Strategy Every Day
The Power of “Agile” Teams

February 26, 2020
NAIS Annual Conference

LATIN
SCHOOL of CHICAGO
Overview and Introductions
Our Agenda

Overview
- Welcome!
- Why we are here and what we hope to learn/produce today!
- Strategy Every Day at Latin: Our story and why “Agile Teams”

Break

Facilitated Working Sessions: Your School
- Part One: Aligning Structures and Practices to Purpose
- Part Two: What might I propose, pilot or test?

Communicating Change - Launching Agile Teams
- Part Three: Taking Your Ideas Back to School

Reflections
“Culture eats strategy for breakfast.”

~Maybe, sort of...
Peter Drucker
Challenges We See in Schools

Problem: *Organizational Complexity*

**Symptoms:**

- Lack of role clarity/role coordination
- Perception of administrative “creep”
- Increase in program/functional “directors”
- Siloed leadership and execution
- Ineffective or disconnected platforms for communication; “death by meeting”
Questions We Aim to Address

● How can organizational design promote distributed and collaborative leadership around strategy?

● How can the design produce pathways for learning and leadership?

● How can design strengthen alignment, integration, collaboration, and communication - both vertically and horizontally?

● How can organizational design unleash talent and free the Head of School to focus their own time on what matters most?
Why “Agile” Teams.. and what are they?
“A bad system will beat a good person every time”

~W. Edwards Deming
1. Address Organizational Complexity

- Strategy vs structure
- Autonomy vs Control/Collaboration
- Effectiveness vs Efficiency
- Long range vs short range
- Skill vs Functional Needs
Innovation Killer Org Chart

- **Chief Idea Killer**
  - **VP of No**
    - Director of Onerous Reporting
  - **VP of Status Quo**
    - Director of Bureaucracy
  - **VP of Stay the Course**
    - Director of Rigidity
    - Director of Analysis Paralysis
    - Manager of New Growth Ideas (Vacant)

- **Chief Digital Officer**
  - **VP of Hype**
    - Director of Strategy
  - **VP of Disruption**
    - Director of Ambiguity
  - **VP of Buzzwords**
    - Director of Shiny New Things
    - Director of Overpromise
    - Manager of Business Results (Vacant)
The “How Work Gets Done” Chart

Organizational Network Analysis

Central:
- Holds network together
- Can become a bottleneck

Knowledge broker:
- Critical connection to external knowledge
- Needs to be connected internally to be effective

Peripheral:
- Disconnected, at risk of exit
- If talented, this presents a risk
2. Build “Agile Teams”

Self Managing
Collaborative
Cross functional
Accountable
Strategy-Aligned
Leader’s move between the balcony and the dance floor...

“The ability to maintain perspective in the midst of action is critical to lowering resistance... Great athletes must simultaneously play the game and observe it as a whole. We call this skill “getting off the dance floor and going to the balcony,” an image that captures the mental activity of stepping back from the action and asking, “What’s really going on here?”

-Ron Heifetz, A Survival Guide for Leaders, HBR
**Organize With Intention**

- Put strong performers on independent teams and ensure diversity in approaches and perspectives
- Provide teams with a clear focal point: the why, what, and who for their work
- Allocate resources up front (time, people, tools, etc.) then hold teams accountable
- Build means for intersections and feedback loops across teams

**Lead With Clarity**

- Define outcomes, then let teams chart their own path toward them
- Stay in the mix “scrum style”: Move between the balcony and the dance floor as you support teams and team facilitators
- Streamline “information sharing meetings” that drain time and talent; don’t get bogged down in the formal report, show and tell loop!
The Story of LEAD
Compelling vision + Clear strategy +
Organizational Clarity = Effective (and happy) Head of School
Before & After: HOS Direct Reports

2018-2019 | 16 Direct Reports/Weekly Meetings
Assistant Head of School
CFO
Director of Human Resources
Director of Lower School
Director of Upper School
Director of Middle School
Director of Studies and Professional Development
Director of Enrollment Management
Director of Communications
Director of Development
Director of Diversity, Equity, and Inclusion
Director of Student Life
Assistant to the Head of School
Director, Uptown Partnership & Service Learning
Director of Technology
Director of College Counseling

2019 - 2020 | 7 Direct Reports
CFO
Director of Lower School
Assistant Head of School
Director of Upper School
Assistant to the Head of School
Director of Middle School
Director of Studies and Professional Development
Leading up to LEAD

Why?
- HOS lacking time to manage, lead and mentor
- Feeling productive, but not efficient
- Meeting overload
- Strategy that needed talent, focus, and cross-functional coordination

What?
- Organizational Structure changes (reduction of direct reports) work team outcomes
- Changes to meeting structures
- Development of strategy-aligned, cross-functional “agile” teams
- Intentional communication
  - board/engagement of committees
Latin’s New Strategic Plan

1. Focused on student outcomes

2. Aspirational

3. Designed to avoid pitfalls of last implementation
   a. Integrated
   b. Aligned
   c. Measurable
   d. Well understood/communicated
The Story of LEAD

Latin Learner
Every member of the Latin community is a Latin Learner: students, families, faculty, staff, alumni and our partners in the city and around the globe.
The Story of LEAD

**LEARN**
Integrate, deepen and make personal the Latin learning experience for each and every person in the Latin JK-12 community.

**ENGAGE**
Focus on engaging with our families, alumni and the city of Chicago to make student learning more connected to the professional world and the communities in which we live.

**ADVANCE**
Invest in our leadership, faculty and staff as Latin’s most important assets in the development of our students.

**DEVELOP**
Enhance or redesign Latin’s campus and facilities and align resources to achieve our vision for educational excellence.
Culture shift to “Strategy Every Day”

Implementation:

- Create a strategic mindset for all
- Include as many perspectives as possible
- Offer leadership opportunities (no stipend); bring faculty/staff into administrative thinking
- Capitalize on skill sets
- Consider communication throughout
  - Where are the moments to pause? Share out?
- Gain efficiencies
  - Utilize existing groups/meetings
- **Make time for integrating, synthesizing and aligning work**
- **Reflect on and measure progress with frequency**
New Teaming Structures

LEAD Team Leaders

LEARN Lead Team

ENGAGE Lead Team

DEVELOP Lead Team

ADVANCE Lead Team

Head of School Office
Diving in: **GO SLOW TO MOVE FAST!**

**Latin LEADS Work structure**

**Organization and Orientation**

- **Set context:** ensure understanding of strategy
- **Clarify role:** what LEAD teams are / what they do
- **Move to practice:** from aspiration to operation
- **Identify outcomes:** metrics, work, resources, etc. (Systems thinking)
- **Ensure Alignment:** Synthesize, connect & communicate
LEAD Teams: Purpose

- Identify existing work
- Solicit input
- Identify gaps
- Facilitate/make recommendations for changes
- Monitor/track progress of work
- Measure success
- Report out to internal audiences
LEAD Teams: Playbook

**Who We Are**

- We place the school as a whole as priority #1
- We’re emotionally intelligent
- We’re humble
- We’re doers
- We’re inclusive

**How We Work**

- We engage in productive conflict around important issues
- We hold one another accountable to commitments and behaviors
- We operate with vulnerability-based trust
- We reflect on tasks and make sure they align with measures of success
- We create a space for and are aware of rabbit holes
- We wear our different “hats” as appropriate
Take a Break!
Working Session
Parts One and Two!
Let us know more about you...

Embarking on strategy design?
Mid- process and/or executing?
Not yet!
Part One: Aligning Structures and Practices to Purpose

- Look at your current org structures (what works and what doesn’t as it stands)
- Look at the strategic work to be done
  - Where is it helping me get the work done?
  - Where is it not?
- Solicit feedback from table top or triad

Part Two: What might I propose/pilot or test?

- What might I change and share with my team?
  - Build a strawman for how to move ahead at school: what might you change, pilot, or test?
- Solicit feedback and critique from table top group or triad
Organizational Network Analysis

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## The 4 C’s of a Coaching Conversation

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**Feedback!**
For a digital version of the worksheet, go to:


Request Access

Click “file” → “make a copy”

Get to work!
Assess Ways of Working

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Working Session
Part Three!
How Might I Get Started Back at School?

“Our biggest challenge is the time zone difference. In New York, it’s 2:45 but at our headquarters it’s 1974.”
“We looked at 180 teams from all over the company...we had lots of data, but there was nothing showing that a mix of specific personality types or skills or backgrounds made any difference. The ‘who’ part of the equation didn’t seem to matter.”

Abeer Dubey, Project Aristotle Lead, Google
No significant connection to team effectiveness:

- Colocation of teammates (sitting together in the same office)
- Consensus-driven decision making
- Extroversion of team members
- Individual performance of team members
- Workload size
- Seniority
- Team size
- Tenure

https://rework.withgoogle.com/print/guides/5721312655835136/
Feedback!

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Reflections and Insights
Resources


https://hbr.org/2016/05/embracing-agile

### Meeting Norms

- Plan a doable agenda for time allotted
- Identify roles at the start of each meeting
- Designate note taker (revolving position)
- Practice “three before me” when talking
- Leave meetings with clear, specific, active agreements around decisions--convert notes to tasks in Airtable

### Potential Meeting Questions

- Is there a budgetary consequence?
- Who are we missing in the process?
- Who has the authority? What is the decision making flow?
- Triple Constraint Theory
- Are we being SMART?
- What have we learned? What do we need to do with that information before the next meeting?
- What is most important right now?
- Who will do what?