Diane Tavenner: Hey Michael.

Michael Horn: Hey Diane. How are you?

Diane: Well, Michael, as the calendar year winds down, I'm wondering where the time has gone. I know it sounds so cliche, but as I reflect on my experience during the heart of the pandemic, things really did slow down and now time has really sped back up and it's a little overwhelming.

Michael: I totally hear you and I confess, I still feel like I'm in a time warp in this sense, which is that part of me, I can't figure out the relationship between things that occurred pre-pandemic and during the pandemic and whatever we're in right now, I'm not sure we're allowed to call it post pandemic, but whatever this period is, and along those lines, Diane, it's hard to believe we're midway through now, our fourth season of Class Disrupted. And it's something obviously we launched at the start of the pandemic because we both believed that this massive disruption that COVID caused could really help our schools reinvent themselves to be something that serves all kids well, which just isn't right now. And this year we're trying to push the educators to do this work because it's no secret that we've both been a bit disappointed that we haven't seen more positive changes today. And we really want to help educators do this work by giving them in this season a really dedicated look at how do you do the work of innovation with schools and specifically how do you pilot well in schools with educators and students.

Diane: That's exactly right, Michael, we are talking about piloting because it really is a responsible and effective methodology for redesigning and changing our schools.

Michael: Yeah, 100%. We're going to delve a lot deeper today, but before we do, I thought it might be helpful to recap some of the key takeaways from our previous pilot conversations, just so everyone is on the same page with us. And during our second episode of this season, if you want to check out the first time we talked about pilots, we basically said, what is a pilot? And we talked through the rationale for piloting as well as key elements. You shared a summit pilot that you're currently doing around principal development, that your team and you are engaged in as a case study for the audience and to really hang a lot of these ideas around. And then during our fourth episode of this year, we asked the question of really how do you choose what you pilot, what leads to a pilot?

And we returned to your case study and unpacked all the decisions around choosing pilots using a framework that I brought to the table. And if you missed either of those episodes for our listeners, it might be helpful to loop back, listen. Frankly, I found it helpful to listen myself as I've been advising others. As throughout this year we're just going deep on pilots and each of our conversations will honestly build upon the last one. That said, let me remind folks of just a couple key concepts of things we've covered so far. First, we talked a lot in the episode about the importance of making sure that a pilot has a clear rhythm to it in which a team is testing very clear hypotheses in the model.

And then coming back at a set point might be every six weeks in your case, but it could be every four weeks, whatever someone chooses to review the results of those tests, collect the learnings, and then make the appropriate adjustments, which could mean plowing forward into a next cycle of testing and learning, could mean tweaking or what's called pivoting the model or even shelving the pilot if the hypotheses aren't burying themselves out. And then the second thing we really talked about in the fourth episode was what pilots a school chooses to do. We talked a lot about the importance of making sure that the pilots are in line with your key goals or your priorities of the school or your organization. And to make sure that frankly, schools are always undertaking pilots. You should always be innovating, but you shouldn't be doing so many pilots that your execution flags frankly.

Diane: That's such a great overview, Michael. And it really reminds me where the conversation we want to have today takes off, it's about the people of the pilots and it sits in our ongoing dialogue about this because the people really are at the heart of piloting. Honestly, before we dive in there though, I want to share an interesting update. You just talked about pivots and now I feel like I need to disclose things that are happening in our pilots. I think I may have mentioned this one, this isn't the pilot that we've been going deep on, the principal one, this is a pilot we're doing on our weekly meeting structure for all of the school and team leaders at Summit. And I think that I may have previously shared that we have a really collaborative leadership structure as you know, and we're trying to figure out how to meet all of us. There's 23 people in that group. How do we meet every week and how do we make the most out of that meeting essentially? And honestly, last week, Michael, midway through a cycle, we decided to pivot.

Michael: Wow. Well, so you've certainly told me about this pilot that you're doing, but I'm not sure if you've shared as much on the podcast as you have with me. So my recollection is that you were trying to move away from a top-down sort of what I call a ping pong leadership model. I don't know that that's the technical phrase, but it's one where you are trying to move to one where information shall we say is more distributed and shared. And you were experimenting, as you said with this big weekly standup meeting to help accomplish that. I'm curious now what hypotheses were not bearing fruit that led you to pivot in the middle of a cycle no less?

And before you answer Diane, I do want to say congrats on being able to recognize that your hypotheses were not bearing fruit and making the decision to pivot. Because all too often I find that that people think success in these pilots is justifying their hypotheses. Like, "I was right, see and so we're going to implement this," instead of realizing that true success is getting a clear answer on whether the hypothesis is right or not in the first place. In other words, it's not whether you were right, but it's whether the hypothesis was right or not. And we have clarity around that. With that said, and congrats to you and thanks for being willing to share, what in fact happened?

Diane: Well thanks for the affirmation because sometimes you can feel like you're failing when you have to pivot. And so I say that with a smile on my face, but it's really real and I think it's one of the things we need to talk about, is that's not actually failure. So I appreciate that affirmation, especially from you. And this is the pilot, you've identified it

correctly. Our hypothesis was that if we had a weekly standup meeting with all of our organizational leaders, then we could surface the priorities that everyone was working on and find really authentic opportunities for collaboration. And honestly, Michael, this is in contrast to what you're calling a ping pong, which I like, I usually call it a hub and spoke sort of model in my experience. As the CEO, what would happen is I would have all these one-on-one meetings with these folks and then I was this person making the connections between all of them of like, "Hey, do you know so-and-so is working on this? And oh, there's overlap here and connection here and you all should get together."

And it was so hierarchical, it was so inefficient. And so we're really trying to figure out how do we actually democratize the information and the knowledge and make that flow more seamlessly so that people really do see all the opportunities for collaboration and shared work without me having to sit in the middle of it or not even having to, it's just not a smart way of operating. Here's the situation though. Unfortunately the data became overwhelming that we were not on a trajectory to meet that objective. The one that we had created this design to produce.

And you mentioned you put mid-cycle, which is not a thing we normally do, but in this case, Michael, there was just an overwhelming set of information that we weren't on that trajectory, and this is a super expensive meeting. And so we just couldn't justify continuing to iterate on something where we were seeing so many struggles with just getting the right grain size of the conversation, getting everyone in the meeting to understand what was happening, getting... It just wasn't clicking and coming together and that just became really apparent. So persisting for three more weeks was not the right way to go.

Michael: Super interesting. Well, so you're in the middle of this pivot. I hope you'll share more about what happens in the future because selfishly I haven't managed as much recently, but when I do manage and step into organizations, this is one of the things I struggle a ton with. I hope you'll teach us more in the future, but you used an interesting word there to describe taking up the time of 23 people, which is, you said it's 'expensive.' And it's true, people's time is costly in a variety of ways, which is the implication of your statement.

I think it's a good way to show that no matter what kind of pilot you're doing, it's going to take people to execute it. I would love to dig in here with the question, which is how do you staff a pilot, Diane? I mean, in a school where everyone has lots of things to do and they're quite busy, how do you find the capacity for people to take this on? Because if you aren't deliberate... We know as you and I have talked about in past episodes, past seasons, if you aren't deliberate frankly the processes that you have in place that people, they'll just fall back into those patterns and they'll persist without people even realizing it.

Diane: Yeah. Michael, I think where I want to start and thinking about the people is how we conceptualize the two parallel work streams that are happening in a pilot. And we think these are happening in meetings too. So it's a common kind of framework we use. And for our purposes we use the words content and process. And so there's essentially the content of what's going on in the pilot and there's people doing that content, if you will.

In the example I just shared, there's 23 people going to this meeting and participating in a meeting, which is designed as part of the pilot of what we're going to do, but they're doing what we would call the content.

But then there's got to be people who are focused on the process, and the process being the actual act of piloting. And so these are the folks who are collecting the data, tracking the hypotheses, holding the meeting where you're actually designing, and then holding the meeting where you're doing the step back, and producing the results and the notes of that and tracking the process of the pilot while the people are in the work doing the work, if you will. And that's how we think about the two big roles that exist. In most cases, you really have to be smart and thoughtful about getting someone who's dedicated to process. And I think one of the big mistakes that gets made is you just think, "Oh, well you can do both. The people who are in it can do both."

Michael: No, that makes a ton of sense. I like that division also between content and process, it's a helpful framework. I always say if you don't have at least one person thinking about this work of innovation and how it's being done as their primary job, then frankly innovation becomes no one's job and the urgent, but perhaps less important tasks of the present always take over. But when you say a project manager or project lead, what does that actually look like for you on the ground itself?

Diane: Yeah, well let's walk through a couple of examples. For example, in this one that I was just describing, which is this meeting pilot, there's sort of two people who've been on the process in this one. One person is literally attending the meetings to simply collect data. I mean as you might imagine, this is a big meeting with a lot of data and we wanted to track participation, both verbal and written in the meeting. We wanted to track attendance. There's a whole bunch of data that we're collecting. And so we have someone who literally is there in the meeting just tracking and putting that data together and summarizing it. Another person we have in this particular pilot happens to be me. I'm in charge of the process of that pilot. I'm actually the one who's doing the step backs, doing the design, taking the data, calling people together to think about this. And in this particular case, calling for the pivot and then engaging everyone in that conversation where we ended up facilitating it and we ended up deciding to do that.

And so those are two roles in that particular pilot. In the principal, in the ed pilot that we've been talking about all season long, we actually have a dedicated project manager on that pilot. And so this is someone who's a significant percentage of their job is to be the project manager of that pilot. And so in this particular case, she is in charge of all of everything I just said, all of the data and all of the organization and the step back and whatnot. And that pilot, it's interesting as it's moving forward, I don't even know the right words for this, but it's pretty complex. It touches all parts of the organization, it intersects with all sorts of work.

And so you really need a point person, you need the rest of the organization to know this pilot is happening and that if there's questions or intersections or things that are coming up that they have a go-to person, they can go to about that. And I think it's obvious, but it might be hard to realize that when people are in the work and doing the work of the pilot, they don't have time to be collecting data and thinking about the

hypotheses. That requires someone to really zoom out from what's happening to be able to do that.

I think sometimes, I don't know, we get so weird in schools, we get so strange with our resources and we think somehow, "Oh, don't worry. The people will just be able to do those things." And what very, very quickly happens is that what they're doing in their day-to-day work takes over and they just lose it. It just falls off the plate and it's not intentional. It's just the reality of the work that we do and we see it over and over and over again. And so the way we mitigate for that is just having these dedicated roles that are focused on the concept and the process of piloting.

Michael: I love what you're doing here. For those listening, I think it's a great use by the way, of external funds also to help support these positions so that you can make sure that you have this on an ongoing way. What a great thing to write to a foundation or to use federal dollars or whatever it is toward these roles to create this capacity in an ongoing way. More broadly I love what you're doing here, Diane, because it also echoes what I've seen from the theory on how to innovate around... and there's a rich literature on this about how to have the right teams in place for the type of innovation you're doing. Without going too deep here, I'll say that I love going back to Kim Clark and Steve Wheelwright on this one. They have these theories about heavyweight, lightweight and functional teams. And the basic thing that they say is that if what you're trying to implement has no interdependencies with any other part of the organization or the school, then you can actually just innovate within your existing structures.

These are those routine improvements, Diane, that we talked about a few episodes ago. I almost always imagined the teacher just updating their lesson plan year to year. But if you want do something that you're actually going to rethink how different groups in a school or organization interact, then you need what's called a lightweight team. And this is basically you have a project manager to your point that really shuttles back and forth between teams and helps coordinate the activity. It's coordinative in nature.

And then finally, if you're really reinventing the actual resources themselves and the processes and the overall structure of what you're doing, something like what you did when you moved to a personalized model many years ago or some of what you're doing now, frankly with a pilot you're working on around the rethinking expeditions at Summit, then you need a heavyweight team where the leader is not just a project manager to coordinate the activity, but really a project leader who has the clout and is empowered to actually make the key decisions for the group and move a project forward. I almost hear what you're doing in the pilot saying like, "We're going to stop this mid-cycle. This doesn't make sense. I'm looking at the data. We're going to now do this." And that means you can take the input of a group, for example, to eliminate historical functions, make these pivots, and really create the new processes and modes that the organization is going to use going forward if the pilot's successful.

Diane: Your description of the heavyweight team makes a ton of sense and it really aligns with what we did a decade ago, as you said, when we really redesigned our whole model and with our big significant redesign the expeditions, redesign that we're working on right now. And I think it's a really good example to say that on that project we have a full-

time senior dedicated expeditions redesign project lead who is working side by side with our full-time network leader of expeditions. Note, there's a double role going on there because-

Michael: Yes, heavyweight, yeah.

Diane: ... going forward, we certainly aren't going to have the projects lead, but for this first year of implementation, we have that double role and it's a really big investment. But I think it's so critical because our network leader is immersed in doing the job of leading expeditions across the network. And so it's very natural that the pilot nature of what we're doing will fade as things get intense and he'll just start doing the work along with everyone else is doing the work. And it just happens so subtly and so quickly that before you know it, you aren't even piloting anything anymore, Michael, you're just doing a program that hasn't been fully designed or codified yet, and then you wake up one morning and realize you basically have a half baked cake. And I don't know about you, but half baked cakes are pretty disgusting if you've ever had [inaudible 00:19:26].

Michael: Yeah. I actually learned that Diane, early on during the pandemic when my kids kicked me out of the kitchen to bake by themselves, and they were five at the time, just to note. So I get it.

Diane: Well, so you know Michael, and I would argue why we very often don't get to really clear designs and models that consistently produce results. And that's a real key, a design that consistently produces results, not just because it's the founding team or the superstar group who started it. And also that can be scaled. We don't get to these things in my experience, and I suspect you have a lot of evidence to back this too, it is because it's truly impossible to scale something if you aren't clear about what exactly it is you're scaling and why. Honestly, that sounds a lot easier in practice when people start spreading whatever's happening in the pilot right in the middle of the pilot sometimes because they're excited because it's looking to be promising, and other times because they forget that they're piloting and they just think it's what we're doing now.

I mean, there are really significant downsides. Testing a design and getting it to a stable place to produce the outcomes you want is one phase. Scaling is a totally different phase, and quite frankly a completely different beast. And so I just think that this is where we often see these failed attempts to scale things because they just aren't meeting the outcomes. And what happens is it produces a real backlash against the design, which often can result in abandoning these efforts altogether. I have heard it expressed as people feeling like they have change fatigue and they don't want to try new things because it just feels like frustrating, they're spinning their wheels. Those are all things we should be very wary of and trying to guard against I think.

Michael: Really good set of points, Diane. I hope people actually frankly listen or read the transcript of this one a couple times, because you've made some subtle points here that I think are so important about the difference of piloting versus scaling and making sure you stay in a pilot, which again, in our notion is this testing and learning process that continues to happen, the moment you leave that behind, you're not really piloting something anymore. And so there's just a lot of good points here.

And then this last one you just made, I think it goes really also to this heavyweight team in particular, which is once you finally have settled on your design, you need to spend a lot of time codifying what you have built and how the people in what you're going to be doing work together, the new processes and frankly the culture itself so that you can bring this into the rest of the org with fidelity. And that can take a lot of time and patience, but it's really important to doing this work well. But maybe that's a different topic and we should leave it here for now, Diane, and we can get into that in a future episode.

Diane: Yeah, you're right. We should leave it here for now. But of course my mind is going rapid right now and I'm thinking about a couple things. One, just that phrase, go slow to go fast. And I think that that certainly is underneath a lot of what we're talking about and what you're bringing up right now. And as we open this line of conversation, I'm just thinking about scaling. It's a fun conversation. I hope we choose to have it going forward. I suspect we might, but let's hold it for now. And let me just turn to you and ask you, what are you reading, listening to or watching right now, Michael?

Michael: Oh boy. What to choose? Well, I'll go with this one, Diane, because I'm learning from you, which has been a really fun part of this. And as you know, I'll be traveling to Sierra Leone and Liberia early in the new year for a board of a nonprofit I'm on. And I am taking a page from you by learning more about those countries and the contexts and histories by reading and listening to the literature from them. And I just finished a terrific and moving book called A Long Way Gone: Memoirs of a Boy Soldier by Ishmael Beah. I hope I'm pronouncing that last name correctly. I listened to it on audio and there were just several times as I was walking the dog listening to him narrate the book and frankly just breaking down and crying, Diane, about how this world puts a kid in this position that Ishmael was put in repeatedly, and it was very sobering. What about you, what have you been paying attention to?

Diane: Well, thanks for sharing that and for reading it. Yeah. Well, at the end of each year, I like to peruse the list of best movies from the year, and there's all sorts of people curating lists at this time about that. And I like to just try to make our short family list of what we might want to watch during the holidays. And so we actually got started on that little mini list this weekend and watched Thirteen Lives. This is the film directed by Ron Howard about the rescue of 13 young soccer players and their coach who were trapped in a cave in Thailand, and folks might remember those headlines. As evidence of the nerd that I am, Michael, I was watching this movie and I couldn't help but think about schools and redesign, not obvious, because this is a very intense and inspiring film, but not generally related to schools and redesign.

But Michael, this story, which I had missed in the headlines, is really a story of literally thousands of people coming together because they're determined to save the lives of these young boys. And it literally takes all of them, it takes all their different expertise, knowledge, experience, hard work, and sacrifice all of it to save these 13 lives, which they do. And honestly, I couldn't help but wonder, what would happen if we brought together all that expertise, knowledge, et cetera, along with the urgency and the ingenuity and the commitment to redesign schools? Because honestly, we're losing kids in our schools every single day.

Michael: Well, I like the hopeful part of that of let's bring that urgency, ingenuity, and commitment. And I hope that people after listening to this episode will bring that energy as they are intentional about who they choose to lead their pilots, to reinvent schools that work well for each and every single child. And on that note, thanks again for joining us on Class Disrupted.