e2L Strategic Vision Methodology

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Abstract

The research base for e2L Strategic Vision methodology includes organizational culture gurus, thought leaders on strategic planning, and our own experience with over 200 districts. The methodology is grounded in backwards design, design thinking and culture-based change management. The process is collaborative, inclusive and actionable. The resulting Strategic Design Framework includes a set of shared beliefs, call to action, learner profile, learner outcomes, learning framework, strategies, goals, action plans and a five-year timeline of specific results.

"Culture eats strategy for breakfast,"
Peter Drucker.

It may appear ironic to begin a white paper on strategic vision by using the above Peter Drucker quote that seems to negate strategy. However, at engage2learn we use this sentiment as the basis of our methodology for creating strategic vision. That is, we use a culture-based change management methodology in every endeavor with our partner districts to ensure that vision and strategy are actionable in the context of intentionally created culture. Therefore, this white paper detailing our methodology is grounded in another white paper entitled: The Craft of Culture-Focused Leadership, which references the triangulated research-based and organizational examples of culture-focused leadership in action. The 5 Leadership Levers outlined in that paper (Beliefs, Vision, Behaviors, Strategies, Systems) are essentially the products of our Strategic Vision design process. The 3 Techniques (Collaborate, Coach, Calibrate) that leaders must cultivate within themselves and utilize in design and implementation of the 5 Leadership Levers are essentially the building blocks of the process we use for creating Strategic Vision. Reading that white paper prior to this one will provide clarity and necessary background information.

Purpose

The purpose of establishing vision and strategy for any organization is critical to the long-term success and adaptability of that organization. Today's context requires that organizations continuously adapt and flex as the landscape shifts. Even historically slow-moving organizations, such as educational institutions, must have vision and strategy to provide an anchor as the tides change or the storms rage, and the course for learner outcomes must be altered over time. The purpose of the e2L Strategic Vision process is to engage the right people in creating long-term vision and setting actionable strategy to ensure public schools remain viable and begin to thrive as the first choice for every family. In order to fulfill that purpose, it is critical to identify which relevant educational partners and stakeholders need to be part of the Strategic Vision design process.

For most corporate entities, those roles are fairly clear: stakeholders (shareholders), leadership, employees, and customers. For educational institutions, on the other hand, the roles are blurred as the stakeholders (taxpayers) may also be in leadership, could also be employees, and will always include - but not be limited to - customers. Furthermore, the customers (families) will also be stakeholders (taxpayers) and usually overlap with leadership and employees as well. Since student attendance in schools is compulsory, the families have not always been treated as customers, but as more choices become available, educational institutions are having to compete for the customers. Then, there are stakeholders who are not customers, and since there are no explicit, immediate dividends, these stakeholders often do not readily understand the benefits of investing in public education. Therefore,

we must engage representative stakeholders, customers, employees, and leaders in the process of designing vision and strategy for our public, community schools to create thriving, sustainable educational organizations and ownership of our schools amongst all of these critical players within the current context. Creating shared, collaborative, local vision for schools is the key to the future of a vibrant, evolving community schools ecosystem.

Process

"Until you can ladder your way down from a change idea to a specific behavior, you're not ready to lead a switch,"
Chip Heath

The leaders of IDEO, an international design and consulting firm, coined the term Design Thinking, and that philosophy is at the heart of our Strategic Vision design process. As Tim Brown, the CEO of IDEO states, "Design thinking is a human-centered approach to innovation." Rather than relying upon historical data or instinct alone, design thinking constructs emotionally meaningful and functional ideas using the humanistic qualities of empathy and experimentation (2009). In Design Thinking, one looks through three lenses - feasibility, viability, and desirability - to iterate adaptable solutions. IDEO founder David Kelley states, "The main tenet of design thinking is empathy for the people you're trying to design for. Leadership is exactly the same thing - building empathy for the people that you're entrusted to help," (Pattison, 2011).

Because we understand that all vision and strategy must be designed in the context of culture, we use a human-centered design process to ensure that each district's strategy and vision are actionable. We put the student voice, the learner, squarely at the heart of the process by starting with student panels at our summits, engaging students in focus groups, and employing students on our design teams. Showcasing the student voice is one part of our human-centered design process, and it is the key to a vision and strategy that aligns to what students and families know they need in today's context.

Furthermore, another way we use design thinking is to clearly define the end game, once again in terms of learners and their learning. While businesses have a clear end game, namely revenue goals, that drive strategy, educational organizations must clearly define student learning goals or outcomes in order to have a foundation for strategy. Because the community owns the schools, engaging the community -including the students themselves, businesses, families, and school employees - in defining the vision for learning and for learners is the only actionable way to create strategy. Using backwards design, the behaviors, strategies, goals, systems, and action plans can then be created and aligned to the collaborative, shared, local vision to ensure a thriving organizational ecosystem.

To expound upon this backwards design alignment, it is important to note that an organization will value what it measures. When educational institutions set vision, strategy and systems but allow other entities outside of their organization to control the measures by which the organization determines effectiveness and accountability to stakeholders, the system is set up for failure. As Peter Drucker famously said, "You can't improve what you don't measure." In fact, the metrics surrounding any organization, whether in business, government, or education, drive the actions of its leaders. This phenomenon is one reason that culture trumps strategy. If the systems for reward and recognition are based on measures that are misaligned to the vision, people will naturally act in ways that lead to rewards and recognition. More simply put: measure what you value because you will value what you measure. Conversely, when an educational organization designs shared vision and collaborates with the local community to also create measures of effectiveness aligned to that vision, then the

organization has a clear path to success, and the people within the organization enact behaviors that lead to both personal reward and recognition and also align to the vision of the entire organization.

Product

Finally, the tangible result of the e2L Strategic Vision design process is a Strategic Framework, within which all educational partners can make decisions that will ultimately lead to the shared vision. The Strategic Framework includes a set of shared beliefs about learning and education, a Call to Action or Vision, a Learner Profile, Learning Outcomes, a Learning Framework, Cultural Tenets, Strategies, Action Plans, a 5-year Timeline of Objectives, and a Community Accountability framework. You can learn more about this in another e2L white paper, titled "The Craft of Culture-Focused Leadership."

The Strategic Framework for each organization is designed in collaboration with the community; once created, it must be communicated widely to all local businesses, families, employees, and leaders. Making the Strategic Framework, which will be branded during the design process, accessible and transparent to all community members is vital to an actionable implementation. Ideally, the design team members who created the framework become the ambassadors of the framework to others within the organization and community. It is also important to do an annual review of the Strategic Framework. Engaging in the technique of strategic abandonment provides the structure for ongoing updates and creates the space for change, iteration, and implementation. Lastly, the term "framework" is used intentionally, because it is the very process of communicating and collaborating which becomes the true catalyst for a thriving learning organization.

In conclusion, education leaders who want to intentionally create a culture of high performance must first engage the local stakeholders in a process to set the shared vision for the district. If stakeholders come together to discover shared beliefs, define the vision, and create strategy, the resulting Strategic Framework will be actionable and guide the district for several years. As Peter Senge states, "Vision without systems thinking ends up painting lovely pictures of the future with no deep understanding of the forces that must be mastered to move from here to there," (1990).

Resources

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