Unity of Effort
in a Positive Direction

Performance Development Manual

for Educators

Excerpt
Introduction and Part 1, Section I

Organizational *ESP*

Excellence on the **S**ame **P**age

A T.A.L.K. Associates Project

by

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Organizational ESP for Educators
Unity of Effort in a Positive Direction
Performance Development Manual

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SECTION I

FUNCTIONAL KNOWLEDGE

Unity of Effort in a Positive Direction
Performance Development Manual.
Presented by **T.A.L.K. Associates**

Introduction

Jan Carlzon (1987), former president of SAS Airlines, referred to every interaction with a customer as a "moment of truth". He said SAS Airlines has "50,000 moments of truth a day". The power of those statements resonates with me today, reinforcing the importance of meeting or exceeding customer requirements and expectations, everyday. Those of us who work for organizations that provide products or services to others have one thing in common: customers or students experience our efforts, either directly or through others. As educators we are a part of every moment of truth regarding students, even if the student is out of our sight. The primary direction of educational organizations is student success and growth. Our primary role is to unify our efforts in that direction. Our students require accurate and successful performance and delivery.

The success of an entire organization can be impacted by how well relationships, performance and morale work together. In the early 1990's, in a conversation with a colleague, I remember saying that performance is most important in an organization, even in life. My friend said, "Performance is only part of it. People need to be recognized. They also need to have opportunities". That conversation expanded my thinking to understand that those who work in the same place have working relationships that may impact performance. Then I thought that when I like my job or I like my working conditions, my morale can also affect my performance. After categorizing relationships, performance and morale, I learned that our **human activity** at work is in one of those three categories. I call them the RPM's of the workplace – the realities of human activity (functioning and interaction). Relationships, Performance and Morale work together best when they are the bi-product of the workplace. Rather than doing them, we experience them. They are the result of what happens. What needs to happen in the workplace for the RPM's to receive consistently high marks from everyone?

Relationships, performance and morale (RPM's) are often and appropriately thought of separately in matters of the workplace. There is any number of times on any given day when one requires more attention than the other. Imagine taking on the roles of making relationships, performance and morale work together in a way that we can have the very best performance and delivery so that we can meet or exceed the requirements and expectations of those we serve. Here are simple workplace descriptions of each:

Relationships – The ways that two or more people or groups interact together
Performance – Efforts of participation; the measures of outcomes or efforts
Morale – The degree of motivation to perform, participate and interact due to willingness, liking, enthusiasm or dedication

The best way for the RPM's of an organization to work together is for each of them to have the same focus: students meeting or exceeding grade level requirements and expectations. As you categorize the *human activity* of your organization under relationships, performance or morale, make sure that the focus is on the student. Always make the student a part of the 'reason why'.

Imagine that you have cups in your organization that are filled with servings of relationships, performance and morale. CUPS in an RPM context is an acronym for **C**oncentrate, **U**nify, **P**osition and **S**ustain – the formula that keeps Relationships, Performance and Morale working together. The effectiveness of your organization depends on how well the RPM's are stirred together. To fill the CUPS, below are the actions that everyone in your organization can take to cause the RPM's to work together in the direction of the student. They are the topics of this course which prepare you to use skills and approaches to 'rev' up the RPM's of your organization.

Part 1 – Concentrate RPM's on student-focused delivery (Page 7)

Part 2 – Unify RPM's toward a shared student-focused vision (Page 17)

Part 3 – Position RPM's in a Consistent Positive Direction – the direction of the required or desired successes (Page 43)

Part 4 – Sustain an RPM Climate of Interaction for student-focused success (Page 53)
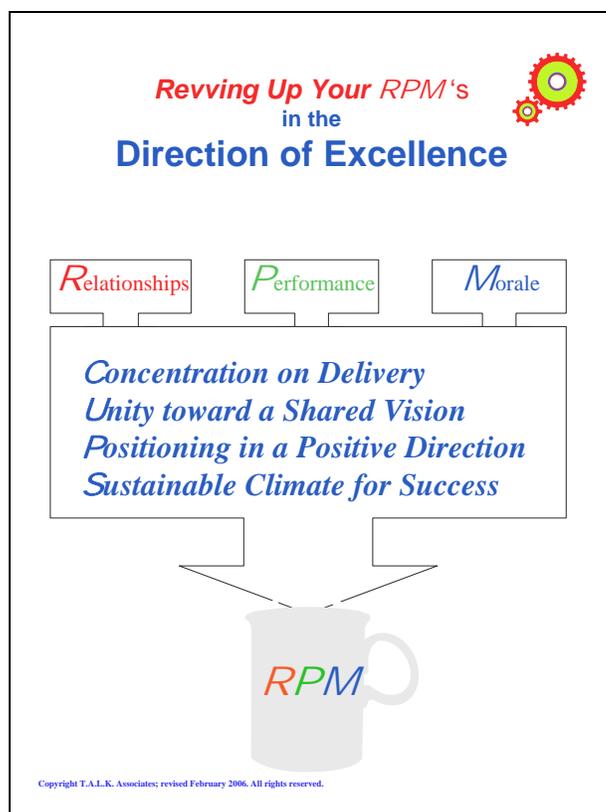
Relationships, **P**erformance and **M**orale work together

The framework for this human activity is called "Unity of Effort in a Positive Direction". It is designed for Relationships, Performance and Morale to work together to concentrate on supporting front line performance and delivery in a way that the front line can have the very best performance and delivery so that students can have the very best education and experiences.

The Unity of Effort in a Positive Direction framework (Unity of Effort framework) can be applied to any organizational structure or strategy as long as there is a customer, client or student that is served by that organization. It is best applied to organizations of 15 or more employees. It can be initiated and implemented at any management level in which there is a titular leader, from the principal to the superintendent.

In a Unity of Effort framework, 'excellence' is the accurate and successful effectiveness, efficiency and execution of tasks, always in the direction of the student. Many organizations possess a high degree of excellence among their employees. Often the excellence of many goes in different directions. There are also different levels of excellence – some employees are better than others. When the organization endeavors to correct or protect the excellence of a person or task, the direction may still exist. Getting all of the excellence in the same direction makes it easier to make the correction - *first the direction; then the correction*. That increases the assurance that the correction will be made in the direction of the student.

The Unity of Effort framework is best managed by "Synchronizing the Direction of Excellence". The Direction of Excellence includes three components:
- The Direction of Concentration – Everyone knows where to concentrate his or her efforts
- The Direction of Support – Delivery of services and products to meet or exceed internal support requirements and expectations so that front line educators can provide the very best education for students to meet or exceed grade level requirements and expectations
- The Direction of Focus – The student always being a part of the 'reason why'

Such excellence involves everyone: leadership, finance, HR, logistics, quality, front line, food service, technology and more. Imagine the entire organization with excellence in the same direction.

Section I of this manual includes four parts that introduce you to your participation in a journey that connects your entire organization to what it can do best: deliver superb service to your students. It adds the dimension that logically and affectively unifies everyone toward the success and growth that your students deserve – **DIRECTION**.

Section II provides connections to the organization's identity in a Unity of Effort framework. The Points of Concentration, the Critical Areas for Success, the Direction of Excellence and Data-Based Decision Making help everyone to know where to pinpoint targets of improvement, innovation and intervention.

Section III provides the major skills and approaches of a Unity of Effort framework in detail. In your Learning Checks you may be referred to them for clarification, understanding or answers.
- Using the Core Questions
- How to Synchronize the Direction of Excellence
- Internal Partnering for Student Success
- How to Conduct a Meeting-before-the-Meeting
- Addressing the System First
- Using the Positive Direction Power Principle
- Using the FITS 4 Success
- Using the Decision-Making Round Table

Section IV concentrates on team excellence and leadership excellence in a Unity of Effort framework. It is particularly designed for team development and multilevel leadership curricula.

Appendix 1 provides forms called Report Supplements that can be used to accompany reports and summaries with useful information concerning impact on front line performance and delivery.

Appendix 2 shows sample Direction Check Performance Level outcomes (See Direction of Excellence).

Appendix 3 provides the core skills and approaches of Consistent Positive Direction for anyone who still needs to learn them. Consistent Positive Direction is an integral part of the Unity of Effort framework.

Appendix 4 helps leaders to access their abilities to influence even higher levels of performance, success and virtue.

The repetition in this manual is intentional. It helps the reader to use and manage the language and consistency of the 'Unity of Effort in a Positive Direction' framework with increasing excellence.

Learning Check - Introduction:

1. What does RPM stand for in the title of this workbook?
   a. Revolutions Per Minute
   b. Relationships, Performance And Morale
   c. Random Performance and Morale
   d. Reliable Pack Mule
   e. Rotating Program Methods

2. Unity of Effort in a Positive Direction is a framework in which RPM refers to:
   a. The building structure of an organization
   b. The human activity of an organization or team
   c. The rotation of an automatic pulley
   d. The rotation of an information technology cycle

3. In a 'Unity of Effort in a Positive Direction' framework it is important to synchronize the direction of excellence. Excellence is the accurate and successful:
   _____
   _____

4. The Direction of Excellence includes three components. What are they?
   _____
   _____
   _____

5. In a 'Unity of Effort in a Positive Direction' framework, what does everyone concentrate on supporting? Be specific.
   _____
   _____
   _____

Organizational ESP for Educators
presented by T.A.L.K. Associates
Part 1
Everyone *Concentrates* on Student-Focused Delivery

From the introduction, you learned that 'CUPS' in the RPM (Relationship, Performance and Morale) context is an acronym for **C**oncentrate, **U**nify, **P**osition and **S**ustain – the formula that keeps the RPM's working together. Remember we said that the effectiveness of your organization depends on how well the RPM's are *stirred* together.

Concentrate RPM's on supporting front line performance and deliver – Part 1

Unify RPM's toward a shared student-focused vision – Part 2

Position RPMs in a *Consistent Positive Direction* – Part 3

Sustain an RPM climate of student-focused success. – Part 4
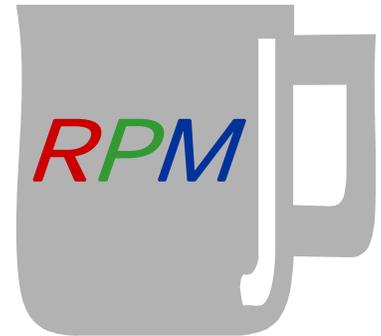
To fill the CUPS, we begin with Part 1: Everyone *Concentrates* RPM's on Student-Focused Delivery. This means that *everyone* in the entire organization concentrates on supporting the performance and delivery of the front line – those who have the direct tasks to deliver products and services to customers/students. For example, in a restaurant it would be the waitress or waiter; in a manufacturing organization it would be a finished product machine operator and a sales representative; in public transportation it would be the cab, bus or train driver and the customer sales representatives; in human services it might be the case manager or treatment specialist; in education it would be the classroom teacher. Imagine every person in the organization knowing that one of the most important parts of his or her job is to concentrate everything he does on supporting front line performance and delivery, in a way that the front line can have the very best performance, so that students can have the very best education and experiences.

The organization is divided into two main categories, the 'front line' and 'everyone else'. We call 'everyone else' the organization's Smooth Operating System, abbreviated Smooth OpS. The Smooth OpS includes leadership, maintenance, food service, quality, medical, internal transportation, human resources, finance and other support services. The biggest part of their job is to make front line people great. **The front line is the organization's 'Point of Concentration'**.

The Nucleus
The entire organization concentrates on supporting
front line performance and delivery

Front line performance and delivery is supported by:

Leadership   Excellence   Custodial   Medical/Health   Administrative   Transportation   Maintenance   Food Service   Technology

A Smooth Operating System – *Smooth OpS*

After attending an RPM session, an employee of one of my clients said, "If it weren't for us, the front line wouldn't be able to do their jobs…" She understood that the support employees were just as important as the front line. It is what the Smooth Operating System does that makes the front line employees most effective – increasing front line capability for high performance delivery. Therefore, it is important to know what helps to make a Smooth Operating System most effective. For example, how should organizational changes be handled?

When significant changes are planned or made in policy, practice, standard or procedure, two questions can always be asked. They are called **Organizational Core Questions (Detailed on page 83)**:
➤ "How does this impact our front line performance and delivery?"
➤ "What support does the front line need for successful performance and delivery?"

There is a third optional question that can be asked, "What support does our Smooth OpS need to best concentrate on supporting front line performance and delivery?"

Most important, after these questions are asked, *get the answer*! Then you will have sufficient information to process the answer and take appropriate action(s).

There are two concerns that many organizations have above all others: effective communication and effective supervisory leadership. Asking the Organizational Core Questions and getting the answers improves both.

Many times, front line employees are the last to learn about organizational changes. Yet, the working day of the front line is most critical to delivery and student growth and success. Therefore, learning the impact on front line performance before a change is made, can help to make adjustments that can save thousands, even millions of dollars. Asking the core questions first and getting the answers is one of the most cost

effective RPM enhancing habits that an organization can develop. This should be a part of every leader's standard. Best of all, it will help the organization's student-focused delivery to be increasingly accurate and successful.

In counseling, directing and personal or professional development situations, the **Direct Core Question** is asked: "What support do you need to…?"
➤ "What support do you need to be on time from now on?"
➤ "What support do you need to continue your outstanding performance?"
➤ "What support does the team need to finish on time?"

Remember, after you ask the question, *get the answer*, analyze (process) the answer and then act on it!

Unity of Effort **in a Positive Direction**
Core Questions

Organizational Core Questions
■ **What is the impact on front line performance and delivery?**
   Get the Answer!

■ **What support does the front line need for successful performance and delivery?**
   Get the Answer!

Direct Core Question
■ **What support do you need to…?**
   (to an employee or group)
   *Get the Answer!*

When getting the answers to a Core Question, it is essential to just listen instead of responding right away. That will give you time to get all of the answers instead of spending time on any one of them. You must also prepare yourself to hear whatever answers you get, whether you like them or otherwise. If an answer makes a lot of sense, it may be easy to process and act on it. If an answer makes little sense, it may be an indication that the respondents need more clarification, training or other remedial action. In either case, take the time to process the answer(s) before taking action, whether you have one month, one day or one hour.

When an organizational or team change or directive is mandatory and _must_ be implemented by a certain time, three questions can be asked in a process called the **Meeting-before-the-Meeting** (detailed on p. 92). For example, an organizational directive may be that "all organizational branches must conduct a fire drill at least once a month". The primary purpose of the 'Meeting-before-the-Meeting' is to ask _ONLY_ three questions in a way that the organization can best support front line performance and delivery when the mandatory change is implemented and thereafter:
➤ "How does this impact our front line performance and delivery?"
➤ "What support does our front line need for continued successful performance and delivery?"
➤ "What support does our Smooth Operating System (Smooth OpS) need in a way that it can best concentrate on supporting front line performance and delivery?"

A Meeting-before-the-Meeting is *ONLY* conducted in response to a mandatory directive or change. It can be conducted by anyone at any level in the organization. For example, a safety compliance directive may be promulgated. A member of the organization's safety team can convene a Meeting-before-the-Meeting. That person and designated meeting participants would exercise the initiative to act on the answers by

making authorized adjustments or by advising appropriate leaders on the best actions or adjustments. It works best when it is conducted by a leadership team or a leader and those who report to him. Every leader should be adept at conducting a Meeting-before-the-Meeting. Even though the change will be implemented anyway, the answers will help to make accurate workplace adjustments. Like the Core Questions, after you ask the questions, *get the answers*, analyze the answers and then act on them!

Core Questions and Meeting-before-the-Meeting

After asking each question:

Get the Answer
A-
Analyze the answer
A
Act on the answer
A+

For significant changes in policy, practice, procedure or standards

Get an A+ every time!

Act Ask Analyze Answer

Core Questions

Unity of Effort

Meetings before the Meeting
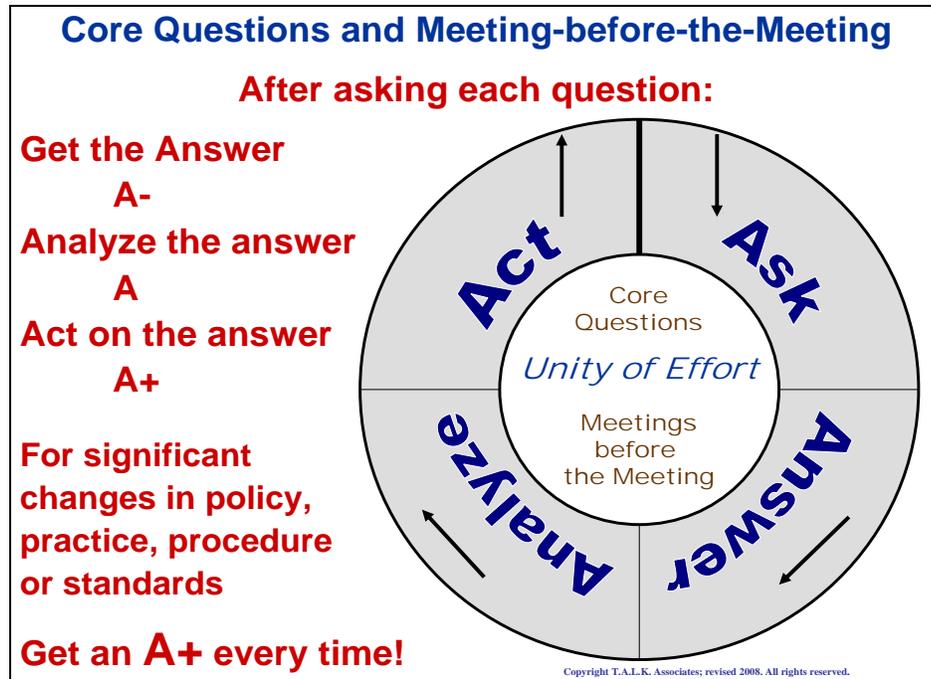
The Core Questions and the Meeting-before-the-Meeting contribute to establishing effective and accurate communication throughout an organization. They also help an organization to *consistently* concentrate on supporting front line performance and delivery.

In a Unity of Effort framework the Concentration of Effort involves the completion of tasks. **The TEAM NINE Approach** increases the assurance of accurate and successful completion of tasks. It includes:

- Establishing Clear Goals, Objectives and Tasks
  - o Time Period
  - o Student-focused
  - o S.M.A.R.T. (Specific, Measurable, Achievable, Reality-based, Time bound)
- Communication and Information to accelerate progress
- Support for individuals and teams to perform and deliver
- Accurate & Successful Delivery (meeting/exceeding student requirements & support requirements)
  - o Accuracy (Getting it done right)
  - o Success (Getting it done)
  - o The Power of **AS** (**A**ccuracy and **S**uccess)

In a Unity of Effort framework the Core Questions, Meeting-before-the-Meeting and TEAM NINE Approach are key leadership practices. For leaders, it is suggested that conducting Meetings-before-the-Meeting be included in organizational policies.

Conclusion Part 1

The phrase 'student-focused' simply means that the reason for relationships, performance and morale (the human activity) to work together is the student –students successfully meeting grade level requirements and expectations. Having the student as the 'reason why', should be a consideration of every workplace interaction. Therefore, everyone *focuses* relationships, performance and morale on the student while they *concentrate* their efforts on supporting front line performance and delivery. Remember the *front line is the organization's Point of Concentration*.

Part 1 introduced the Concentration of Relationships, Performance and Morale (RPM's) on front line performance and delivery. It also showed practices that we all can use to keep that concentration in the direction of the student. Remember the emphasis is on *direction*. Part 2 addresses organizational unity. You will learn what is most essential to unify the RPM's of your organization.

Learning Check Section I, Part 1

1. In a Unity of Effort framework the organization is divided into two parts. What are they?

_____

_____

2. In a Unity of Effort framework, internal support employees are a part of the organization's (best answer):
   a. Smooth Operating System
   b. Front Line
   c. Customer base
   d. Points of Concentration
   e. All of the above

3. In a Unity of Effort framework, what is the abbreviation for 'Smooth Operating System'?

4. In a Unity of Effort framework, administrators are considered to be front line. True or False; circle one.   **T   F**

5. Generally speaking, which of the following positions would be considered front line and which would be considered Smooth OpS?

HR Manager   _____

School Teacher   _____

Sales Person   _____

Superintendent   _____

Maintenance Technician   _____

Custodian   _____

Customer Service Rep.   _____

6. In your current employment, what is your job or assignment?

_____

In a Unity of Effort framework, would you be front line or Smooth Ops?

_____

7. In a Meeting-before-the-Meeting, how many questions are asked? Circle one.
   a. Four
   b. Three
   c. As many as you want
   d. Two
   e. One

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