Diane Tavenner: Hey, Michael.

Michael Horn: Hey, Diane.

Tavenner: Michael, it's a really good week to tell you how grateful I am for you and our partnership. Processing through these crazy last few years in our conversations has been such a gift, and the added bonus is that I learn a lot from you. That was brought home to me this past week as we've been preparing for this episode. I just learned a ton in our collaboration.

Horn: Well, first, thank you. But right back at you, Diane. I was thinking of this recently as I taught about lean startup and discovery-driven planning to a group out in Arizona a few weeks ago, and this, Diane, no joke, was by far the best I've ever taught it, and I don't think it's a coincidence given we had just done this episode, and it was a great way to clarify thoughts and take the theory that I bring with the practical realities on the ground that you bring and make it a much more comprehensive and tangible thing for those listening. So look, here we are gearing up for another episode, though, now about innovating in schools and what it actually looks like on the ground, Diane.

Tavenner: It's so great. I'm excited for this one. And it's interesting, Michael. We usually start each episode by just naming the reason we started this podcast in the first place, which is our shared hopefulness for the future of schools as a potential bright spot coming out of the crisises that our schools, our communities, and our country have been facing over the last few years. But it occurs to me that at some likely unconscious level, a key purpose has also been to be connected, quite frankly. At the end of the day, everything we propose here that we want to have happen in schools will rely on human connection, and so while I don't think we've ever said it explicitly before, I hope one thing we might be doing here is building connection among all of the people who are like us and believe we can create the schools our children and our society deserve.

Horn: It's such a good point, Diane. And hopefully, people sense that community. I mean, I will share one more story, actually, because as you know, I like to visit schools when I can on my travels, and I was at a microschool, actually, in Arizona on this trip, and I was about to miss my flight because I couldn't get an Uber to come to this location.

Tavenner: The new reality.

Horn: A new reality, right? And I was freaking out. And one of the women who leads the microschool, she just dropped everything and said, "I'll drive you," which was so generous. But then a minute into the drive, she looked over me and she said, "You know, this is kind of weird because I feel like I've been in conversation with you and Diane on my phone for the last year or so listening to you, and now here you are with your voice in my car."

And so as listeners like her now, this year, we're going deep on how to innovate within schools, and it's not easy. I've obviously written about it and we showcase innovative school models, like Summit's, all the time, but all too often, people don't see the

continued innovation that you frankly do, Diane, in your schools and others like you do to keep getting better, some of those year-to-year incremental improvements, but some are pretty big changes with how you've always done things to be far more transformational. I mean, that's actually how you moved into the blended learning world initially and how we first met.

And so two episodes ago, you were amazing enough to share one of the pilots you all are doing at the moment to better support and ultimately retain school leaders or your EDs, as you call them. Others call them principals. And we talked a fair bit and in some depth about how to structure a pilot and what you all are doing. But the question I was left with and I want to dig into this episode is, how or why did you choose this specific pilot, Diane?

Tavenner: That's a good question, Michael, and I'm glad you're asking it so that we can unpack it. And I will confess that it's pretty intuitive for me, at least from my perspective, when you ask the question, and so I'm wondering, do you have a framework or a theory... That's silly. I know you do. So which one of those that you recommend to an organization? Just give me some structure for my reflections.

Horn: Yeah, I'm happy to give it to you how I think about it sort of as I view the book or the shelf of theories, I take one off, and we put it on and see how it fits. But it is interesting. I think one of the reasons we do this is that we're trying to take what's so intuitive to certain people and start to create some rules so more people can access it so we're not relying on intuition alone.

But for this one, the framework that I love stems from something called aggregate project planning. It's a concept that Steve Wheelwright and Kim Clark, the former Harvard Business School Dean, created, and the way I like to counsel schools through it is for them to first clarify what are their goals, like how do they measure what success looks like. And these measures, let's be honest, they can be complex and multifaceted. This isn't a for-profit operation where it's just like the bottom line, right? It's much more complicated. But the idea is that they should still be measurable in concrete specific ways and they should be time-bound so that everyone in the building or in the school community knows what success is, and that gets back to the importance of having those smart goals that we talked about two episodes ago.

From there, once you have those goals in place, then you can start to say, "What are our current gaps? How far are we away from realizing our goals, and how large are those gaps?" And to realize those goals and, frankly, close the gaps, you then say, "We're going to need to invest in a range of different kinds of innovations." And so Wheelwright and Clark, they identified in their seminal paper four types of innovations. They had support, derivative, platform, breakthrough. I could have those slightly wrong, but that's my recollection.

But we could easily just as frame them as something like, "Okay, you got your core or your incremental, your sort of routine innovations you do on a regular basis without thinking about it. You've got your derivative or what you might call your sustaining or platform innovations or something in the middle, and then something like more

transformational, for example." I will tell you, I know you all do this, because frankly, Diane, you had clarified goals for your graduates, what you wanted them to do in the world, and I know you'll talk about this later, but you also knew what your gaps were for those graduates, and that's part of what led you to launch that blended model, as I recall the story anyway.

Tavenner: Yeah. Okay. This is really fun now. That's the perfect entry. Remember last season, Michael, when I shared that I was reading leadership lessons from the Cherokee Nation by Chief Corntassel Smith?

Horn: Yeah, you bet.

Tavenner: Okay. So in my view, it's a brilliant leadership book, one that we've studied as an organization, and we use it to build our leadership capacity. The essence of Chief Smith's theory is that leadership is simple. It's knowing where you are, which he calls point A, knowing where you want to go, which he calls point B, and how you'll measure that success, then make a plan to get from A to B, and then you make a series of adaptive moves along the way because nothing ever goes to plan. So simple, right? And you just said, "Clarify your goals," which I read as point B, and define how to measure your success. Okay, check, that's in that. And assess your current gaps, which is the difference between A and B. You got to know where you are to know what the gap is. And then invest in innovation that will close that gap, which I read as the plan. And the mechanics of innovating, in your words, and you know I don't love that word so much anymore.

Horn: Yes.

Tavenner: So that sort of the adaptive plan, in the Chief's words, is really, in our language, improvement science. I mean, that's what that body of work is. So it's interesting to me that there are tons of books, articles, and theories, and in the end, leadership is really simple to conceptually know how to do, and as and I both know, it's really hard to do in practice, and so that point A to point B in real life can be really challenging.

But that might be... Well, that is a conversation for another day. The key point here is that innovation is, by definition in my book, leadership. It's not separate, it's not different. It's the core work of leading and managing a successful organization. It isn't a side project or a silver bullet. It is the work that we do every single day, and I think that might be the most important thing we figured out at Summit and what sometimes seems to be missing in other organizations who want to innovate, is they don't see it as their job, the core work, the leadership of the organization.

Horn: Yeah, it's such a good set of points, Diane. I've always loved David Gergen's definition of leadership, which is basically the same as what you just laid out, which is that leadership is the act of trying to move a group to a goal and you're doing it within a certain context. That's simple, and yet, as you said, much harder to do than to say. But I think the other piece of that is you're right, a lot of people when they "innovate," they're just throwing stuff at the wall as opposed to very strategically, "How do we improve against our goals?" And that's why innovation, I think, can get a weird or bad name, because it

becomes the throw-stuff-at-walls practice as opposed to being deliberate. So I guess on the doing note, though, Diane, can you narrate a bit of what this looks like in your actual context?

Tavenner: Yeah, definitely. Let's start with the different types of innovations, because I liked the three categories that you named. They really resonated with me that this idea of sort incremental, you called it core, the middle group, the sort of derivative or sustaining and then the transformational. And I'll be honest, Michael, the easiest for me to identify right off the bat are the transformational ones because, quite frankly, there's so few of them. In the last decade or so, I think we've undertaken two transformational innovations at Summit. I know we have. We've done two transformational innovations. The first was back in 2011, you referenced it at the top, and we're about three years into the making of the second one. And so let me just ground folks a little bit in that quick history. I think it might be helpful.

So in 2011, Summit's very first class of graduates had been out of high school for four years. The mission of our school and our organization was to prepare a diverse student population for success in four-year college and to be contributing members of society. Our mission was our point B, and it's one of the nice things about being in mission-driven organizations, is you're actually pretty clear about where you're going. And so everything we did was to move towards realizing that mission. So, of course, we were measuring college graduation as the primary way of understanding if we were meeting the mission. Now, it takes a long time to get to that moment, so I will never forget the day when we confirmed that in the first four years out of our school, 55% of our first graduates had earned a four-year college degree.

And that day changed everything, Michael. Interestingly, most people outside of our organization thought it represented incredible success because by comparison, our graduates were doing so much better than the national averages for persistence in college and four-year degrees. But we were obsessed with the 45% who hadn't earned the four-year degree. Our goal, our North Star mission was 100%, and so to us, the model we had built was not working the way we intended, so the gap starts to emerge. And I now have the language of transformational innovation, but at that time, honestly, Michael, we called it a bet-the-farm change. That was our language that we decided to undertake to tackle that gap. And we decided that if we had any chance of addressing it, we basically had to bet everything we had on a change that would do just that, and as you noted, this is Summit's first transformational innovation, which was a fundamental change to our school model that brought us into the blended world, the personalized world. It went through a series of titles.

Horn: Of names, yeah.

Tavenner: Yeah, names and titles.

The second transformational innovation is in progress as we speak. Again, it was prompted in the very same way. Three years ago, we did the most comprehensive study to date of all of Summit's alums from all of our schools, and of course, we looked at the measurement of our mission, college persistence, and Michael, the number hadn't

moved. I mean, we had a lot more graduates at this point, but the number hadn't moved, and I'm going to skip over the emotion that's involved in these situations because there is a significant amount and just say that once again, there were these mixed interpretations because there is a remarkable story of achievement there, and our model isn't meeting our intended goal or mission for our organization.

And so for us, these are profound moments in the work that we do, and in this case, the collective leadership of Summit use this measurement and all of the accompanying data and information we have to, for the first time in 20 years, change our mission. And we did that to be reflective of the current world and responsive to students and families, and we also launched a second bet-the-farm model change that is designed to close the gap between where we are, point A, and where we want to go, which is point B in our new mission.

Horn: Wow. Your storytelling, Diane, I think here is exactly what should happen in organizations, because looking to your history does a few things, but among them, it helps you identify and categorize past projects that you've done to understand how much each kind of innovation, how much each category, if you will, is likely to move us toward our goals, and once we've done that, then we can know how many of these different kinds of innovations in each of the categories are we going to need to do to actually realize those goals. What's the mix, in other words. And it's clear you've begun with the two big ones, those transformational categories. What about incremental and derivative? I'm just curious what slides there.

Tavenner: Yeah. Well, there are a lot of those, so I'm not sure I'm going to be able to categorize them all, but perhaps, let's work through a few examples, and you can check me to make sure I've got them in the right buckets. But let's start with the one we talked about a couple weeks ago in the pilot we're doing. This is the year-long cooperating ED principal pilot. In my view, that is clearly a derivative pilot. It is a next generation management structure model that's derived from years of work to improve the old model that has consistently fallen short. I think that resonates.

Horn: That lands for me as well, yeah. Because it's not a simple, we're tweaking the mix of projects and the platform sort of innovation.

Tavenner: No, no. Okay, great. I think a good example of the incremental or the core innovation we've got going on right now is how we structure our quarterly step backs. And so just in short, the school and network leaders gather on a different school site each quarter. Different people do different versions of this. We're using, basically, improvement science techniques to improve the efficiency and the efficacy of those days so that they better support our mission and goals. So that's like an ongoing incremental, it seems.

Horn: Yeah, I totally agree. That makes perfect sense. And I think it's a perfect place also for improvement science to make a real tangible impact. I also imagine more broadly, Diane, that over the past few years, you've seen dozens of things, I suspect, in all these categories that you thought you might want to change in your schools or that other educators, frankly, have reached out to you, or other leadership, and said, "We really ought to overhaul X, Y, or Z thing." And my guess is it's not a shortage of things that you

could do pilots with in each of these categories. So what I really want to know, I think, is how did you choose this specific pilot? Let's stay with the ED one, et cetera, or something to tackle instead of all those other things.

And just to further frame the question and where it's coming from when I ask it, Diane, my experience with a lot of school superintendents and principals when I talk to them is that when they list out their priorities for the school year, they end up with a list of like 30 things. And the reality is, if you have 30 listed priorities, that means you actually have no priorities because you aren't prioritizing just a couple things and making trade-offs, and that means you're not going to do all these things well. And it's actually interesting, until roughly like 1900 or so, for 500 years basically, the word priority existed as a singular word, not plural. It was only around 1900 that we made it a plural a word and allowed people to get away with having multiple priorities.

Tavenner: Fascinating. See, there we go again, learning. Super interesting. Okay, I like this question. I'm going to get a little bit nerdy here, though.

Horn: Sounds good.

Tavenner: I know you don't mind that. I hope others don't mind it. So my answer here is we use driver diagrams, and for those who don't already know what a driver diagram is and already love it, because once you know it, you're going to love it, in short, it's a tool that asks you to clearly articulate, I'm just going to use your language from before, a smart aim. It's specific, it's measurable. And it then asks you to identify the primary drivers of what will move you from where you are today to that aim. And so I just love the of simple terms of it. It's like, "If we do X, then our aim will be true."

And very rarely is a single thing will make the whole aim true, so you have a few primary drivers there. And of course, depending on how big your aim is, the primary drivers might be pretty significant bodies of work, and in that case, they get secondary drivers that you sort of do the if-then thing with that get identified. And when we do this and do it well, what we get is basically our entire strategy for how to achieve our big goal or our mission articulated and prioritized. And as a leader of schools, you read books and people tell you that you can only have a small number of priorities, and you just taught me that maybe it was only one, but most people will allow you a couple nowadays.

I will say, at the same time, I get that cognitively, it feels impossible not to prioritize 30 things. As you said, my goal, for me, leading my organization to build a well-constructed and agreed upon driver diagram is sort of the third way approach here, where I bring both of those demands on me together. Summit does a lot each year. No one, I think, will ever accuse us of not doing a lot, but it's all organized and prioritized under a clear aim, with a clear prioritized set of measurable work, and the huge benefit here is that everyone in the organization can actually see their own specific work and where it fits into the driver diagram or the strategy and how it relates and how it contributes to the aim, which maximizes resources and capacity and really does address some of that like, "Hey, can't we do this? Can't we do this?" Because you just ask yourself, "Well, where does it fit?"

Horn: Oh gosh, I'm totally getting goosebumps right now, Diane. Because Clay Christensen and Bob Moesta, I think would've called this work you're doing driving forces, is what they called it.

Tavenner: Oh, interesting.

Horn: And as I understand it, driving forces was basically what you just described and it was something that Clay was very big on before he discovered, and I think frankly got swept away with by the world, this idea of disruptive innovation. But it was all about finding root cause forces of what caused certain outcome to occur and then map backwards, "What does that mean we need to do?" and very similar to what you said. So that's all cool. I guess the question then is to figure out which of these projects appear on that almost fish tree diagram, for lack of a better phrase, that you're actually going to tackle in a given year. There are two more pieces that I think is worth going over in terms of the aggregate project planning framework itself.

So as an organization, we need to know, historically speaking, just how many of these different types of innovations do we try out as a pilot before we get a successful one. Because not everything we launch, especially, frankly, in the transformational category, is going to work or get the outcomes that we want. And then we need to ask ourselves, "What's our capacity as an organization for actually launching innovations in these different categories?" As in most organizations can't successfully try out more than, say, one transformational what every three to five years maybe. That might be even stretching it. Maybe you can do like three derivative innovations a year, I'm somewhat making this up, and maybe like 10 to 15 basic or routine innovations a year. I think Clay Christensen used to say that it's like 10% of your investment is into the transformational category, 30% is in derivative stuff, and 60% is in the basic blocking and tackling of improvements.

The reason I think that's important to know is because all too often, and I see this all the time, Diane, organizations do one of three things with their ideas and their innovation funnel, right? So again, the innovation funnels all those ideas and those things that "you should do and everyone's telling you to do," but basically, the first mistake is that leaders overcommit and execution suffers. You just can't do it all, right? The second mistake is that they don't commit to anything and they just get paralyzed because like, "Oh my gosh, we could do all these things," and they don't do anything. And then the third mistake that I often see is, frankly, that they commit to the wrong mix of these innovation types, and there's a mismatch, to your point, of driving to the aim or the goal between what they actually do and their actual strategy, and your actual strategy, by the way, is what you do, not what you say. And so you see that mismatch start to develop in route to that point B, if you will, Diane.

Tavenner: I can totally see how all three of those things could happen if you're not incredibly clear about your mission, your big goal, your aim, and how you believe you are going to get from here to there. I think we might be tapping into the moment where theory and practice miss each other, Michael. You know and understand the theory about a mix of innovations and how you can put some estimates on it and guidance, but in the end, the leaders in the organization have to take an extraordinary amount of complexity and

make sense of it in that framework, and they have to make it real and bring it to life, and I can't help but thinking if overcommitting, paralysis, and mismatching our products of not having a really strong mission aim, driver diagram, or the equivalent of the stuff that we've described, because without the clear prioritization and inherent criteria that comes from it, how in the world could you make choices, let alone good choices? I mean, it feels like I'd be betting on horses based on their names and their jockey's uniform color or something like that and-

Horn: Oh, dear. You may have just spotlighted, Diane, why I'm so bad at betting on horse racing. But continue with the strand because I think this clarification around goals and the work it takes as an organization to do that, to figure out what you're going to do is really important.

Tavenner: Yeah. I think another thing to note here is that innovation is, by definition, change, and change is, by definition, hard, that there's a reason that there's volumes about change management, which is another reason to have a clear aim theory and articulated strategy with a very compelling why, "Why are you doing this?" for everything you're doing. You have to bring the entire organization along with you because otherwise, you're just going to get all of these millions of ideas that have nothing to do with what you're doing, and what criteria are you using to make those choices?

Horn: Yes, yes, and yes. Look, and I think we probably want to talk in a future episode about how once you've chosen the innovation or pilot that you will do and those you won't, how you get everyone else on board, but for this topic of just choosing the bets you're going to make, the big thing that I think you've done is by having a very clear sense, Diane, of goals and cause and effect, like what drives the outcomes you want, in other words. That allows you basically, whenever someone comes into you with an idea, a project, or a pilot that they want to do that, "Diane, you just have to do this," you take their suggestion, and my guess is either implicitly or maybe explicitly, you sort it into the appropriate category, and then ideally, you're setting up a rhythm whereby you, as the leadership team, are evaluating all the like ideas against each other at clear checkpoints or milestones. My guess is like maybe this is the summer where you say, "Okay, what are the couple things we're going to commit to?"

By doing that, you have a discipline and a rhythm to be innovating against those goals, and by doing this, you also make sure you're not pitting, say, a transformation idea against a routine just sort of thing you would do, where the payoff, it's significantly larger for the transformational idea, but the risk and also the effort in terms of resources is it's freaking a lot higher. So it's really hard to pit those sorts of innovations against each other, which I think is what a lot of people sort of default to sometimes because they haven't built this prioritization theory.

Tavenner: If the innovations are not planned separately from the work of the organization, we can then evaluate if we have existing resources that can drive the innovation, which is most likely true for a certain number of incremental innovations, for sure. So that goes back to your sort of 60%. When you were saying that, I was like, "Yeah, that's kind of like, because you have people doing their job and if they know how to do this work, they do their job and they do it at the same time."

Horn: Right, do your job.

Tavenner: Exactly. So we often find that we need project management support for the derivative innovations. There is a little extra need in there and so that requires some extra resources, and the transformational require substantial resources that go well beyond our normal budget. And so for the last two categories, we know that we need to secure additional resources in order to bring them to life, which helps with the discipline of like, "Okay, we need to plan that out," and for us, that's generally through fundraising. But you can see that it helps us to be really clear about what are we doing, what do we expect to come from it, and why will it benefit not just us, but others as an innovation, and then, therefore, why does it deserve resources.

Horn: So this makes a ton of sense, Diane, and the resources you just outlined are actually exactly what I would expect these different kinds of innovations to require. But I guess my last question is asking you to bring us home, because I'm still a little stuck. How'd you pick the new support model for your EDs as the pilot to do out of, I don't know, how many other things were on your plate at the time?

Tavenner: Yeah. Well, Michael, well, I hope we've been able to unpack that it is more than intuition here, that I do really believe in a disciplined approach, and we've been talking about how necessary that is to do this work well. I would argue it is insufficient, though, because look, there's a human side to all of this, and I and we, our leaders believe strongly that you have to factor into these decisions, the passions, the interests, and the skills of the people who you actually have in your organization doing the work. And the best chance you have for an innovation to succeed is that it fits into a really clear strategy, has a clear hypothesis, and that the people who are designing, implementing, and living with the change believe in it, they care about it, and it resonates with them.

In the case of our ED pilot, we have extraordinary school leaders who want to be more involved in the leadership of the organization and want to continue to be excellent site leaders. The real people who are doing this work want the and, not the or of this and of our previous model, and so when we all came together around the analysis of the idea, this was the thing that put it over the top for us. Amazing, talented people believing it and wanting to do it.

Horn: I love it, Diane, and I mean, it frankly lands, right? But you all had a conversation, you made it explicit, and you brought it home. So we'll put that aside. Before we leave everyone, what's something you're reading, watching, or listening to right now?

Tavenner: All right. Well, I'm doing some work with a group that is pretty new to basically everything we talk about on this podcast. And so I'm going to revisit an oldie but goodie this week, Michael, which is Drive by Daniel Pink, a real oldie but a real goodie. At Summit, we have what we call the leadership bookshelf, which is a list of foundational texts for everyone engaging in our work, and this is one of those select texts that's on that leadership bookshelf because, quite frankly, it just so clearly lays out what motivates people and something, I think, our traditional education system tends to, sadly, completely ignore.

So one of my favorite parts of the book is at the end, where the author gives you a recap in all sorts of different forms, so from a personalization perspective, I love this. And one of the forms is a tweet that summarizes the book, and so I'm just going to leave you with that tweet, which is "Carrots and sticks are so last century." Drive says, "For 21st century work, we need to upgrade to autonomy, mastery, and purpose."

Horn: Ooh, I love it, I love it, I love it. Love me some Daniel Pink in general, but love that quote.

I've got a few things for you, Diane, because I've been sort of laid up with COVID and you get to watch a little bit. So few innings of the World Series each night, but the one I'll name is that I finished a book called Grasp: The Science Transforming How We Learn. It's by Sanjay Sarma. Until recently, he actually lived near me and leads Open Learning at MIT. He wrote it with Luke Yoquinto. And it's a book I had skimmed when it first came out, but I finally sat down to really read it and it's terrific. I think it's the best book I've read at helping to bridge the gap between what I think of as the unfortunate and false dichotomies between the so-called constructivist and behaviorist learning camps in the world.

Sort of curious how you think about this, but I think there are frankly camps that even John Dewey tried to close toward the end of his life, and folks like you at Summit or Montessori, I think, do a masterful job of pulling from the right camp at the right time, depending on the objective and context. But Sanjay and the book does just a great job, I think, grounding it in the evidence, from the science of learning from both neuroscience and cognitive science, so I highly recommend it as a read. And with that, thank you for joining us on Class Disrupted.