Values & Competencies Session 4

Prepared for Communities In Schools of Central Texas

Melanie Rivera, Breaker28

Norms

- Your presence makes a difference
- Intent to build
- Grace to grow, with accountability for intentionality and impact
- The broccoli in your teeth rule (Melanieism)
  - Assume it's there, whether you feel it or not (esp. if you walk in more privileged identities and power)
- Make space, take space
- Expect and accept non-closure (@DBP)

Welcome & Connect (5 minutes)

- In chat, please share:
  - How well have you been living into the CIS Texas values of relationships, equity, and impact? How do you know?

Sustainable Excellence: *Prioritizing Sustainable Excellence.*

Sustainable Effectiveness >> All-Staff Competencies

➔ **Taking a Systems Approach.** We avoid one-off processes, tasks, and solutions wherever possible, instead seeking to create replicable structures, systems, and tools to allow for repeatable success.

➔ **Finding Efficiencies.** We evaluate our workload and the key processes we engage in for places where we are duplicating effort or choosing a more difficult path than is necessary to find an effective solution. Where possible, we propose new ways to shave unnecessary steps from processes to free up our focus for what does matter.

➔ **Setting Boundaries and Negotiating Tradeoffs.** We acknowledge that we operate in a fast-paced environment with competing deadlines and external forces that impact our internal work. We admit that we cannot do it all and negotiate with our manager and others transparently around trade-offs and priorities, in order to ensure the right work gets done in the timeline required without wearing ourselves (or our colleagues) out in the process.

➔ **Evaluating Process and Outcomes.** We engage in debriefs or after-action conversations to learn from every process or project we engage in, so that future work is even more effective.

Taking a Systems Approach

What We Mean

We avoid **one-off** processes, tasks, and solutions wherever possible, instead seeking to create replicable structures, systems, and tools to allow for repeatable success.

Solving Problems Durably, Instead of With Duct Tape!

When we're moving quickly, we can revert to temporary fixes for problems, rather than permanent solves. We know that's happening when we find ourselves solving the same problem multiple times (or facing the same situation over and over again), rather than solving once and having systems in place for when it happens again.

Have you created duct-tape solutions in your own work? Where?

Melanie Rivera

Questions to Ask

- Would I choose a different solution if I were building for the future, not just trying to solve the "right now"?

- Is this solution really getting to heart of the issue or just the symptoms?

What other questions might you ask to know if you're solving with duct-tape or really getting to the heart of an issue at work?

Finding Efficiencies

What We Mean

We evaluate our workload and the key processes we engage in for places where we are duplicating effort or choosing a more difficult path than is necessary to find an effective solution. **Where possible, we propose new ways to shave unnecessary steps from processes to free up our focus for what does matter.**

Places to Find Efficiencies

- How and when we communicate on key projects
- How we document where to find things, institutional knowledge and lessons learned
- Building checklists, tools and templates - getting things out of your head and onto paper
- Bundling approvals or getting pre-approval on key decisions with your manager or deciders, so there's not a slow-down later
- Working at the requirements vs. preferences/traditions level

Where else do you find efficiencies in your work?

Melanie Rivera   **www.breaker28.com**

Questions to Simplify the Work

1. What are the essential parts of this project? What parts are less important or essential?

2. What needs to be accomplished for this project to be successful? What secondary goals can be foregone for now, but are "stretch goals"?

3. Are there any steps in this process that seem unnecessary to you or could be shortened?

4. What parts of this project are you struggling with that your manager can offer more guidance around? What specific support could they offer?

5. If possible, how can you leverage technology or existing systems to make the more efficient use of your time?

Setting Boundaries and Negotiating Tradeoffs

What We Mean

We acknowledge that we operate in a fast-paced environment with competing deadlines and external forces that impact our internal work. We admit that we cannot do it all and **negotiate with our manager and others transparently around trade-offs and priorities,** in order to ensure the right work gets done in the timeline required without wearing ourselves (or our colleagues) out in the process.

Negotiating with the 4 Levers

The Four Levers:
- Quality
- Quantity
- Resourcing
- Timeline

Where do you struggle to negotiate with the four levels? How can you ask managers for help here?

Melanie Rivera

Sample Script

Manager name,

I want to take on this new systems improvement project and I can see it's value to the team. My concern is that taking on this project right now is going to put [goal or project name] at risk, given all the time and focus it would take to do it at the level you are looking for. From my perspective, we have four options: shrink the goals of the systems improvement project so it can happen concurrent with my current work, delay the systems improvement project until [reasonable date that would give you enough distance], delegate it to someone else, or at least delegate [aspect 1 and 2 of the project] - maybe [name] can take it on? Or rethink the timeline or success factors for [goal or project name] so that we can accommodate this new work. What makes the most sense to you?

Evaluating Process & Outcomes

What We Mean

We engage in debriefs or after-action conversations to **learn from every process or project we engage in**, so that future work is even more effective.

Key Idea: Getting to the Finish Line Doesn't Mean We Don't Debrief

Sometimes when a project succeeds or a goal is met, we move right on without thinking about how we got there. When this happens, we don't call in unsustainable practices or set guard rails not to repeat mistakes.

Was Their Impact on the Org/Their Clients The Same?

Project team 1: Delivers an incredible amount of work - mostly at a solid level. Is eager to say yes to new ideas, and sometimes overcommits - but always gets to the finish line (even if right at the buzzer). Is so busy that the sometimes don't notice what's coming down the pike and cause you/their teammates to scramble last minute to reach a big goal. Pace is frenetic, but productive.

Project team 2: Delivers a consistently high amount of work - all solid, some exceptional. Very effective at planning and communicating timelines to team members, so most are able to deliver without undue stress or postponing of their own work. Pace is quick, but sustainable. Always meets the bar, but is less likely to bring the bells and whistles - especially in busy seasons.

Melanie Rivera

If We Don't Debrief (And Save Notes Where They'll Be Acted On), Things Won't Change!

Sustainable Excellence Scenario

Applying the Learning: Scenario in Small Groups

Your manager recently shared that Senior Leadership is asking your department to take on a new initiative that could unlock real resources for the org. As a long-tenured team member whose work is trusted, your manager asked you to lead it. One problem: you're already covering someone else's role, and your own goals are slipping and you have a medical leave in a few months you can't move. There isn't really anyone else with the skills and relationships you have, but there's no way you can manage all three workstreams without serious hits to quality and your own sustainability in the role. What do you do? If a conversation, script it - what would you say?

Learning:
Reflecting on Our Practice,

Improving for the Future.

Learning >> All-Staff Competencies

➔ **Recognizing Bright Spots.** We recognize bright spots in our work or the work of our team to build on their success and replicate them in other areas.

➔ **Growing from Mistakes.** We learn from mistakes and build mechanisms to ensure we don't repeat them.

➔ **Building for the Long-Term.** We build today for the future of CIS Central TX by codifying knowledge, solving problems permanently rather than just short-term, and making difficult choices today that will pay off tomorrow - even when it hurts.

➔ **Leaning into Creativity and Innovation.** We pursue creativity and innovation, openly share our ideas, and seek opportunities for learning and improvement.

Recognizing Bright Spots

What We Mean

We recognize bright spots in our work or the work of our team to build on their success and replicate them in other areas.

Sometimes The Answers Are Right In Front of Us

Health workers went into a rural village seeking to improve health outcomes for young children. They found that in the same area, some parents had robust, healthy children and some had children who were sickly and some who died. When looking into what the differences could be, they found one seemingly small thing: in families with robust children, parents included a shrimp or two and some simple greens found foraging with the child's rice. In families with less robust children, they only received rice. That bright spot, when communicated, improved the lives of dozens of families and their children over time.

(Dan and Chip Heath, *SWITCH*)

Elevating Bright Spots in Our Work

What is one lesson in your own role that you wish others at CIS learned from and implemented? Chat me or pop off mute.

Growing From Mistakes

What We Mean

We learn from mistakes and build mechanisms to ensure we don't repeat them.

Failing Forward: Using Mistakes to Elevate Our Practice

All of us make mistakes in our work - and mistakes alone don't ensure changed practices.

Taking the time, even when painful, to deeply understand why mistakes happen and put in mechanisms to prevent repeating the mistake is what separates failing from failing forward.

Think about the schools you all work with. What's an example of a place you wish schools might fail forward more?

Building for the Long-Term

What We Mean

We build today for the future of CIS Central TX by codifying knowledge, solving problems permanently rather than just short-term, and making difficult choices today that will pay off tomorrow - even when it hurts.

Codifying Knowledge

- **Develop SOPs for the technical things you can do** so others can back you up when out, or if you find a new job.

- **Create lessons learned docs or record debriefs** so new project owners don't need to start from scratch.

- **Codify the why/theory of action** so people remember what decisions were trying to accomplish, in case we need to adjust course.

Tough Choices that Pay Off

- **Training someone** vs. stepping in to just do it.

- **Not carrying the weight** for a role that isn't yours, but providing coaching and feedback for them to hold their responsibilities.

- **Delaying your yes or moving to yes if** until you get all the info you need to start a project.

- **Being honest about your bandwidth now** vs. not delivering later, or burning yourself out and delivering poorly for months while you recover.

Leaning into Creativity and Innovation

What We Mean

We pursue creativity and innovation, openly share our ideas, and seek opportunities for learning and improvement.

Avoiding PTR (Management Center)

PREFERENCE — "I prefer updates in writing ."

TRADITION — "We do these weekly and send them over email."

⭐ **REQUIREMENT** — "All team members have the info they need to make decisions, feel connected, and collaborate."

Concrete Exercises to Think More Creatively

- Phrase as a how might we question (How might we increase student attendance in the next three months?) Avoid any disqualifications in the first few minutes (i.e. that won't work because…)

- QStorm - Set a timer and have everyone ask questions about the problem without the need to find answers to crowdsource new ways of approaching the work

- Leverage thinking hats in a brainstorm by defining roles and perspectives. Alternatively, bring different levels/voices in the room to tangle with a problem or potential solutions.

Real-Time Brainstorm Conversation about Learning

- In your breakout spaces, riff and get creative on the following question: "How might CIS Texas do a better job of supporting a culture of learning and innovation?"
- In about 5 minutes, have at least 2-3 concrete ideas to share in chat with the group.

Close out question:
What is one aha from today's session you can take into your work?