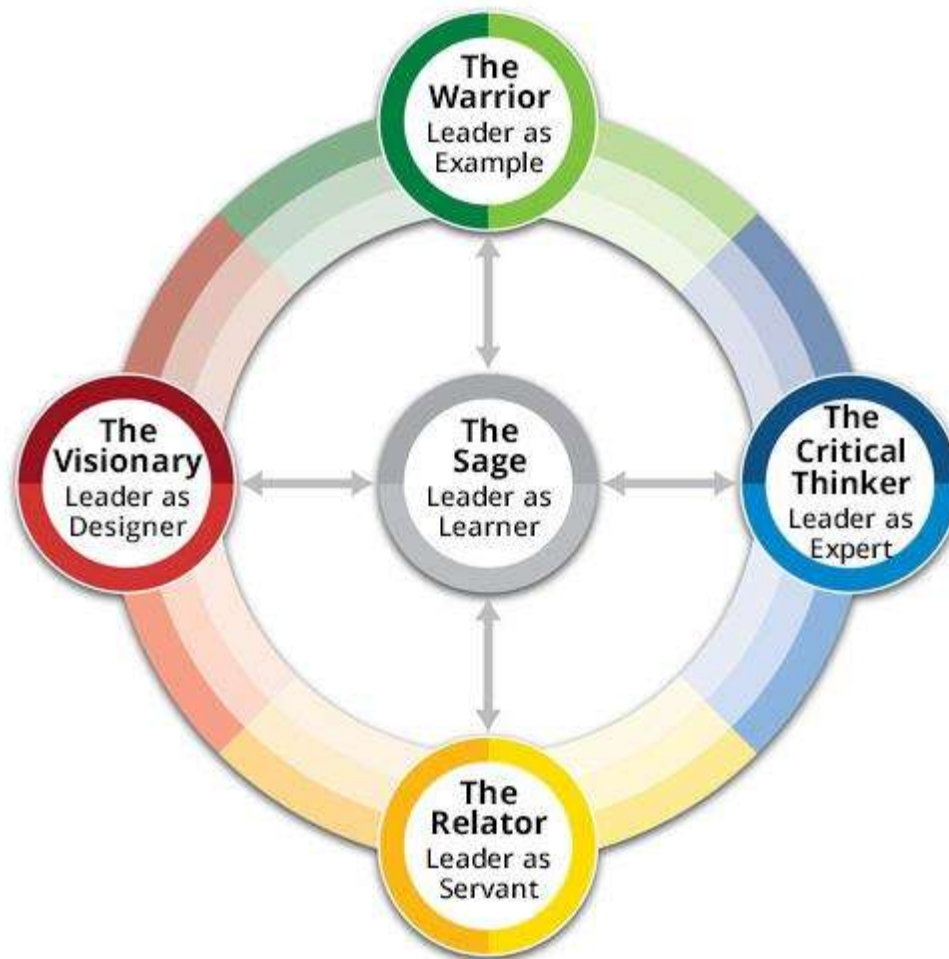


Self-absorbed

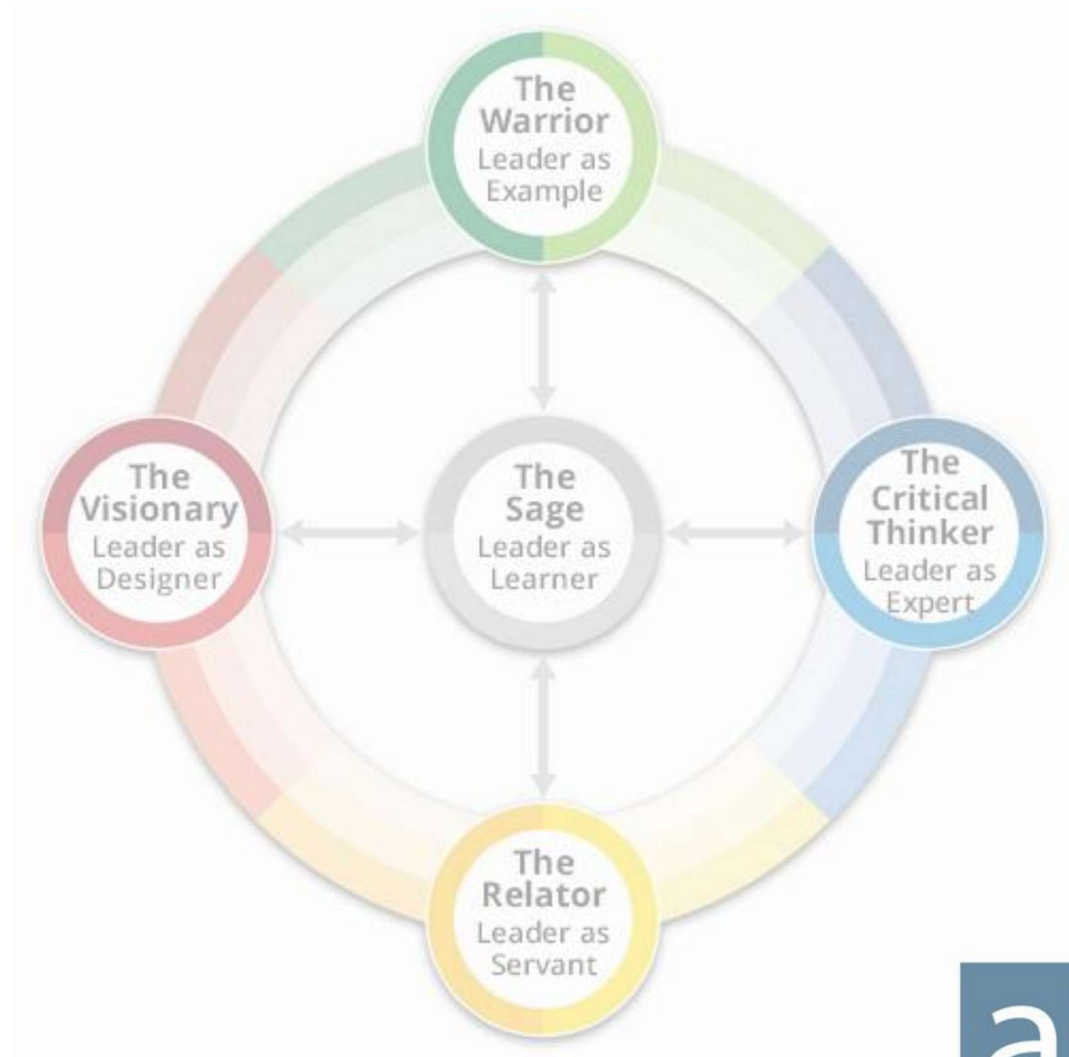
Complacent

Withdrawn

Ignore feedback



**We are all multi-dimensional,
we all encompass
multiple identities,
and we all have our own
biases**



Sarah's Scores

Warrior	Relator	Critical Thinker	Visionary
37	15	22	26
39	23	21	17

Score Range:

0 - 10 Very little access to this style

11 - 20 Can use if needs to but often chooses not to

21 - 30 Fair access to this style; uses this style easily

31 - 40 May tend to overuse this style

41 - 50 Uses this style to extreme excess

Gilpatrick's Scores

Warrior	Relator	Critical Thinker	Visionary
27	20	28	25
33	19	20	28

Score Range:

0 – 10 Very little access to this style

11 – 20 Can use if needs to but often chooses not to

21 – 30 Fair access to this style; uses this style easily

31 – 40 May tend to overuse this style

41 – 50 Uses this style to extreme excess

Volunteer 1

Warrior	Relator	Critical Thinker	Visionary

Volunteer 2

Warrior	Relator	Critical Thinker	Visionary



Questions or Reactions?



BREAK



Using the Five Paths as Applied to Influence and Change



Change Management

Change management is a structured approach for guiding individuals, teams, and organizations from a current state to a desired future state, focusing on the "people side" of change to ensure smooth transitions, minimize disruption, and achieve organizational goals.

Change Management

"Change is the only constant in life. One's ability to adapt to those changes will determine your success in life."

- Benjamin Franklin

"Never confuse motion for action."

- Ernest Hemingway

Change Management

Coalition of the Willing > Carrots and Sticks

Tapping into a person's intrinsic motivations and preferences may be a stronger determinant of influencing them to participate in change.

Influencing Others Amid Change



Faculty



You



Your Leader



The Institution

Influencing Others Amid Change



Faculty



You



Your Leader



The Institution

Influencing Others Amid Change



Faculty



You



Your Leader



The Institution

Influencing Others Amid Change



Faculty



You



Your Leader



The Institution

Small group discussion

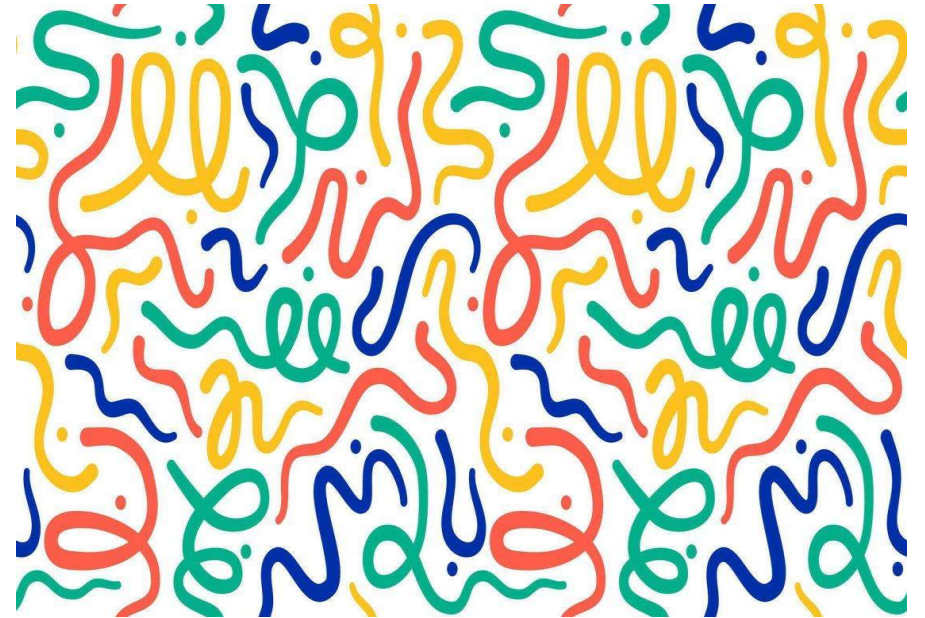
How can someone effectively influence a person who is leading through your path?

(15 mins)

PASS YOUR FLIP CHART

FOR DISCUSSION **(15 mins):**

If you were leading this person, how would you adapt your leadership approach to best influence them?



LUNCH BREAK



The Enemies of Trust

Robert Galford and Anne Seibold Drapeau
Harvard Business Review, Feb 2003



Inconsistent Messaging

Antidotes

- Make a mini “comms plan”
- Communicate for understanding
- Ensure everyone hears the same message, articulated in the same way

A photograph of a modern office interior. The scene features large, multi-paned windows that let in bright, natural light. The light creates a warm, golden glow on the left side of the image, while the right side is more brightly lit. A large, leafy plant is visible in the bottom left corner. The overall atmosphere is clean, bright, and professional.

Confusion Around Transparency



5 Levels of Decision Making

LEVEL I: Leader makes the decision **alone**

LEVEL II: Leader gathers input from **individuals** and then makes the decision

LEVEL III: Leader gathers input from her **team** but still makes the decision herself

LEVEL IV: Leader has **one vote**, just like everyone else in the group

LEVEL V: Leader **delegates** the decision with criteria and constraints

Alternatives to Consensus

I believe you understand
my point of view.

I believe I understand
your point of view.

Whether or not I prefer
the decision, I **will
support it** because it
was reached fairly and
openly.

For
decisions
that are
reversible:

Disagree

AND

Commit

OVIS Framework

O

Owner (final authority, accountable party)

V

Veto Holder (can block owner's decisions)

I

Influencer (responsible for implementing decisions, owners expected to take their input into account)

S

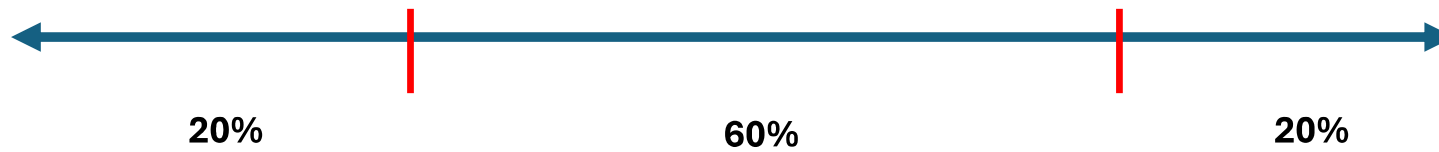
Supporters (have access to information or perspectives that will be helpful, but their input may not Influence outcome)

Communicate:

- How are decisions being made?
- Who is making the decisions?
- Who can have input on decisions vs. who can actually influence the outcome?
- What decision-making criteria are we using?
- What's the timeline for decision-making?

Not Minding the “20-60-20 Rule”







Leading Change through Collaboration

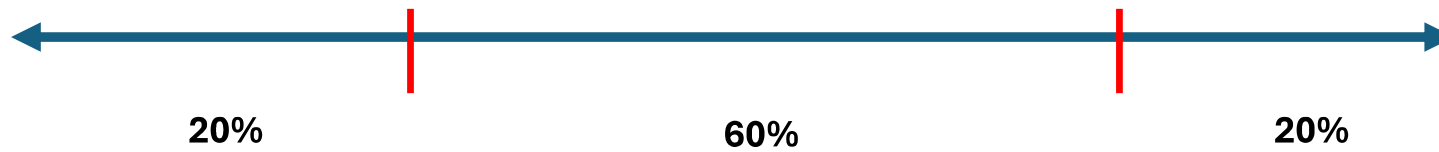
The Puzzle of Motivation



https://www.ted.com/talks/dan_pink_the_puzzle_of_motivation

The rule of 4

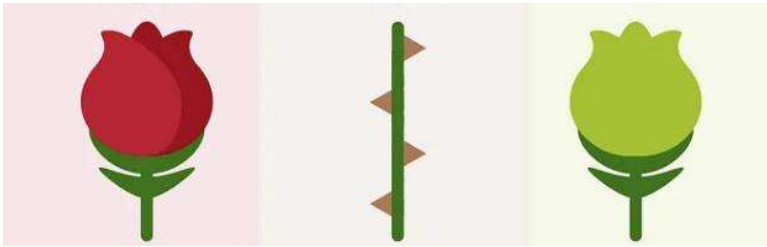
“In a group of 10-50 people, 4 people will do 80% of the talking.”



4 principles for leading effective change

- * Communicate for understanding
- * Create space for new thinking & ideas
- * Ownership—not just buy-in
- * Alignment matters

Rose/Bud/Thorn



ROSES	What has been effective? What is working well?
BUDS	What are emerging ideas or practices that show promise?
THORNS	What obstacles, barriers, or ongoing challenges do you face?

OUR TOPIC: FACULTY MORALE

Reframe Exercise

OUR TOPIC:

**RESPONSIBLE ADOPTION OF ARTIFICIAL INTELLIGENCE
ACROSS THE UNIVERSITY**

Commitment to action

From everything you've learned today, what is one thing you can commit to trying or implementing that is both **meaningful** and **manageable**?



Thank you!

sarah@academicimpressions.com

hornsbgd@jmu.edu





UNIVERSITY OF VERMONT
ACADEMIC LEADERSHIP
EXPERIENCE PROGRAM
SYMPOSIUM
JANUARY 15, 2026

academicimpressions.com

5299 DTC Blvd., Ste. 1400
Greenwood Village, CO 80111

T: 720.488.6800
F: 303.221.2259

Session 1: Understanding Your Leadership Through the Five Paths

Self-awareness is at the heart of effective leadership. This session guided participants through an interactive debrief of the “The Five Paths to Leadership” assessment, which is designed to help higher ed leaders understand their natural strengths, tendencies, and areas for growth under normal circumstances and under stress. We discussed the Wisdom and Shadow of each path and explored how each might show up in interpersonal and team contexts.

Session 2: Using the Five Paths as Applied to Influence and Change

In this session, we practiced applying the Five Paths model through the lens of influence. Participants divided into like groups according to their highest score under normal circumstances and were asked to respond to the following prompt: *“If you were educating someone else on how to go about influencing your path, what would you tell them?”* The below chart shows what each group came up with:

Warrior	Relator
<ul style="list-style-type: none"> • Courageous leadership: recognize risks, show investment, indicate motivation • Be willing to do what you ask of others • Lead with energy and determination • Be honest about potential benefits and pitfalls • Provide achievable directions • Be results oriented: don't get stuck or mired in reflections 	<ul style="list-style-type: none"> • Use empathy • Build trust—start before you need it • Make people feel they have value • We need to know purpose: up and down; want to know why—place value • Use EQ to understand how things land • Deliver messages by contextualizing how it impacts them • Helps to predict fear: deal with it because it is sometimes misplaced

<ul style="list-style-type: none"> • Encourage people to be creative and think outside the box (work against tendency to bulldoze) • Be patient at others' leadership styles • Tell people you expect clarity • Avoid being performative for the sake of performance: try to be authentic to yourself so you don't lose touch with your goal • Encourage authenticity in others • Check yourself to ensure you don't shut others down 	<ul style="list-style-type: none"> • Vulnerability as a tool: helps to build trust (can be risky) • Vulnerability as a strength—understand that • Want others to be heard and seen—help calm them
<p>Critical Thinker</p> <ul style="list-style-type: none"> • Pros vs. cons • Stories and examples of success • Multiple ways of delivering data: i.e. charts, text, figures, numbers • Preparation and research • Balance of data+ probable/concrete examples • Guiding away from “the shadow” • Be direct • Understand the motivation behind the critical thinking perspective • Allow time to evaluate, but provide a deadline—avoid analysis paralysis • Show that you've considered options 	<p>Visionary</p> <ul style="list-style-type: none"> • Communicate goals to the team • Share enthusiasm and motivation • Meaningful outcomes are part of the vision & plan • Convince people to be part of the change: what are we building/creating? What is the larger goal? • Leave space for idea generation • Visionaries desire autonomy • Reaffirm the goal and the person

- Flexibility; accept and acknowledge uncertainty in data

Leading Change through Collaboration

We closed the day by simulating two human-centered design thinking exercises that can be used to guide medium-to-large groups through the change process in a particular context (strategic planning, department or College-wide retreats, discussions about a specific issue, question or challenge, etc.) The first exercise was called **Rose, Bud, Thorn** and we looked at the topic of faculty morale:

ROSES	
Trust, Heard/Seen	Community
Sense of appreciation Transparency Transparent processes They feel heard Increased interaction in faculty meetings Making sure people feel heard and seen Inclusive of all members (rethink “the group”) Faculty recognition They think their work is making a difference Openness Sense of trust Faculty trust one another	Faculty support each other and want fellow faculty to succeed Showing up and being kind and engaged myself Supporting wherever possible Coffee w the Deans Frequent and transparent communication Creating buy-in before introducing change Effective communities Community building Department socials and gatherings Holiday end of the year College gathering Building interpersonal relationships

Good processes & participation	Opportunities
<p>Active listening</p> <p>Regular “rounds” in the department</p> <p>Invitations for faculty to participate</p> <p>Fairness in committee assignments</p> <p>Faculty engagement in response to federal action</p> <p>Task force to address emerging issue (giving people voice)</p> <p>Faculty love the students</p> <p>Engagement in the senate</p> <p>Reduced # of faculty meetings</p> <p>Documented activities</p> <p>Streamlining leadership structure to ensure accountability and not be so “top heavy”</p>	<p>New faculty mentoring circles</p> <p>R1 status and related opportunities for research active faculty</p> <p>Opportunities for new hiring</p>
	Humor
	<p>Using and encouraging humor</p> <p>Faculty engaged in strategic planning</p> <p>Prioritizing low hanging fruit that matters to most faculty, but maybe not me so much</p>

BUDS	
Mentoring	Community
<p>Establishing mentoring relationships</p> <p>Trainings</p> <p>Group training/PD activities</p> <p>Increased mentoring</p> <p>Investments in faculty development</p> <p>Midcareer programming for Associate Professors</p> <p>New faculty mentoring circles</p>	<p>More community building—happy hour</p> <p>Community building practices that faculty buy into</p> <p>Community building</p> <p>Opportunities for faculty, staff, and admin to learn together</p> <p>Fun engagements that don’t involve work (sometimes works)</p> <p>Faculty recognize that the group (Dept) at large has different strengths and</p>

	<p>weaknesses, and for the most part, tries to leverage those</p> <p>Spending time together</p>
Common goals/motivations	Miscellaneous
<p>Soliciting agenda items for meetings</p> <p>Faculty like teaching and will support others in doing so</p> <p>Common goal of wanting the department to be successful</p> <p>Reiterating successes</p>	<p>Incorporating technology to become more efficient</p> <p>Book publishing and recognition event</p> <p>Ad hoc committees: short-term, manageable tasks, effective</p> <p>Better support of upper administration by Chairs in front of faculty</p> <p>Growth of grad program</p>
Collaboration	New faculty/ideas
<p>University strategic planning process</p> <p>Faculty collaboration opportunities</p> <p>Faculty engagement in federal op response planning</p> <p>Shared governance and action</p> <p>Leaning into faculty governance</p>	<p>Recruiting young faculty</p> <p>Inspiration is encouraged</p> <p>Bringing new perspectives into the mix</p> <p>Energy from new faculty and staff</p>

THORNS	
Communication/Uncertainty	Workload
Uncertainty Mixed messages Multiple versions of the truth Incomplete information about the change Faculty not feeling they were a part of decision-making	Obstacles to getting work accomplished or improving the workplace Burdensome “mandatories” Faculty and staff perceptions of our work Getting faculty inspired to become administrative leaders Getting faculty interested in serving on College-level committees
Resources	Cultural shifts
New demands and expectations Busy work Budget Dissatisfaction with workload Economic constraints—not being able to pay what is needed Same group of faculty “volunteers” for service Disengaged and apprehensive faculty (small group) Old building Hits to research funding Loss of faculty time lines Inequities (or perceived) in workload assignment Not enough time to do what I feel is needed Structural problems: faculty feel stretched already	Faculty less present on campus Questioning the value of higher ed
	External/Political
	The world is kind of a shithole right now People not showing up or participating Federal government’s threat to academe Political climate nationally and globally
	Lack of trust
	The bottom 20% Paralysis over changes in combined percentage in teaching Risks of grievances Ignoring the 20% who are faculty Their asks are not met Working with vastly different personalities Unwilling to let go of past decisions

<p>Limited resources</p> <p>Non research active faculty feeling left out of R1</p>	<p>Attitudes</p> <p>They think administration is trying to screw them over</p> <p>Recent conflict over workload changes</p> <p>Long-standing conflicts/fissures</p> <p>The institutional inertia: "Do what we always do"</p> <p>Some groups perceive inequity in station and voice</p> <p>The 20% unwilling to embrace change</p> <p>Lack of understanding or appreciation for the relative contribution across faculty track (NTT vs. TT)</p> <p>Union grievances</p>
--	--

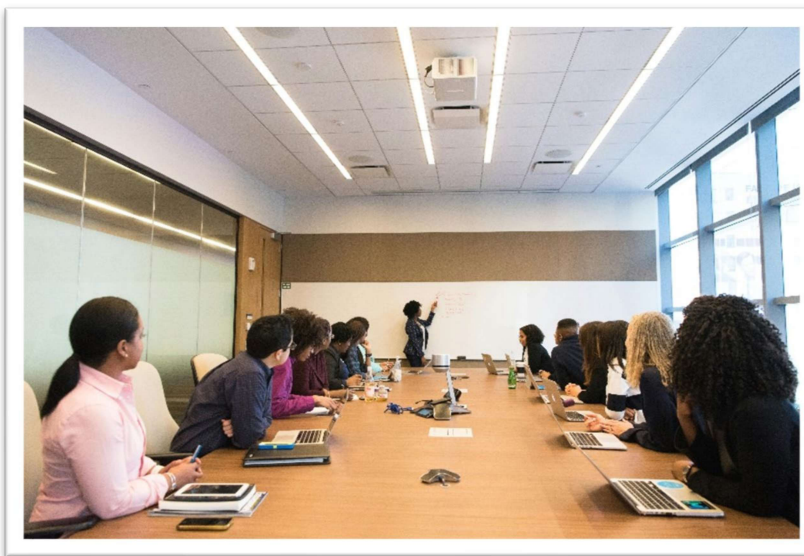
The second exercise was called the **Reframe exercise**. Participants were asked to write one response apiece to the question: "What is one thing I could do from where I sit to screw up the responsible adoption of AI across the University?" We then engaged in a facilitated process by which we acknowledged specific things we may in fact be guilty of doing in some way, shape, or form. The responses that were left are listed below:

- Mandate that AI will not be used in classrooms by faculty and students
- Not pay attention to it
- Mandating a common approach, especially without achieving buy-in
- Sow doubt. Identify unanswerable questions and over-problematize
- Assume everyone understands how AI works
- Use AI to write faculty and staff evaluations
- Lack of clarity around acceptable use of AI
- Not provide adequate training to allow faculty full benefit



ROSE-BUD-THORN

Collectively identify the strengths, opportunities and challenges of a process, program or initiative.



How many times have you attended a meeting intended to evaluate the success of an initiative only to walk away thinking:

- *“Wow...it feels like everyone just complained and vented the entire time and we didn’t really accomplish much.”*
- *“We identified a lot of problems, but what do we do next to fix those issues?”*

The Rose-Bud-Thorn technique can be used to solve for these problems. It creates a structured and fun way for a team to reflect on and recognize the strengths and weaknesses of a process, event, program, initiative, etc. More importantly, the team works together to identify patterns or themes across the strengths and weaknesses, so that they can gain a better understanding of the root causes of the problem(s) and possible ways to move forward.

Benefits of the Rose-Bud-Thorn Method

1. Allows a team to identify potential problems, issues, risks or weak spots in a fun and creative way that helps to minimize criticism or personal attacks. It provides a space for people to identify what’s not working, but it limits how much time they have to complain about those issues while also focusing on the positives.

2. Inspires discussion about how to nurture strengths and/or improve upon weaknesses.
3. Engages a diverse group of people in a way that ensures all voices in the room have an equal opportunity to contribute their ideas and perspectives, making everyone feel valued.

Summary of the Process

1. Participants identify roses (strengths), buds (opportunities) and thorns (challenges) independently. They write down their ideas on different colored sticky notes. Participants post their sticky notes on the central whiteboard/wall. All roses should be posted together. All buds should be posted together and so on.
2. Three sets of volunteers (2-3 people per category) organize the sticky notes into clusters or affinity groups based on similarities and themes.
3. In small groups, all participants discuss the results of the sorting process to make sense of what key learns emerged. Each group is expected to identify the key 1-2 ideas worth pursuing (i.e., is it better to pursue a rose, bud or thorn and which one?)
4. Each small group reports out their discoveries. Preferred ideas are recorded on a flip chart.
5. All participants vote on the one idea that they think should be pursued.

At a Glance

Activity Type:	Problem-Framing and Problem-Solving
Difficulty to Implement:	Easy
Ideal Group Size:	10 – 40
Total Time Needed:	60 - 75 minutes
Materials:	Three different colors of sticky notes (possibly pink for roses, green for buds and yellow for thorns) Pens and markers Easel and Flip chart (or just flip chart paper that can be affixed to the wall) Stickers (one per person)



PREPARING FOR THE ACTIVITY

The following are tips for how to prepare for this activity.

Tip #1: Pick a space that allows for movement.

During this activity, participants may need to spread out and move around the room. Make sure there is ample room for people to move around.

Tip #2: Identify an empty wall or whiteboard space that will serve as a place to document and arrange sticky notes.

During this activity, participants will write down their ideas on sticky notes and then they will display those sticky notes in a central place, such as a whiteboard or empty wall. Make sure you identify that space before starting the activity.

Tip #3: Organize tables/chairs, so they are directed to the empty wall/whiteboard.

Since the sorting of sticky notes into affinity groups will be a central part of the process, we recommend you organize tables and chairs so they are pointing to the empty wall/whiteboard space that will be used for organizing sticky notes. Make sure the tables and chairs are not up against the wall where the sticky notes will be organized since people will need to be able to interact with the wall. We recommend at least 10 feet of clearance.

Tip #4: Make sure there are plenty of sticky notes scattered around the room.

Although you can hand out the sticky notes during the activity, it can save time if you scatter small stacks of sticky notes around the room ahead of time. When doing so, make sure there are 3 different colors of sticky notes at each “station” where you place sticky notes.



ACTIVITY INSTRUCTIONS

Step 1: Facilitator Explains The Activity

5 minutes

1. Present participants with the process, program, project or initiative you're asking them to evaluate. Feel free to provide context for why it's important to evaluate the success of the initiative.
2. Explain how the activity will work. Namely, each participant will need to identify roses, buds and thorns for the initiative in question. You can use the following chart to explain the meaning behind roses, buds and thorns. Note: **For the "Example Questions" column, pick only one (1) question to ask for each category. Do NOT provide all questions to the group.** In other words, you'll be asking three questions – one for rose, one for bud and one for thorn. You can pick and choose what questions are most relevant based on the initiative you're evaluating. Feel free to create your own questions as well.

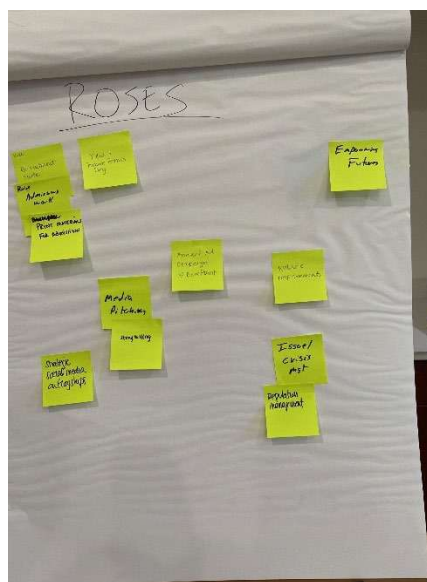
Category	Definition of Category	Sticky Note Color	Example Questions to Frame the Category (Pick Only One From Each Category)
Roses	Represents an optimistic, positive or successful situation; strength or asset	Pink (or Orange)	<ul style="list-style-type: none">• What's easy or working well?• What's something positive about (the event/program/initiative)?• What are you proud of?• What was a highlight?• What's a strength or asset?
Buds	Represents something of promise or potential; something that is worth pursuing, developing or growing	Green	<ul style="list-style-type: none">• What's a potential opportunity?• What's an area that is worth exploring?• What are you looking forward to?
Thorns	Represents a challenge, problem, issue or failure; something that needs improving or removing	Yellow (or Blue)	<ul style="list-style-type: none">• What can be improved?• What's not working?• What is something negative?• What caused stress?• What was difficult?• What do you wish had been better?

3. Explain the ground rules as follows:
 - a. Participants should write down only one idea per sticky note.
 - b. Participants can use as many sticky notes as needed.
 - c. Participants are encouraged to write down multiple ideas per sticky note color. In other words, they can generate many ideas for roses, buds and thorns.
 - d. Participants do NOT have to have the same number of ideas across categories. For instance, it's ok to come up with 5 roses, 3 buds and 2 thorns.

Step 2: Participants Independently Brainstorm

5-10 minutes

Allow participants to identify as many roses, buds and thorns as they can. This should be an individual activity. When they are ready, they should post their ideas on the central whiteboard/wall, making sure to place roses with other roses, buds with other buds and thorns with other thorns. The following images show how this can be done using flip charts.



Step 3: Volunteers Organize Each Category into Themes/Clusters

10 minutes

1. Identify 6-9 volunteers. Organize them into three groups of 2-3 each. Assign each small group one of the categories (i.e., rose, bud, thorn.)
2. Ask each volunteer group to sort through the sticky notes within their designated category. Their goal is to organize the ideas into themes and label the themes. They can determine how many different themes emerge, what the name of the theme is and what specific sticky notes fit within that theme. When sorting sticky notes, they can and should feel free to

move the sticky notes around into the clusters. Once they have organized the ideas, they should label each theme by name.

Step 4: Small Groups Discuss the Results and Identify Ideas Worth Pursuing

15 - 20 minutes

1. Organize participants into small groups of 4-5.
2. Ask them to make sense of the results that emerged and have them discuss which ideas are worth pursuing. To help them arrive at conclusions about what the best ideas are, consider doing a time assessment to help them identify where focus should be placed. Use any/all of the following questions to spark conversation:
 - a. What general themes are you noticing? For instance, did we identify more of one category than another?
 - b. Where are we spending most of our time – in thorns or roses/buds? If it's thorns, why do you think that's the case?
 - c. Based on your answer to the previous question, is this where we *should* be spending our time?
 - d. Is it possible to reallocate more time to roses and buds? How much could we gain if we shifted more of our time to the buds or roses? What impact or benefits would a shift like this bring?
 - e. Based on your discussion, where are the most impactful opportunities? Should we double down on roses, focus on buds or fix thorns? Specifically, what 1-2 ideas does your group think are most important to focus on?



The purpose of this discussion is for the groups to identify where the most leverage will come from. It could be fixing thorns, but usually it is about spending more time with a rose or bud.

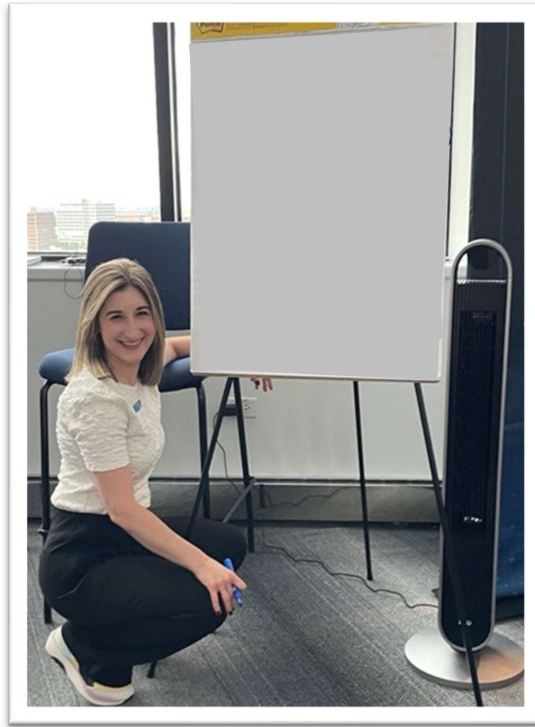


It is common for groups to identify more thorns than roses or buds. This is because thorns are very real and emotional and because of this, it's often easier to feel their effects before the roses and buds. As the small groups discuss the results of the sort, there may be an opportunity to reframe a thorn into a bud if the small group feels the time spent on repairing the thorn will yield positive results and it's worth the effort.

Step 5: Small Groups Report Out

20 minutes

Ask each small group to share out the results of their discussion. Make sure they share general themes as well as the 1-2 ideas they think are most worth pursuing. As they name their preferred ideas, write them down on a flip chart.



As the small groups report out, you may also want to write down key observations or trends they named. You can also facilitate the conversation and probe further with certain comments that are made. For instance, if a group says “We should pursue X bud because it’ll be good for students”, you can follow-up by asking “In what ways will it be good for students?” The goal is to help the groups vocalize their ideas as well as the purpose behind those ideas.

Step 6: Participants Vote on Top Idea to Pursue

5 minutes

It is likely that many possible roses, buds and thorns were suggested to pursue. Since it will likely not be possible to pursue all of them, ask the group to vote on their #1 preference.

1. Give each participant one (1) sticker. The stickers could be sticky dots, stars, your institution’s logo/mascot, etc. The stickers should be the same for everyone participating.

- 2. These stickers represent a vote. Each participant should place their sticker/vote next to the singular idea they like the best.
- 3. Once everyone has placed their vote next to the idea they like best, examine what ideas received the most votes. There will likely be some ideas with more votes than others and those reveal the team’s preferences.

Example: If these were your team’s results, this would show the group prefers to pursue Bud #2 or Rose #2, in that order.

Rose #1	★ ★
Bud #1	★ ★ ★ ★ ★ ★
Rose #2	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★
Thorn #1	★ ★ ★ ★ ★ ★
Bud #2	★ ★

Step 7: Facilitator Highlights Next Steps

2-3 minutes

Since the group has generated many great ideas, thank them for their participation and let them know what to expect moving forward. For instance, if further decision-making is needed, explain to them what that process will look like. On the other hand, if any of the ideas generated can be acted upon immediately, define who will be doing that work and what the timeline/process will look like. In other words, explain to the group when and how their ideas will be used.



APPLICATIONS FOR USE

This collaborative method can be used in a wide array of situations. The following are some examples of how you can use this technique, but by no means is this an exhaustive or prescriptive list. Challenge yourself to think about how *you* can use this method.

Prioritizing Multiple Initiatives

Let's imagine that your unit is experiencing initiative overload and you're wanting to evaluate which initiatives to prioritize.

Ask your team the following: Given our stated purpose as a unit, which is to (fill in the blank), let's evaluate how well our many projects and initiatives are helping us achieve our purpose. Evaluate our programs as follows:

- Rose = What projects are contributing to our success?
- Bud = What projects are emerging with potential?
- Thorn = What projects are taking us away from our purpose?

Once you have everyone's feedback, you can use it to help you focus on what initiatives should be(come) a priority.

Evaluating New Events

Let's say your department or unit recently hosted a new event. It could be a new student orientation, a fundraising event to bring in new donors or a community event designed to showcase the amazing work that faculty are doing across the campus. You can use this method to evaluate the success or impact of the event.

Consider bringing a cross-section of people together including those who planned the event and those who participated in the event. Ask them to evaluate the following:

- Rose = What was most impactful/fun/interesting/successful about the event?
- Bud = In what ways could we improve or refine the experience if we host this again?
- Thorn = What went wrong or what might we want to eliminate for future events?

Once you have everyone's feedback, you can use it to redesign future events with the roses, buds and thorns in mind.

Assessing Success of Strategic Initiatives

Many strategic initiatives take several years to fully envision and execute. You probably shouldn't wait until the end to evaluate how things are working. You can use the Rose, Bud, Thorn activity to evaluate progress along the way.

For instance, let's say you're chairing a committee charged with a three-year endeavor to increase student retention. Consider bringing your committee together, and inviting a handful of other stakeholders who are engaged with the work. Convene the meeting after year one as a way to evaluate progress being made. Ask the group the following:

- Rose = What's going according to plan? Where are we seeing results?
- Bud = Where are we experiencing "bumps in the road" that we need to smooth out?
- Thorn = What's wrong or not working as we hoped? What do we need to fix?

You'll want to do a similar activity after year 2 and year 3 to continue evaluating over time. If checking in once a year is not sufficient, consider hosting these sessions once every 6 months.

Likewise, if the initiative you're working on has a shorter time horizon – let's say it's due to finish within 1 year – you can host these sessions once every quarter. Bottom line: You get to decide how often these Rose, Bud, Thorn sessions are needed.

How Could We...

Before

Thinking we
just need to
fix the
problem



After

Understanding
where we can
have the most
impact

REFRAMING A CHALLENGE

(Otherwise known as “How Can We Screw Things Up?!”)

Make the Problem
Worse?

Critically examine an existing challenge from a different perspective to discover ways you can make the most impact



When we identify a problem, we naturally come up with new ideas or solutions that we think will address the problem. There are many challenges to this approach:

- 1. In many cases, the new ideas add new or additional work to our plates and we often don't have the capacity to take on more.*
- 2. We may not fully understand what's contributing to the problem, so we might be fixing the wrong things.*
- 3. We might create solutions that work well for one unit, but don't take into consideration the needs or perspectives of other units, which can make systemic issues worse and make shared ownership more difficult to achieve.*

The Reframing a Challenge technique can be used to solve for these problems. In this activity, you'll present a challenge or problem to your team and then ask them to think about how they can make the challenge *worse* – instead of fixing it. **In shifting the group's perspective from problem-solving to “how can we screw this up?”, you and your team can more easily identify ways in which you might be contributing to the challenge in the first place.** Take it one step further and ask your team to vote on the most impactful ideas, so that you can figure out where to prioritize attention for greatest impact.

Benefits of the Reframing Method

This method allows a group to:

- Examine a challenge – especially a complex one - by looking at it from a different perspective.
- Explore how they are currently contributing to the challenge – knowingly or unknowingly – and then use that knowledge to create shared ownership for fixing the challenge.
- Recognize how they can influence or impact the challenge in a positive way.
- Say “let’s get out of our own way and stop adding solutions that may not really be helping us long-term.”

Summary of the Process

1. Facilitator welcomes the group, sets the stage and introduces the challenge area the group will explore together.
2. Every participant writes one example of how they can personally or through an action of their department make the challenge worse. Each idea is placed on a wall.
3. One by one, the facilitator reviews each idea, asking the group to confirm if the organization is doing anything that remotely resembles what’s written. If the answer is yes, the idea remains on the wall. “No” answers are removed from the wall.
4. Participants vote on the top two ideas that are both manageable and meaningful to address, and that are within their control to do something about.
5. The group discusses the results of the exercise.

At a Glance

Activity Type:	Problem framing
Difficulty to Implement:	Easy
Ideal Group Size:	10 – 40
Total Time Needed:	45 – 60 minutes
Materials:	Large strips of flip chart paper (see below) or sticky notes
	Tape
	Markers/pens
	Timer
	Stickers (two per person)



PREPARING FOR THE ACTIVITY

The following are tips for how to set up the room and prepare for this activity.

Tip #1: Identify an empty wall or whiteboard space that will serve as a central place to display the team's ideas.

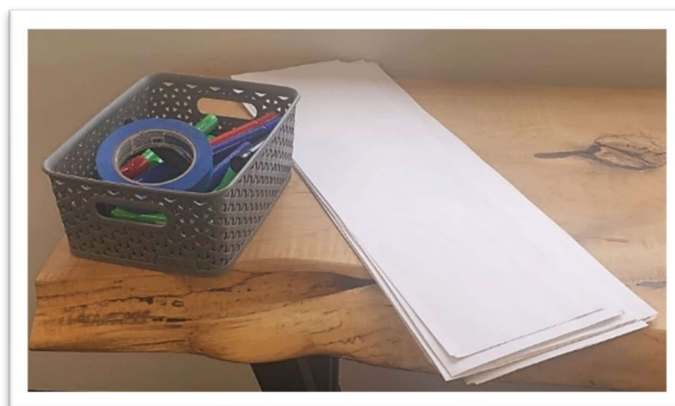
During this activity, individuals will write down ideas on large strips of paper or sticky notes and those ideas will be displayed on a wall. Make sure this area is easily visible to all.

Tip #2: Consider organizing tables/chairs so they are directed to the empty wall/whiteboard.

Since the exercise revolves around reviewing the ideas on the wall/whiteboard, make sure the room orientation facilitates viewing the wall. Arrange tables and chairs so they are facing the wall.

Tip #3: Make sure you have enough strips of paper.

It will take some time to cut the strips of paper. Don't leave this to the last minute as these materials are crucial to the success of the process.





ACTIVITY INSTRUCTIONS

Step 1: Facilitator Sets the Stage

5 minutes

As facilitator, you should begin by explaining to the group the purpose of this activity. Consider using the following language:

“When we identify a problem, we naturally come up with new ideas or solutions that we think will address the problem. But there are many challenges to this approach:

- 1. In many cases, the new ideas add new or additional work to our plates and we often don’t have the capacity to take on more.*
- 2. We may not fully understand what’s contributing to the problem, so we might be fixing the wrong things.*
- 3. We might create solutions that work well for one person or unit, but don’t take into consideration the needs or perspectives of others, which can make systemic issues worse and make shared ownership more difficult to achieve.*

Today, we’ll be participating in an activity that flips the script on problem-solving. We’re going to talk about X problem that we’re currently facing. Instead of getting into groups to brainstorm possible solutions, we’re going to talk about how we can screw things up even more. The goal in having this conversation is for us to identify what’s really contributing to the challenge in the first place, so that we can be more intentional in how to fix it. This is a chance for us to get out of our own way and stop adding unnecessary or unrealistic solutions that may not really be helping us long-term.”

Next, present the challenge which you want the group to explore. Challenges can be any problem the team is trying to improve or fix. **A critical element of this exercise is that the challenge in question has to be something the group has control and agency to work on and improve.**

Then ask every participant to write one example of how they can personally or through an action of their department/team make the challenge worse.

Step 2: Participants Brainstorm Individually

5 - 10 minutes

Allow participants to write down their ideas to the question prompt above. **They should NOT write down their names – their ideas should be anonymous.**

Collect each idea and place it on a wall or whiteboard. **You should collect their ideas** and post to the wall instead of having the author post it on the wall to maintain anonymity.

Don't skip the step of posting ideas on the wall. You want a visual representation of all of the things people are doing (or could be doing) that could contribute to negative outcomes.



Remind participants that the ideas they generate have to be within the realm of possibility. They cannot write down ideas so extreme as "shut down the website" or "close the office."



If you have a large group, use larger strips of flip chart paper. For smaller groups, you can use sticky notes.

Step 3: Group Reflection of Current Process

10-15 minutes

Once all ideas are posted, start reading them out loud, one-by-one. Specifically, read one idea and then ask the group:

"Is the organization doing anything that remotely resembles this or are we doing anything that is putting us at serious risk for this outcome occurring?"

Allow the entire group to respond. Meaning, the person who wrote the idea is NOT the person who needs to respond to this question. The group as a whole should provide the response.

- If the answer is YES: Keep the strip of paper or sticky note on the wall. If even one person says "Yes", the strip of paper must remain on the wall.
- If the answer is NO: Remove the strip of paper or sticky note.

Continue this process for all ideas on the wall.



If trust or safety is low within the group, consider having people close their eyes and raise their hands if the answer is yes. The “voting” for whether or not the team is doing this work doesn’t have to be public.

Step 4: Participants Vote on Most Impactful Ideas

5 minutes

With the ideas that remain on the wall after the above exercise, **ask participants to vote on which of those ideas, if addressed, will have a meaningful impact, are within their control to do something about it and are manageable to enact.** Set a ground rule that ideas can’t require additional personnel or financial resources.

Voting should happen as follows:

1. Give each participant two (2) stickers. The stickers could be sticky dots, stars, your institution’s logo/mascot, etc. The stickers should be the same for everyone participating.
2. These stickers represent votes. Each participant should place their stickers/votes next to the ideas they like the best. Ground rules for voting include the following:
 - a. Each sticker represents one vote. Thus, each participant gets two votes.
 - b. They can vote any way they want. They can put both votes on one idea or split their votes amongst two different ideas.
3. Once everyone has placed their votes next to the ideas they like best, examine what ideas received the most votes. There will likely be some ideas with more votes than others and those reveal the team’s preferences. You’ll want to note the top 3-5 ideas.

Example: If these were your team’s results, this would show the group preferred ideas #3 and #2, in that order.

Idea #1	
Idea #2	★★★★★★
Idea #3	★★★★★★★★★★★★★★★★
Idea #4	
Idea #5	
Idea #6	
Idea #7	★
Idea #8	
Idea #9	★★
Idea #10	

Step 5: Small Group Discussion

15 – 20 minutes

Organize the group into small groups of 4. Ask them to focus on the top 1-2 voted ideas from above and give them time to start brainstorming possible solutions to those specific issues. Specifically:

- If the ideas are potential things that could happen: How can they prevent these things from happening?
- If the ideas are currently happening in any way: How do they stop doing them?

Step 6: Large Group Debrief

15 minutes

Ask each small group to share out 1 – 2 ideas that emerged from the conversation.



APPLICATIONS FOR USE

This method can be used to discuss a variety of challenges – big and small – across different units and disciplines. In this way, the method is very versatile. For instance, you can use this method with any of the following prompts:

1. Our strategic plan includes improving our service excellence. How could we screw up customer service?
2. Our department is struggling with decreasing student enrollments. How could we screw this up even further and make the situation worse?
3. Student success is vital to our long-term growth and is needed for us to stay competitive. How could we screw up student success?
4. Donors we've worked with for years seem to be flocking to other organizations. How can we make this situation worse?
5. Faculty are telling us they are burned out more than ever before. How can we screw this up further?
6. We know in order to effectively use our resources and create new opportunities for our students, we need to break down silos and work more collaboratively across units and departments. How can we screw up the way we collaborate?