

# STRAIGHT SHOTS AND CURVED ROADS – A Guide for Maintaining Organizational Momentum

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Flying down the road with the windows down and the world flashing past can be exhilarating. When you are moving ahead on a straight shot, you can see ahead to where you are going and it's easy to note the milestones passed and the sights along the way. Somewhere in the journey, you will come across a blind curve. The visibility will decrease. Your senses will heighten and you will take in as much information as possible. Your way forward will not be clear. Eventually, you will round the curve and once again move forward in a straight shot. Driving an organization is very similar to this. Sometimes, the way ahead is clear and the path is obvious. In these cases, setting timelines, developing benchmarks, and determining budgets for these projects make sense. But what happens when the way ahead is not so clear? In these circumstances, a different type of planning model must be used. Here the goal is to determine the landscape and acquire the knowledge and contextual understanding that will help you round the bend. Timelines and task lists are not clearly defined for this type of problem. Both of these planning models are used in Straight Shots and Curved Roads.

Most organizations plan for organizational change as if they are going on a summer trip. We are going to visit the relatives in Minnesota. On the way, we are going to stop here, we will take a side trip to see the world's largest ball of twine there, and we will be at the relatives' house on Tuesday. In this model, we know where we are going, when we arrive, and even approximately how much we will spend. This is not the way that real organizational change occurs. In reality, real organizational change looks more like the old TV show Route 66 where two guys are on an eternal road trip having adventures and seeing the sights along the way. At best, we determine what sights and possibly what adventures we want to see and head in that direction. Timelines and budgets for this journey do not conform to regular trip planning. When one destination is reached, two more may take its place. There is no final destination, only stops along the way and the goal of the leader in the organization is to keep the momentum of the organization moving forward. Sometimes organizations lose speed and stop. In some cases, the organization can even move backwards. This change in momentum has a direct impact on organizational productivity and climate. People want to work in forward moving entities. They want to see new sights tomorrow. Although there is always some push back to change efforts, most employees want to see their organization as forward thinking and developing. So whether change efforts are moving in a straight shot or things have slowed down to navigate a blind curve, the momentum must be maintained in a forward direction.

This is not a traditional manual for how to do organizational planning. My hope is after reading this; you might find that Straight Shots and Blind Curves might replace the current exercise of annual strategic planning. This is instead, a tool to help start thinking about how to make your organization a learning organization that can deal with many complexities that traditional strategic plans fail to address.

What is the difference between strategic planning and Straight Shots and Blind Curves? Let me start with my own bias that I don't think organizations are very good at being strategic or at planning. Don't get me wrong. There are some initiatives that get carried out brilliantly. Everything goes according to plan and the timeline, budget, and final objectives all match exactly the way they were drawn up last spring. These successes can be few and far between. In most cases, problems are so complex and organizational context issues change so frequently that one initiative is actually a series of initiatives each one built upon the previous steps. The variables change so rapidly, that no plan could foresee where the road would eventually go. But isn't this what we do all the time as individuals? We process the changes that have occurred and design a new plan. Effective coaches do this during a game as well. They may have a plan going into the game but if it isn't working, they adjust and modify based upon the new input. This is learning and it can be applied to organizational behavior in exactly the same way. Put another way, when we have a straight shot ahead of us and the goal and means are clear, we can use traditional planning steps to meet the objective. But in those cases where we hit blind curves or the road wasn't as straight as we first thought, the organization must stop, study, and adjust direction based upon the new input. This process is not clearly defined and it is guided more by what we don't know than what we do. Only through using inquiry and learning can the blind curve be navigated and once again straighten out and allow for movement forward.

This is not meant to be an indictment on all strategic planning processes. To be fair, I have seen some strategic plans actually work as planned but even these instruments are somewhat clunky and unable to adapt to the dynamic context surrounding the organization. Many of these strategic plans fail from internal structural problems. Most strategic plans are designed around getting input from stakeholders and designing this input into the process and goals for the organization. I have nothing against getting stakeholder input (indeed, it should happen continuously). Large committees seldom come up with truly innovative changes. Even if they do represent various stakeholders, my experience has been that this over reliance on one group tends to minimize the direction setting focus of the governing team and sometimes narrowly focus the issues to those of highest interest to the participants in the room.

In the world of district strategic planning, all goals are equal. Keeping safe campuses, maximizing district resources, and increasing student learning performance are all equal. To be

fair, most strategic plans usually try to focus on a few key goals. However, within those goals are multiple sub-goals that take on an importance of their own. When examining most strategic plans, one is confronted with a myriad of goals across the organizational spectrum all requiring equal attention and resources. This alone is the primary reason that most people within an organization can't tell you what is important to the organization.

Another weakness to traditional strategic planning is that this type of focused goal setting is usually designed on a pass / fails system. Either one achieves the goal or fails to achieve the goal. On the surface, this seems like a good thing. Don't we want to achieve our goals and be able to measure that we were successful? This makes sense for some targets. Did we hold a professional development session on assessment? Was a new curriculum for math implemented? This gets stickier, when we go to more broadly defined objectives. Inspiring a love for reading and building greater teacher collaboration are two examples of this. These targets can be operationalized and defined by various measuring tools but sometimes the very act of measuring in a specific way diminishes the overall objective. The current reliance on state standards testing is a great example of this. We have narrowed the goals to such specificity regarding targeted improvement on that one measure that the overall goal of student learning gets lost. The same is true when we over define organizational goals through tight accountability systems. That is not to say that we don't want to identify specific actions to take and where appropriate specific measurements to assess whether the action has made a difference. The point is to allow flexibility in the system to allow for some broad, ongoing organizational change efforts to occur sometimes without focused measurement systems driving the process.

Traditional goal setting is also hampered because it is time bound. Goal setting usually occurs at the start of a new year. Although context changes on a daily basis, most strategic planning ventures do not adjust for this. My guess is that in the year that Katrina struck, The New Orleans School System probably failed to meet most of the goals identified on their strategic plan. Context, namely a giant hurricane, changed their five year plan in the scope of a few hours. Most strategic plans are not designed to adjust priorities based upon current context. Priorities between goals evolve and change even in districts that are not going through a hurricane. District leaders adjust for this context and that usually involves leaving the plan behind and they push forward. In the end, this creates the very likely scenario of well intended plan documents losing all relevance to the daily work of the organization. Organizational momentum can only be maintained by using a planning process that is short-termed, ongoing, and easily adjusts to changing context.

So with this in mind, I think it's time to change perspective. We need a new dynamic model that highlights core themes of the organization but allows for strategic reprioritizing on an

ongoing basis to adjust to current context. That is the impetus for the design of Straight Shots and Curved Roads.

## **STRAIGHT SHOTS AND CURVED ROADS**

The planning process for this model is quite simple. It can be broken down into the following three steps:

Defining the Vision

Focusing the Work

Taking Action

### **DEFINING THE VISION**

- Input
- Core Beliefs
- Key Themes

### **INPUT:**

Input from stakeholders is critical for any governance team to identify what is happening in the organization and what the needs and wants are of the various stakeholder groups. Unlike with traditional organizational models for stakeholder input, this is a process and not an event. The organization must have ongoing formal and informal stakeholder information channels that can be used to assess the organization. In the Straight Shots and Blind Curves Model, a representative stakeholder group is not required for the strategic planning process but it is essential that the governance team use stakeholder input to drive their work.

### **Core Beliefs:**

Core beliefs are the underlying beliefs about learning, teaching, and organizational behavior that drive the organization. It is essential that the governance team get clear agreement on these core beliefs because they will be the guide for all leadership actions that will follow. It is also important to note that core beliefs should be clarified to such a degree that multiple meanings or interpretations of the core beliefs are minimized. Core beliefs that are too broad (“We’re All Winners”) or even (“All children can learn”) are helpful to a point but often get interpreted to mean whatever anyone wants them to mean to prove their point. One can make

an argument that improving teacher pay is about “Children First,” and I have had one educator repeat back to me that “All children can learn, but Jesse just can’t learn that much.” We must be careful in stating core beliefs that they state something specific and that they are statements the governance team truly believes.

#### Examples of Core Beliefs:

We believe that everyone associated with our organization is a learner.

We believe that learners learn best when they have some control over their learning and the learning incorporates learner passion and has a sense of purpose.

We believe that mastery of grade level state standards designates the minimum that every learner should know and be able to do.

#### **Key Themes:**

I believe that identifying the key themes is the crucial step to this entire process. Themes identify areas of focus and help take beliefs into action. Themes can and should be relatively simple affairs that define a desired action, outcome, or area of focus. These are created by looking at the core beliefs. Governance teams often know their district’s key themes even without going through a formal process for identifying them. The proof of effective leadership is when the rank and file members of the district are clear about the guiding key themes. This is why themes are much stronger than goals or even belief statements. Everyone in the district should be able to articulate that in this district, “We are focused on learner engagement.” They probably wouldn’t be able to describe a detailed asset management goal. This is the power of this model. If the stakeholders of the organization know the key themes, the strategic plan is working. If Boards do nothing more than establish key district themes, they will do a great deal toward impacting student learning and staff behavior.

#### Examples of Key Themes:

Learner Engagement

Teacher Collaboration

21<sup>st</sup> Century Learning Standards

### **FOCUSING THE WORK**

- Guiding Questions

- Context
- Prioritizing

### **Guiding Questions:**

Guiding questions are not potential goals. They are a tool to take key themes and focus them. If a district theme is teacher collaboration, a number of guiding questions come to mind. The overarching question might be, "How do we bring teachers together for meaningful collaboration?" Related questions will arise when we start to analyze this such as, "What type of work should teachers do when working collaboratively?" Guiding questions start from inquiry and not an assumption that the answer is already known and just needs to be implemented. This is an important aspect to this model and will be replicated throughout

### Examples of Guiding Questions:

What does 21<sup>st</sup> Century learning look like in a classroom setting?

What tools do we need to support 21<sup>st</sup> Century learning?

How do we engage students in the learning process?

### **Context:**

All planning and action steps take place within a dynamic structure in every organization that I call context. Context could include resource availability such as dollars or manpower. It might also include organizational capacity for change and leadership structure. Recent events such as previous change efforts or current organizations stressors are also part of context.

It is important to review context closely because this will give the organization the tools necessary to help prioritize change issues and define timelines and resources. Because context is constantly changing, the organization must continuously review context and redesign change efforts to meet the new context.

### Areas of Context:

1. Budget
2. Personnel
3. Leadership
4. Organizational capacity for change
5. Previous organizational history with change initiatives

6. Political issues
7. Outside pressures
8. Internal pressures

### **Priorities:**

The priorities stage is the process of using context to identify which guiding questions will get the organization's focus. All organizations have limited amounts of time, money, and energy to devote. By identifying the specific guiding questions tied to key themes that should receive this focused attention, the organization has positioned itself to work on those things that are most important in today's context. Changes in context can result in a reshuffling of priorities and this doesn't have to wait until the annual goal setting exercise. It should also be noted that the organization will not be able to deal with all key themes in a structured way. Only a few guiding questions will be formalized in the action cycle but it is important that the other key themes are identified and promoted.

### **TAKING ACTION:**

Up until this step, most of the work has been done by the governance team with some support from staff in the focusing stage. Once the governance team has identified the targeted interests, the district staff then takes over. This is the part of the process where ideas get turned into action. The action cycle can be applied to overarching guiding questions or smaller sub-questions. It consists of very distinct phases. These include **Review, Remove, Rebuild, and Renew.**

**Review** - The Review step requires the organization to increase their knowledge and understanding about the guiding question. If the guiding question is, "How do we increase teacher collaboration at the site level?", then the organization needs to learn more about this area. What is the research saying on teacher collaboration? What are other districts doing in this area? What are we currently doing? Often, one question will lead to others. Sometimes review will help the organization change or revise the interest.

I was once tasked with developing a plan to reorganize student loading at five different schools to make better use of available space. One of the early plans that was put forward was to merge two K-6 schools and make one of them K-2 and the other 3-6. This plan was recommended to balance student numbers and create a better socio-economic balance

between the two schools. These were both good and appropriate rationales to make the change. The context prompting the change indicated that the economic factors were not strong enough to trump educational factors. In other words, the change didn't need to be made to solve a budget crisis and if it was going to have a negative impact on student learning, it shouldn't take place. With this in mind, our committee went to work on the review phase. Immediately research study after research study came out that showed a strong correlation between student achievement, positive student perceptions regarding safety, and increased parent connection to school if fewer school transitions occurred. By asking the right question about whether creating additional school transitions helped or hurt student achievement, we were able to get information that kept the district from making a poor decision. The information that we discovered actually created a new question regarding the impact of transitioning the schools to a K-8 design which took us down a different path.

Following a thorough investigation of the interest, the organization then needs to take the new knowledge and incorporate this into the belief system driving the change efforts. This allows best practice to become organizational belief thus leading to organizational change.

The review stage may be revisited at any time within the action cycle. Outcomes from the review stage may be further questions to investigate or the identification of specific district change initiatives that are moving forward.

**Remove –** The remove step is focused on what can be taken away from current practice to help implement the new initiative. This change may be a current practice, belief, process, or tool that in some ways hinders the change initiative. This step also can be addressed by answering a question. “What can be eliminated from our current practice to help this initiative be successful?”

**Rebuild –** The rebuild stage is where real planning takes place. This is the stage where straight shots and blind curves happen. If the change initiative is clearly focused then a straightforward change plan should be developed that identifies tasks, timelines, costs, responsible parties, and plan benchmarks. If the way forward is not clear, the plan may need to identify areas needed for further information and possible action research studies that could be conducted. Once the blind curve is navigated, and the path becomes clear, straight forward planning processes can be implemented.

**Renew –** All initiative must go through the renew stage. Did we achieve the results that we were expecting? What are stakeholders feeling about the initiative? Are there areas that need to be changed or adjusted? All of these questions must be answered in ongoing renew cycles.

Organizational change is a complex, multi-faceted process. Some change efforts are clearly defined and easily structured into traditional planning tools. Others are more ambiguous in their nature and these require the organization to respond in less traditional ways. Only through understanding how to deal with both planning structures (sometimes at the same time) can the organization stay on the right road and keep moving forward.

## STRAIGHT SHOTS AND BLIND CURVES

		<b>Responsibility:</b>
V I S I O N	<p><b>Gather Input</b></p> <p><b>Establish Core Beliefs</b></p> <p><b>Identify Key Themes</b></p>	<p><b><u>Governance Team</u></b></p>
F O C U S	<p><b>Define Guiding Questions</b></p> <p><b>Review Context</b></p> <p><b>Set Priorities</b></p>	<p><b><u>Governance Team and Staff</u></b></p>
A C T I	<p><b>Review Issues Related to Questions (Questions become Initiatives)</b></p> <p><b>Remove obstacles to Initiatives</b></p> <p><b>Rebuild Systems, Processes, Products</b></p>	<p><b><u>Staff</u></b></p>

**O**

**Renew Focus on Initiative**

**N**

**Initiative steps in the Remove and Rebuild stage will be designated straight shots or blind curves and appropriate planning / implementation tasks will be used.**