

Diane Tavenner:

Hey, Michael.

Michael Horn:

Hey, Diane.

Tavenner:

Michael, it's March. March is always my least favorite month in terms of running schools. Well, honestly, now that I'm thinking about it, it might just be my all around least favorite month because it's just this weird in-between month, and it always feels like really long and grindy.

Horn:

Well, like they say, it's in a lion and out like a lamb, or maybe it's the opposite, it depends, but maybe, Diane, if you had a year-round calendar or something like that, you'd just feel a bit differently in your schools. But for those who are interested in our thoughts on schools having year-round calendars, you can always go back to season one of the podcast, which just means we've been doing this a long time now because we're in our fourth season and I guess March to you is ow the pandemic has felt for many, long, grindy, and we're in this in between place. Is it over or not? Are we allowed to say post-pandemic? I will say, Diane, I still mask up on airplanes, but I also say the phrase post-pandemic. I know not everyone feels that way on either of those dimensions.

So look, this is why we're in our fourth season, because I don't think, to be clear, our conversations have been at all long and grindy, but this season we're spending a lot more time just trying to help schools innovate, and so we're doing a deep dive into what does it really look like and mean to innovate in schools, how's it different from other contexts, and why is it tricky. We don't want to just leave folks with big ideas around year round calendars or annoyances perhaps that more hasn't changed, and so today we get to go back into the question of just how do you innovate in schools?

Tavenner:

Indeed we do. And as always, I feel better already just talking to you and being reminded that a year round calendar is not a place I've gone yet on innovation and so I should really think about that, because March might look a lot different, but that's not what I want to talk about today. I am excited to be with you. I want to pick your brain on one of the pilots we've been talking about this season and doing this year, and specifically these are the two big questions that are coming up for us right now at this point. The first is how do we now take a pilot that's been successful and is working in our tests and scale it or implement it or make it sustainable? So that's the first. And then the second is how do we actually sunset the old thing we were doing that this innovation is designed to replace? And those are things we're facing right now, and so I want to pick your brain.

Horn:

I love these questions. And my observation, Diane, is that last question in particular, sunseting the old thing or really sunseting just about anything, it gives schools so much difficulty. And it's why I think anyway innovation ends up being much more about layering new things and tasks on top of old ones, which, let's just be honest, it doesn't go well for anyone. So I'm glad that you are ready to talk about this topic because I think it will really resonate with folks.

Tavener:

Awesome. Well, I'm going to dive in then, because throughout the season I've shared quite a bit about a pilot we launched at the start of the school year, which is focused on the involving role of our executive directors, lots of people call them school principals, we call them executive directors or EDs. And in the basic premise, for those who've been listening in, is that the evidence is clear. Look, the quality of a school leader is fundamental, perhaps the most important condition, quite frankly, in a school for the school to be helping students, all students achieve the desired outcomes. And so we have this hypothesis that if our more experienced school leaders became what we call cooperating EDs, and this is based on a similar model that we have in teaching where a more experienced teacher is a cooperating teacher for a new or onboarding teacher, so same idea for EDs that all of our EDs would improve, that they would do their job well, and in doing their job well have satisfaction, stay longer, everyone benefits. I'm really summarizing here obviously, but that's the basic idea of what we've been up to.

Horn:

And I'll say to me the theory of action has made a lot of sense. I love that you started it grounded in student outcomes and not just about the adults. And as we've discussed on past shows, you've been testing and learning throughout this year, and it seems like a lot of your major hypotheses have proved true even as you have iterated a bit at the margins in terms of the meeting lengths, some of these connections or things of that nature, Diane.

Tavener:

That's exactly right, Michael. And as you alluded to, throughout this year, we've been running these six week innovation cycles to pilot the structure. And at the same time, we've also been maintaining, although with modifications, the existing structure. And the shorthand for that is we have a chief of schools who sort of manages and oversees Eds. And so both have been going at the same time. But at this point in the year, we believe the evidence of success and promise for this new structure, it's strong enough to warrant moving from the pilot to implementation for next year. And that's why I want to pick your brain so we do it right.

Horn:

Makes sense. And again, I'll say upfront, it's exciting that it's bearing fruit. We've talked a lot on the show about how an organization shouldn't see the success or a failure of a pilot in and of itself as success. It's more about doing these tests in these six week cycles in your case and getting clear evidence, and then you know is it successful or failure, and that we should be celebrating. But let's be honest, it's fun when something is working that you've cleaned up. But I'm curious, what's the evidence that shows that it's working?

Tavener:

Good question. Let me see if I can unpack the evidence. I'm going to start from the small to the big, and we talked about this a while ago, during each cycle we state the hypotheses we're testing, we collect data about them, and then we analyze to see if what we learned was what was expected, or if we need to do something different next. So some of the data in this particular pilot is, at the very, very basic level, our cooperating EDs and onboarding EDs continue to regularly meet with each other. And I know that sounds crazy, but you brought up this good point at the very beginning, if that doesn't even happen, you don't have an innovation, so that's really key. And it didn't dwindle, it's still happening. So that's key. They all report that the meetings are valuable. Again, we've been iterating on agendas and

meeting time lengths and things like that, but over the year, the data points are holding true that it's valuable, that they're meeting, they are talking about the different supports and resources available to them to help them lead their schools and do well.

And again, this was a hypothesis grounded in this common experience that school principals feel isolated and alone in their work. So the idea of them having these resources supports is really key. And our hypothesis was if they didn't even know what they were or how to access them, they wouldn't use them, but if they did, they would, so that is playing out that they're using the supports that exist not only more, but in better ways and in ways that are, for the organization, more cost-effective and scalable, so that's good. And we just now have our first real data on our long-term goals of retention, so this part's really exciting.

Our hypothesis was that people would stay in the role longer because of this, and for this upcoming year only two of our EDs are not planning to return to their roles for the next school year. And it's important to say that one's not returning because she's been selected as our next CEO and is replacing me, so she's not leaving the org by any stretch, and the other very much wants to return, but has some personal family things that prevent her from doing the role full-time, but we're collaborating with her on what a meaningful part-time role could be. So that feels like some really strong longer term evidence that we're getting.

Horn:

Well, I'll say I'm sorry to hear that she is having some family things, but overall, wow, just awesome, the interim results, the long-term ones for the year. And look, I don't need to tell you this, but I think for all the questions around whether teachers are really resigning more rapidly or not at the moment nationwide, what seems true nationwide, and I think is incontrovertible, is that leaders are under enormous stress and really are burning out. It's just an incredibly hard job under normal circumstances, and let's be honest, these have not been normal circumstances, so it's been even harder. And so I'm just thrilled to say it seems that your pilot is having such an impact. Again, not just on the inner measures, but on the one that perhaps matters the most, so I think that begs the question or raises the question, where are you now on things? It's working?

Tavener:

Yeah, exactly. And at this point in the year, as you know, schools start preparing for next year, and certainly that is one of the things that we are engaged in and doing, and so we're really thinking about how we're going to implement this changed model that we've been proving out in the pilot. And our instinct is to look at every aspect and element of the pilot, which right now is sitting outside or on top of existing systems, and figure out how to integrate. And so let me just give you an example to make it concrete. We have a project lead or manager for the pilot who's been doing a lot of the designing, and driving the pilot, and the data, and all of that, but in that role also facilitating some of the work, if you will.

And so that role of pilot project manager and lead needs to go away, but what are the regular systems and roles and parts of what she's been doing, like convening the cooperating EDs as they develop and grow, which the system needs to integrate into itself so that that part continues? And the other examples of that are where are we capturing and sharing the data to make sure that we're still tracking the efficacy of this system and who's facilitating the tiered systems of supports for ED? So basically, how do we embed the work of the pilot in job descriptions, data systems, operational routines, so that it's a sustaining system? And so that's our initial instinct of how we think about going about the next phase.

Horn:

So just really important point here that I'll just jump in and make, because you know I say this all the time, everyone wants to be doing the disruptive thing, the disruptive innovation, the thing that's going to transform the world with something more affordable, convenient, whatever it is, and people, look, they've read my work, so if something I've written has been guilty of it, they think that sustaining innovations are bad. And I just can't say it enough, it just couldn't be further from the truth. And I think this is the perfect example. What you're doing is a really important sustaining innovation. It's sustaining your current trajectory of improvement, it's allowing you to better support your EDs, and thereby have better schools to better serve your students.

And if you're not doing these sustaining innovations, continuous improvement, in other words, then as an organization, you're just not going to be doing the right things for your constituents over time. And honestly, sustaining innovations should be 80 plus percent of one's efforts when we're talking about innovation. And I'll add one other thing, I was literally just having lunch with someone who was saying, "How do you sustain the innovation once you've implemented it?" Maybe a topic for an future episode, Diane, that I'm curious to hear you talk about, but I think the point is we don't put nearly enough effort in continuous improvement, and then you're tracking the data from this on an ongoing way, maintaining those improvements that you make.

Tavener:

I'm so glad you're bringing us back to that pivotal conversation we had earlier in the season, and I honestly was guilty as charged of really wanting to be doing disruptive innovation, and we talked about how some of the innovation we've done is in that category, but far more of our work is in this category. And I had the wrong mindset about sustaining innovations. And it's so ironic because I believe so much in continuous improvement, but somehow had not integrated those two concepts together and respected them in a way that I think I now do thanks to your help. So that discussion really unlocks some things for me, and it's allowed me to fully embrace this pilot and others, and now be asking this question I'm asking, is this a right way of thinking about implementing? Well, I'll take that back. Wrong way. Are there other activities we should be thinking about? Are these fruitful activities? Is there some nuance here? Anything along those lines.

Horn:

Well, I think of you as someone who's super deep on the literature and practice around continuous improvements, so I don't know if I'll say anything here that will help, but I guess on this question about of how you're doing this work of integrating and scaling it into your day-to-day operations, basically, taking it out of the pilot phase and moving it into just the way you all operate, from what you've described, it sounds like you're doing it right. You really want to codify the new thing that you're doing, really understand what are the critical processes that you're following, and so you're not just noting, oh, gee, we have a good cadence of meetings. It's like someone helps to make sure those meetings are happening and so forth. And that's what you want to be doing, what really makes it tick and work in an ongoing way, and in a sustainable way for the organization.

And once you've codified all that, then how do you replicate it faithfully so that all of a sudden what you were doing in the pilot isn't different from what you're doing in the mainstream organization and then getting different results. I will tell you, Diane, I see that often people will say, "Well, it was working over here, and then when I brought it into the internal org, it just totally flopped." And it's like, "Okay, well what did you lose when you made that switch that caused that?" Or, and this is big, what in the current organization did you not change such that it created friction with this new thing you brought in? Was it

an organ rejection, if you will? And so that means you really need to understand all of the interdependencies between the new innovation that you're bringing in and how they impact the organization, and what specifically you're going to change of how the organization does things today and what gets to stay the same.

And look, you're making some changes in the pilot, but you want to be clear about what those changes are. A, so that it ideally doesn't impact results and it does become sustainable, but B, you also have clarity so that if the data starts turning south, you're clear, we made these changes, we made these accommodations, like a scientist we can see cause and effect and maybe change something. So if I were to summarize it, I'd say, here's the place to really sweat the details and don't leave interactions between the new improvement and the existing organization to chance.

Tavener:

Super helpful. It feels like our instincts are right, but you're making me think about two really specific things we need to focus on. The first, I love the organ transplant rejection analogy, it's so visceral and useful. My sense is that a real potential pitfall is not being nearly explicit enough in articulating, socializing and internalizing exactly what this innovation is and is not, what it's designed to do, and how it works. And it's easy to see how that could just be just not get enough attention and focus and specificity. And in other words, we are really going to have to teach all of that to lots of people, and lots of people need to learn it so they understand the change. I think the other thing is a real focus on the interdependencies of all the existing systems and work streams. And we really have to be diligent about understanding every single one and truly integrating the full innovation with fidelity.

And it's just a level of thoroughness and diligence that I think people in schools often don't leave time for and devote the resources to, and really, I'm taking those things with me. And realistically, Michael, well, this work we're talking about requires diligence and discipline, it feels more proactive, positive, optimistic, you alluded to this at the start, and therefore much more enjoyable than removing the old system. And that feels to be like cleaning out the garage, and I don't know anyone who likes cleaning out their garage. It's just not a fun job. And so I'm really curious about your thoughts and insights.

And the steps we're taking on that front right now include changing roles and responsibilities of people, renaming roles so people aren't confused and reverting back to old ways, slowly removing parts of the old way throughout the spring and narrating why we're doing that and how, and then trying to track who is still using and doing the old system, and when and where and why, and then working with those folks to channel towards the new system the next time. But I don't know, I'm not feeling fully confident there.

Horn:

Well, I've got to ask, because I alluded to this in the beginning, this is what I see constantly in schools, Diane, this is the really hard part that frankly often just doesn't get done, so I hear you're not confident, but I also suspect that because you're thinking about it, you've put a lot of thought into it despite that so I'm just curious why don't you name the issues or challenges or pitfalls so that others in addition to yourself can perhaps become aware of and anticipate when they do this work? Because I genuinely am not sure that outside of policy and regulation that mandates that certain things stay around why it is that this work to stop doing things just doesn't seem to happen naturally in schools.

Tavener:

Well, let me just tell you a story of what happened literally five minutes before we jumped on this podcast. And I think it might illustrate something where I'd caught myself. So without going into detail, I

was having a conversation with a couple of our executive directors and it was about doing some work that's hard work, and that's the world we're living in right now, these are the jobs we have, and I was noticing one of them struggling a little bit emotionally. And honestly, I got off that call and my first thought was to call the chief of schools to tell her, but that is not the model, Michael, that is not the model at all, but that was my first instinct. And I think it comes out of a place of care of not wanting to see someone who I trust and love and care about and honor and respect being in a place where emotionally it's hard, and so I want to try to do something about that, but then I do the wrong thing. So I guess that's my little story that just happened.

And I think the biggest issue that I see in schools is it comes from good intentions and fear, and the combination of those two things. And I noticed that everyone in our organization wants to support and help school leaders, obviously not just school leaders, but teachers and students too, but definitely school leaders. And so if they get asked for something, they jump to do it, even if it undermines the approach we've committed to and that we have evidence that's working and probably is better than the thing they're jumping to try to do. I think the other thing I notice is how much fear plays a role in reverting to a more hierarchical approach, more from a policy or a systems level.

And what I mean by that is if something happens at a site, and by something happens I mean something we don't want to have happen, people seem to instinctively jump to thinking we have to do something to prevent that thing from ever happening again. And most of the ideas that come out are about holding people accountable, or monitoring them, or overseeing them, or giving them more training, or protecting them from making mistakes, and I don't know if those resonate as possible answers to your question.

Horn:

I need to reflect more on this, I'll say that, but I think it's interesting to hear, and I guess my immediate reaction is that, A, I think this is why it's so important to sweat these details so that you have that kind of clarity that you're talking about in the organization, not just the what we're doing differently, but why we're doing it, what's the spirit here. And B, I think this is why it's so hard to really make policy just around preventing bad things from happening either in government, frankly, or in organizations. I always liked how Coach K, the legendary now retired Duke basketball coach, he would talk about it and he would say, "We don't have rules on our team." The first time I heard that, I was like, "What? Does that mean players are out until all hours a night before a game?"

And what he talks about is instead they have standards or values or principles, or something like that, and so when a player or coach has to make a decision about what to do in a given situation, they don't have to think about this laundry list of rules and procedures and processes.

Instead, they think about the values of the organization and how do they act in concert with that. And then there's some measure of trust that has to develop that, sure, yes, people will make mistakes, but so long as it's the exception, not the rule, we don't need to create a command and control response with dozens of protocols and rules to prevent just that one thing from happening, because if you do that over and over, you end up with a pretty stultified organization that's just focused on compliance and inputs, not the values and the outcomes, Diane, that you really want to achieve. And I think maybe that's why some of these things last is people say, "We can't rip it out because, well, what if someone goes back to doing that horrible thing for the original reason we put that thing in place?"

Tavener:

Michael, I think as you're talking coach, coach K's approach really resonates. One of Summit's values is to be principle based versus rules based. And as you're talking, I'm like, "Oh, maybe that's one of the

conditions that enabled innovation quite frankly at the scale that we've had it." Well, I don't want to blame everything on the pandemic, although it's tempting, but I also think it's human nature or at least 21st century American instinct to put rules in place to prevent bad things from happening, and I feel like those instincts were put on steroids during the pandemic, and I guess I'm finding it to be a lot harder to coach people into a principle-based approach now. And what I noticed most is how much fear plays a role in people's reactions. And I told you that story about my initial reaction was to make that call. Well, I caught myself, I didn't do it, I was able to think through it, but it's harder to get people to get to that mindset place.

It's almost like the prospect of anything bad possibly happening justifies rules to try to prevent it, and it seems negligent to people to not have a rule. And I think for different people it might be for different reasons. I think some folks need a CYA so they can say, "Well, at least I try to prevent that bad thing and so it's not my fault if it happens." And that's understandable in this moment in time where people just blame everyone for everything. And I think for others, it's just a trust thing, in their minds, they don't trust others, and so they feel like they need to control their decisions or their actions or their rules. And this is going in a direction I didn't expect, Michael, I guess we've stumbled into yet one more way the pandemic has impacted us not just in the immediate term, but now in the intermediate term and potentially long term, because I think if what I'm noticing is true, it will have potentially a chilling effect on innovation and improvement in schools, which is the opposite of what we want.

Horn:

It's interesting, if I reflect on the how do you shut down things like being clear and not being fear-based seems really an important piece of that. And then we've gone to this higher philosophical plan, I think, around a societal commentary, but I think you're right, and I think the pandemic may have accelerated it, but I think it was here before. I reflect on the rise of helicopter parenting to prevent your kids from doing anything wrong, and Jonathan Hayes critique of that and coddling of the American mind. And now we have this tendency as a society to want to legislate every single possible thing that could go in any way that defies our values or our expectations of what should go on in schools or elsewhere.

But maybe here's the silver lining, which is in the parenting analogy, I see a lot of people trying to move back to some sort of more free range, if you will, parenting where kids can take risks and make mistakes and build resilience, and I see a lot of educators right now trying to break out of this tendency too. They want to create their own micro schools. They want to create their own ways of making sure that they can connect with each and every child and help them make progress in their learning. And I think that is what we need to get back to, let's focus on the outcomes we all desire and then create more trust that the individuals can figure out their ways to get good results. Then I think if we give some choice within that to families where they're empowered in some way, well, I think they'll find the folks that can help their kids make that progress.

Tavener:

I appreciate that perspective, Michael. We often talk about pendulum swinging or cycles happening, and I think what you are offering is that when things go too far in one direction, they'll inevitably either swing back or cycle back in the other direction. And it's why we keep talking about these ideas and literally working on innovation and improvement, even why we started talking about right at the beginning of the pandemic, because we believe there will be an opportunity here, and it's not 100% clear to us when that is, but we believe in it. And as we discussed in our last episode, after seeing education in other countries, it can be hard to see the progress in our own systems sometimes, but when we zoom out and look across our entire country and time and do some comparisons, the progress

is undeniable, and perhaps that's a good place to leave it today. I'll take my good reminders and my ideas and get to implementing, but before I do that, before we go, I'd love to hear what you're reading, listening to, et cetera in your, quote, non-work life that I think we've established maybe doesn't exist.

Horn:

Fair enough. Guilty is charge, but I actually have been reading some fiction books, but I haven't quite finished the two that I've been reading, so I'll share it on the future episode. But I'll go back to another book I finished on my flights back from Africa a few weeks ago, which was the book *Transcend* by Scott Barry Kaufman, and I think you know him, Diane, he certainly knows you, and he's a cognitive psychologist, and the book is a wonderful testament to restating and then refreshing Maslow's hierarchy of needs with really the latest in evidence and a deeper dive into what Maslow really was wrestling himself with about how you achieve self-actualization as a human being. So it was heady stuff, but really deeply resonated. What about you?

Tavener:

Well, I have a big smile on my face right now. I do indeed know SBK as I fondly referred to him. I love his work and have had the privilege of collaborating with him, and a lot of his work influences Summit's model so I'm so glad you enjoyed *Transcend*. And like you, I've turned my attention back to fiction for a bit, I'm reading *Cloud Cuckoo Land* by Anthony Doerr, the Pulitzer Prize winning author of *All the Light We Cannot See*, which I'm sure many people have read. And honestly, I can't yet comment on the book as a whole, here I am promoting something before I've finished it, I'm not [inaudible 00:30:41] like you, but I'm just getting started. But what I can share is reading it feels like putting on a cozy sweater and curling up in front of a warm fire. It's just such a pleasure to read a novel that is beautifully written and captivating.

Horn:

Well, that sounds like a really nice place to leave our conversation. And until next time, we'll see you on *Class Disrupted*.