Application to the Premier's Board of Education Award for Innovation & Excellence in Education

Living Sky School Division No. 202

Reimagining Living Sky

A Story of Organizational Transformation

Submission Date: September 29, 2023
Board Chair: Ronna Pethick
Director of Education: Brenda Vickers

NOTE: Larger versions of tools and reference materials included in the report can also be found in the addenda.

Background

Transformation implies a profound change in form, structure and/or character. It is the emergence from what we were to something radically different.

Living Sky School Division is committed to continuous learning and growth. As an organization, it is imperative that the system can ensure excellent service to students now, by managing the present circumstances, and in the future, by creating structures that allow us to innovate and take our service delivery to the next level.

It was spring, 2020. Once again, we were facing external factors that affected our division and education more broadly.
- Funding was decreasing.
- Parental expectations were changing.
- Mental health needs were increasing.
- The rural population was declining…
  … and then came COVID 19!

> **The greatest danger in times of turbulence is not the turbulence - it is to act with yesterday's logic.**
> **- Peter Drucker**

In response to these external factors, we found ourselves…
- …reacting to crisis after crisis.
- …struggling to piece together a budget every year.
- …working harder than ever to complete more work with fewer people.

BUT…

During the pandemic, we had to adjust many of our practices, and some provided better service to our students than those that had been in place prior to the upheaval. We realized how much we could adapt in a short time when we had to. The value of being flexible and innovative was clear, and we started to wonder what else could be possible.

So, we met with the board. Together, we reflected on the difficulties we had been facing, especially since 2017. In the end, the choice was either to manage the system as we had been, or to lead the organization in a new direction. Following Churchill's advice, we decided not to waste a good crisis!

> **Never let a good crisis go to waste.**
> **- Winston Churchill**

Our mantra became, "It is not possible to do the same with less and get more, so we have to do something different." If we wanted to ensure that our system was able to offer excellent service to students both now and in the future, it had become necessary to consider a radical change in the way we operated!

Getting Started

We took a close look at EVERYTHING. We were good people doing good things, but as a system, were we as coordinated and productive as we could be?

1. We had a bland set of values that were written in policy but really didn't inform behaviour.
2. Jobs were not always well-defined, and because of cutting staff over time without adjusting service delivery, we had more than a few "shark-horses."
3. Employees talked more about putting out fires than about being strategic. Everyone was working hard, but we sometimes seemed to be on a treadmill.
4. We worked largely in siloes, which led to a narrow perspective about problems and solutions; there was little cross-functional teamwork.
5. Meetings to sort out problems could last for hours.
6. Sometimes it didn't seem like our priorities were completely aligned.

We wanted to create an organization that was highly engaging for staff and highly effective for students. We knew as leaders, the change would have to begin with the Board and Central Services. After all, we shouldn't ask others to do something we weren't willing to do ourselves. We hunkered down and began the journey to making the organization the best it could be.

We began to read, listen, learn and research to come up with a plan. We even partnered with an external expert in organizational design.
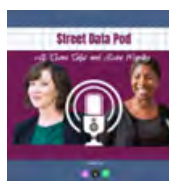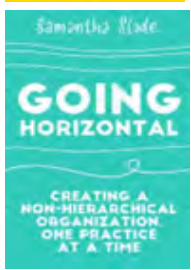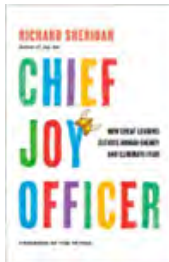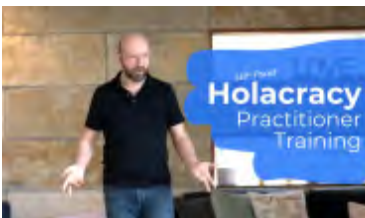
- **Chief Joy Officer:** Good leaders make more leaders. Judge your performance not on whether people are doing what they're told, but whether they're developing independent leadership capacity.

- **Street Data Podcast:** Good data is not just "big" data. Street data tells us that what is measurable is not the same as what is valuable.

- **Going Horizontal:** Horizontal is not flat. Functioning in a more horizontal and participatory way creates a LEADERFUL organization where each person is in their full potential, no matter their role.

- **The Coaching Habit:** Coaching is an art, and it's far easier said than done. It takes courage to ask a question rather than offer up advice, provide an answer or unleash a solution.

A Key Resource

Much of what we were reading discussed, in various terms, a "new" organizational model that would engage staff and get results for students. Frederic Laloux's book, *Reinventing Organizations,* was a key resource. We put several of his ideas into place:
- Following an advice process to ensure efficient decision making.
- Putting decision making on everyone's shoulders.
- Designing a recruiting process that supports our culture.
- Making purpose the glue of the organization.
- Providing room for people to bring their whole selves to work.

It was time to make a move away from Amber!
This was going to be deep, foundational change; it would not be cosmetic. This was going to be a new paradigm, not an incremental tweak to our current model.

What is a 'shark-horse?'

Favourite Food:
Core service work time

Biggest Weakness:
A clearly defined position mandate

Main Habitat:
Organizations that have downsized or are going through a redesign

A *shark-horse* position is one that feeds off of other positions. When a position is not filled after someone retires or leaves an organization, the work that person did still exists, so it gets divvied up among other roles.

A *shark-horse* position is created when a role takes on so many left-over tasks from other roles that it stops an employee from being able to perform the duties necessary for the organization to succeed. These key duties are called core services.

Employees in *shark-horse* positions may find it very hard to manage their time and may be heard saying things like *there just isn't enough time in a day to get all my work done!* or *I spend all my time just putting out fires!*

From Amber Toward Teal

Frederic Laloux wrote about the evolution and history of organizations. He used different colours to classify various organizational paradigms – their practices, management models and cultures – over time.

Laloux believes - and all the Central Services staff and school-based leaders who completed our questionnaire agree - that schools and school divisions operate largely in accordance with Amber principles.
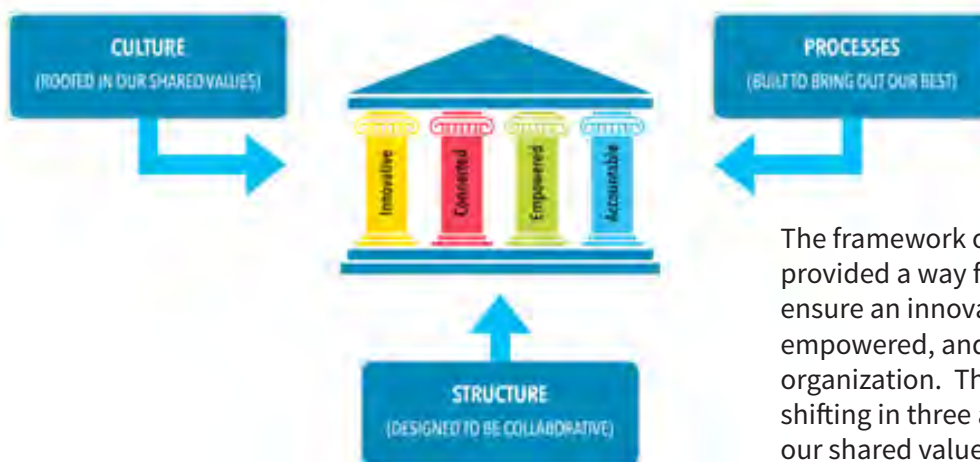
Amber	Teal
• The organizational chart has boxes, reporting lines, layers of hierarchy and a clear chain of command. • Decisions are made at upper levels of the hierarchy; lower levels carry them out. • Stability is the glue of the organization. • The organization is built to maintain the status quo, not to adjust to change.	• The organizational chart represents interacting and working together surrounding a common purpose. • All employees can make decisions according to a clear understanding of mandates, core services, shared values and through following processes. • Purpose is the glue of the organization. • The organization is built for action, ensuring effective delivery of core services and innovating for the future.

There is nothing better about being at a different level (colour) of organizational development. The question is whether that level of development is a good fit for the task at hand. Organizations that have a shared sense of purpose, encourage self-led individuals and teams, and work as a whole, achieve better results.

Much of what we were learning made good sense to us. However, it's not easy to change an organization's traditional structure. The transformation would have to occur on many levels. Our next step was to create a framework for change.

A Framework for Change - Four Pillars; Three Strategies

Achieving an innovative, connected, empowered and accountable organization requires shifts in three areas.

CULTURE (ROOTED IN OUR SHARED VALUES)

PROCESSES (BUILT TO BRING OUT OUR BEST)

STRUCTURE (DESIGNED TO BE COLLABORATIVE)

The framework outlined a plan that provided a way forward. We set out to ensure an innovative, connected, empowered, and accountable organization. The organization would be shifting in three areas: culture (rooted in our shared values), processes (designed to bring out our best), and structure (designed to be collaborative).

## Culture (Rooted in our Shared Values) - What have we done?

We don't want merely to talk about our values or post them on the wall; anyone can do that. We want to do the hard work of defining what our values look and sound like when they're being lived. We want to be certain that whether you work at Central Services or in one of our schools, our values are apparent to those we serve and each other in every encounter.

1. We gave up our bland set of values and created and defined five new core values, noting what each value is and what it is not.

2. We use the values when we hire and look for "good fit" as much as technical skill.

3. We begin meetings with a review of the core value of Genuine Relationships. Doing this reminds us of who we will be for each other during each meeting.

Genuine Relationships Are...	Genuine Relationships Are Not...
• Engaging in healthy conflict over ideas and concepts that drive a discussion toward goals and growth, trusting that we are all committed to the vision and goals of the school and school division, knowing fully well that it does not impact our interpersonal relationships • Acknowledging that we have heard and understood others' points of view. • Being transparent in our communication, disclosing what we are at liberty to share. • Demonstrating optimism - noticing what is going well, rather than noticing only what needs to improve. • Working as a team, everyone striving to do their best.	• Thinking that we don't have to implement decisions that we did not fully support and undermining what the group is trying to accomplish. • Being aggressive to make a point without listening or honouring others' concerns or views. • Telling everyone everything. There are legal and professional obligations NOT to share personal information of students and staff. • Avoiding important conversations, not addressing conflict with others or not acknowledging things that could improve. • Succumbing to group think.

4. We run key decisions through our Values Hex to ensure they reflect our values.

5. We highlight our values in a variety of documents such as job postings, position profiles and our Conditions of Employment.

6. We offer training to staff and board trustees that enables us to live our values. For example, learning about our conflict styles and how to give feedback provides us with tools to have honest and sometimes difficult conversations with our colleagues.
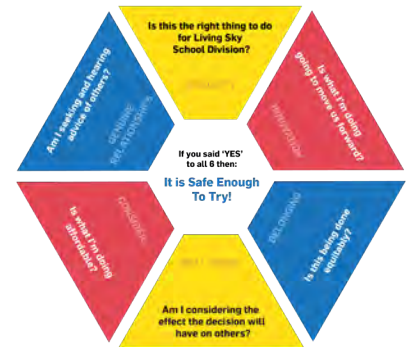
Processes (Built to Bring Out Our Best) - What have we done?

An empowering self-led organization requires processes everyone knows how to use well.

1. **The Advice Process** we created allows everyone to act on ideas and get involved in the decision-making process. Decisions are not made through consensus, but rather through collective intelligence. To make a decision, one must ask for advice from subject-matter experts and people whom that decision will directly affect. This way, decision makers are provided with the information necessary to make a well-informed decision, but not with a predetermined resolution.

2. **Cross Functional Hiring Panels** – Human Resources ensures good process and invites people to take part on cross-functional hiring teams. Interviews involve future teammates and others from different areas of the organization. What we have seen is that people who have a say in who their colleagues will be tend to take the process very seriously and help them succeed once they've been hired.

3. **Meeting Styles** – Learning to use a variety of meeting styles allows us to choose the format that will bring about the desired outcome. No more going in circles! The three most used meeting styles are tactical, governance and retrospective.

4. **The Project Initiation Template (PIT)** – PITs help with self-management. They take teams through a process that has them think about the need or problem the project is meant to address, its tie to the strategic plan and four pillars of the redesign, and success criteria. The RACI framework clarifies who is accountable for the project, those who are responsible for various aspects of the work, people who should be consulted, and people who need to be informed. Every project is also run through the Values Hex.

   All PITs are posted on MySky, our internal communication site, and progress is updated after each team meeting. Therefore, we can all see how the teams are doing! Often, the trickiest part of a PIT is thinking of a cool code name for it. This has become a good-natured competition! Three particular PITs are high-lighted later.

5. **Mandates and Core Services** – Every position has a clear mandate and list of core services. Core is what we spend most of our time doing. All areas of Central Services have shared their mandates and core services with schools. Schools are surveyed to gauge how we are delivering on our core services. The goal is for the core services that our office provides to be sleek and efficient, like a well-designed car.

Structure (Designed to be Collaborative) - What have we done?

1. Students are at the center of everything we do. We have simplified our heirarchy, keeping the positive aspects of a hierarchical structure (clarity of reporting, clarity of roles and responsibilities), while limiting the downsides (lack of collaboration, being territorial, a rigid structure that may get in the way of innovation, bureaucracy, siloes).

   Our structure is based on distributed authority, where people have autonomy in their domain and are held accountable for coordinating with others.
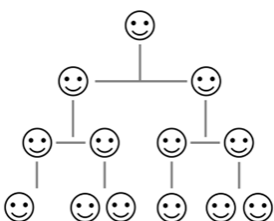
2. The benefits of cross-functional teams are collective wisdom, decentralized decision making, and fluid collaboration.

We are moving from this…   To this….

Our Organagram

- Power at the top
- Performers at the bottom
- Information travels top to bottom, bottom to top.

- Collective wisdom
- Decentralized decision-making
- Fluid teams

Teal in Schools

After Central Services had been working in the redesigned structure with some of the new tools for a while, we were ready to try several of our processes in schools. We had been sharing our learning journey with our Administrators' Council and had developed six modules that were provided both to our school-based leaders and to the board.

A process was designed to determine if schools were ready to begin this change process. Then, schools volunteered to be part of phase one. Because there would be a lot of learning, coaching from superintendents and practice involved, our capacity was limited. We started with four schools participating in the first year, and that was perfect!

The Advice Process was adjusted to be used with school learning improvement plans (SLIPs) and was incorporated into a SLIP Think Book. PITs became SLIPITs – projects designed to move SLIPs forward. Some new tools were designed such as a teal menu/reflection guide and key readings/books were provided and studied.
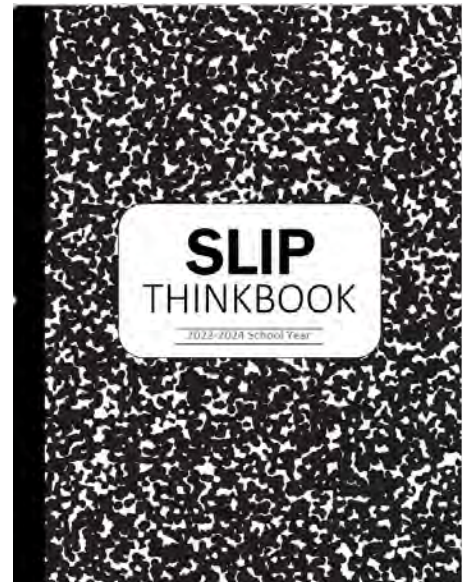
School staffs met to discuss our values and solidify their mandates and core services. There were monthly meetings that alternated between in-person and online. The in-person meetings involved learning about teal concepts (Advice Process, core services, meeting styles, PITs…) and discussing how they could/were being applied in schools.

As the year progressed, the online meetings became reflection sessions during which teams shared their journeys, responding to specific questions about their level of engagement in the processes, use of tools, 'aha' moments, progress, etc.

At the June meeting of the Administrators' Council, we held a retrospective meeting for the pilot schools. It was done within the context of teaching the other schools about retrospectives by having the four schools do a "fishbowl" style meeting for the rest to observe.

We've learned some interesting things about long-term, deep change along the way. Frederic Laloux wrote that our dominant mental model for change comes from an assumption that organizations are complicated systems, like an airplane. According to this model, if we are smart in our analysis, we can plan a change effort for the next two, or even five years. And once we have a smart plan, it simply takes disciplined execution.

The reality is that organizations are almost always complex systems, like a bowl of spaghetti. It has only a few dozen parts, but tug at one end of a strand of spaghetti that sticks out, and even the most powerful computer will not be able to predict what will happen. if we want to untangle the spaghetti bowl, we start by looking at it from all sides, and when we think we've found the most promising strand of spaghetti to pull on, we start to do so carefully. If it keeps coming, we keep pulling. If we seem to hit a knot, then it's time to pause, take a good look again, and start pulling somewhere else.

"The only way to make sense out of change is to plunge into it, move with it, and join the dance."
- Alain Watt

Results

Below are just a few examples of some of the projects that have achieved good results in their initial year.

1. **SkyPLUS Learning**
    SkyPLUS provides ultimate flexibility and choice for LSKYSD students by using blended and place-based education. There is flexibility and choice so that students can meet their education goals, their way!
    *   There are thematic bundles such as Life Essentials, Agriculture, Language, Identity and Culture, and more.
    *   Students can choose their own adventure by picking and choosing among the various modules.
    *   A brilliance project allows students to earn a credit in an area of passion.
    *   We are building partnerships for student community learning opportunites and apprenticeships.

Past data has shown a success rate of 82%. SkyPLUS was designed considering student feedback, and we expect even better results in the future. Currently there are 162 students taking 212 SkyPLUS credits.

2. **Winter Learning**
    Students from Maymont, Cut Knife and Luseland schools had experienced discontinuity in their learning over past winters, due to a high number of at-home days resulting from severe weather or facility issues. Also, when the weather was bad, even students who lived in these communities sometimes stayed at home.

    This project was designed to support learning, engagement and connections on days when most or all students cannot attend school. This plan would ensure that learning opportunities were available every school day, regardless of unforeseen circumstances. It confirmed that staff and students would be prepared in advance for ten days of academic learning to continue, despite transportation issues.

    Students were empowered to continue their studies, due to carefully planned programming best suited to offsite learning. Staff and students were accountable for learning outcomes, whether learning occurred inside or outside of the school. Innovative means were sought to accommodate learners with limited technological access. For example, Poundmaker First Nation provided devices for students living on their reserve.
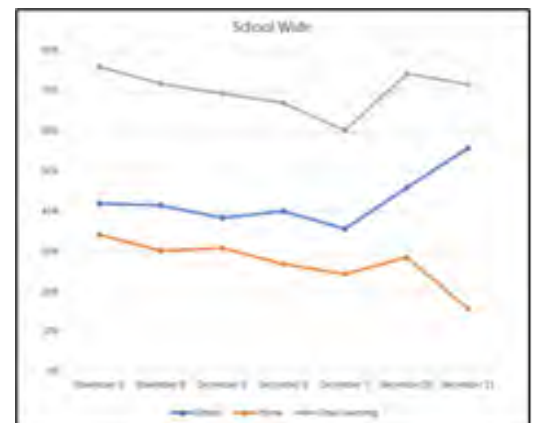
    Data
    (Because of space limitations, data for just one school are presented here.)

    Luseland School
    *   53% of students are transported to school by bus; 47% of students live in town.
    *   On "snow days," fewer than 30% of students from K-6 attended school, and about 10% of students in grades 7-12 attended school.
    *   During the Winter Learning experiment, engagement improved (refer to chart).

	School Wide		
	School	Home	Total Learning
November 3	42%	34%	76%
November 8	42%	30%	72%
December 2	38%	31%	69%
December 6	40%	27%	67%
December 7	36%	24%	60%
December 20	46%	29%	74%
December 21	56%	16%	72%

> **"I thought it was a huge improvement over previous years. I felt like the kids' learning was not impacted as much. Good work."**
> **- Parent Survey Comment**

A retrospective meeting took place in June. The team discussed tweaks to make Winter Learning even better this year. This project is now expanding to more schools.

3. **Windfall Wishes - Living Sky Innovation Fund**
   This project was created to provide equitable opportunities for all students throughout the division to support the board's vision of *Growth Without Limits, Learning for All.* This fund, through partnership with the Battleford and District Community Foundation, will generate donations to create opportunities for all schools. A centralized and well-promoted fund will also assist in providing support for innovative projects.
   Current Donors:
   • $500 from Innovation Credit Union
   • $10,000 over 5 years from Discovery Co-op to promote Indigenous culture and Truth and Reconciliation
   • $10,000 over 5 years from Sasktel for empowering connection in education
   • Staff and community members are donating through payroll deductions and donations from recyclables.
   • **We also have a major donation to announce in the near future!**

Sustainability

Deepening the redesign is part of the board's strategic plan.
Outcome 2.1: By 2030, we will actualize the redesign according to the goals outlined in Reimagining Living Sky: A Framework for Change.

Metric: Success is identified in the document Reimagining Living Sky: A Framework for Change through the four pillars of empowerment, innovation, connection, and accountability.

Actions:
• Ensure a culture rooted in our shared values, in which we are all guided by a common purpose.
• Create a structure that facilitates and supports innovation through coordination and collaboration.
• Establish processes that allow us to strengthen core services and innovate for the future.

Leadership Roles (Board & Senior Leadership Team)
The board and senior leadership team must believe in the destination, a future in which:

• Our outcomes are fully achieved.
• Small rural schools remain vibrant with a variety of programming and course loads that attract teachers.
• Funds are available to support innovative experiments/pilots so we continue to learn and grow.
• Excitement, energy and joy are the norm as we celebrate new ways of thinking and doing.

This requires a certain stance from leaders, one that shows confidence and a strong commitment to the journey, as well as a willingness to openly admit that change is difficult and there will be bumps along the way.

Change is never entirely painless; for a long while, things will be out of balance and confusing.
• Some of the new practices we are trying to initiate and deepen run against the grain of traditional thinking. A critical role of leaders therefore is to facilitate the use of new structures and practices.
• Whenever a problem comes up, someone will want to revert to a tried and proven solution such as adding a rule, being more prescriptive, passing decisions to a higher level.
• Over and over again, leaders must ensure that new practices are reaffirmed - that we stick to what we are trying to learn. It will take time and require resolve!
• Another role of leaders is to model, to the best of their abilities, the behaviours needed for the new culture, structure and processes to flourish.

"Taking on a challenge is a lot like riding a horse, isn't it?
If you're comfortable while you're doing it, you're probably doing it wrong."
-Ted Lasso

LSKYSD Addenda

Some Key Resources
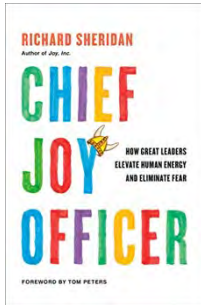
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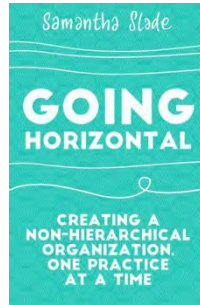
Horizontal is not flat. Functioning in a more horizontal and participatory way creates a LEADERFUL organization where each person is in their full potential, no matter their role.
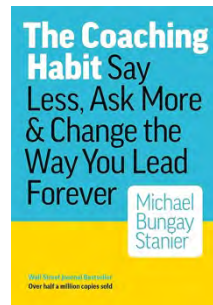
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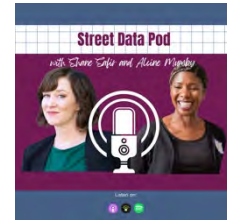
Good data is not just "big" data. Street data tells us that what is measurable is not the same as what is valuable.

Holacracy transforms outdated hierarchies into a system of agile, self-organizing networks.
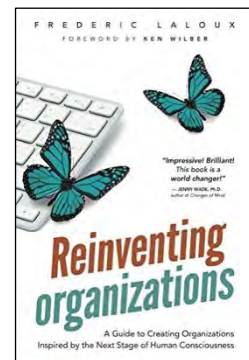
Make a move from Amber toward Teal!

Be Lazy, Be Curious, Be Often – Michael Bungay Stanier - https://podcasts.apple.com/ie/podcast/michael-bungay-stanier-be-lazy-be-curious-be-often/id1255922966?i=1000395449831

Compassionate Leadership Is Necessary—But Not Sufficient (Harvard Business Review) – R. Hougaard and N. Hobson - https://hbr.org/2020/12/compassionate-leadership-is-necessary-but-not-sufficient

Design Thinking and Solving the most Wicked Problems in Education - https://www.scribd.com/listen/podcast/418376257

Design Thinking for Educator's Toolkit - *https://page.ideo.com/design-thinking-edu-toolkit*

Development of an Innovation-Friendly Education System -
- https://bbpmpjatim.kemdikbud.go.id/jelita/development-of-an-innovation-friendly-education-system/

Nudge: The Final Edition – Richard H. Thaler and Cass R. Sunstein

Start with Why: How Great Leaders Inspire Everyone to Take Action – Simon Sinek

Street Data: A Next-Generation Model for Equity, Pedagogy, and School Transformation – Shane Sfir and Jamila Dugan

Teaching the Dinosaur to Dance: Moving Beyond Business as Usual – Donna Kennedy-Glans

The Framework for Change

LSKYSD'S Framework for Change

We want to be an innovative, connected, empowered, and accountable organization.
This requires us to consider changes in three areas:

Culture
(Rooted in our shared values)

Organizational Pillars

Innovative · Connected · Empowered · Accountable

Processes
(Built to bring out our best)

Structure
(Designed to be collaborative)
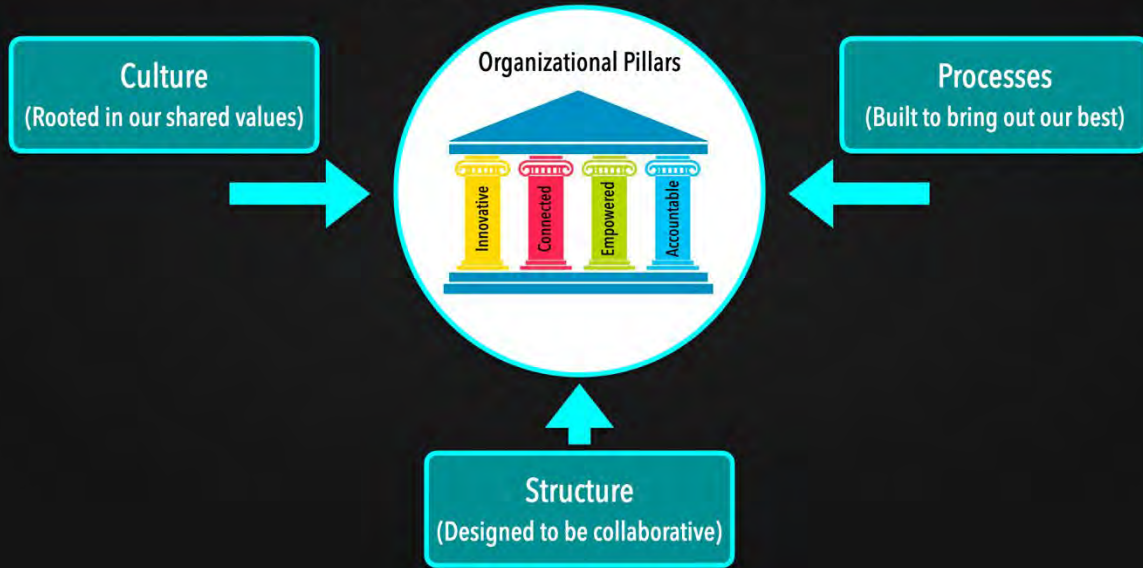
LSKYSD'S Strategies for Change

Organizational Pillars

Culture
Common Purpose
Self-management
Values Hexagon

Culture
(Rooted in our shared values)

Innovative · Connected · Empowered · Accountable

Processes
(Built to bring out our best)

Structure
(Designed to be collaborative)

Processes
Three Box (Present, Past, Future)
The Advice Process
PITS
CAIR Framework
Mandates and Core Services
Meeting Styles
Procedures/Protocols
ERM

Structure
Teams

Four Pillars

Innovation
- Innovation is a way of thinking and working, not an initiative, program or clever idea.
- Innovative staff enjoy finding solutions to problems.
- They thrive on making change for the better and filling needs.

Some innovative projects:
- CAD Me Up, Smashing Maths, Windfall Wishes, Rock the Reg(ulation), It's Milling Time, Winter Learning

Connection
- Connected staff work together to support schools and students.
- They share a common purpose.
- They see the bigger picture and how they fit into it – how their work is connected to the work of others.
- Connected staff build relationships with colleagues.

Some projects related to connection:
- *MySky* connects us virtually; *Creating Connection Capacity* connects us in person.

Empowerment
- Empowered staff self-manage within processes and frameworks that govern us all.
- Empowerment requires staff to feel that they are trusted to make decisions over their work and interests within the organization.
- Empowered staff own the consequences of their choices and strive to improve in the future.
- Supervisors of empowered staff offer support and advice more often than permission.

Accountability
- Accountable staff own their actions and decisions.
- Accountable staff are conscious of the values of the organization and demonstrate their understanding in the ways they work with and for others.
- They understand the processes we use to self-manage and use them in their work.
- They are accountable to their roles. They are clear about their mandates and core services and work to deliver them well.
- Accountable staff recognize how their work and actions have an impact on others, and they trust their colleagues to be as committed as they are.
- They commit to do what can reasonably be expected and follow through.
- They acknowledge their mistakes by informing others and welcome constructive feedback from colleagues.
- Supervisors of accountable staff know how to coach and mentor.

INTEGRITY
Owning everything we do.

We live our values, not just memorize them. We are accountable for our actions and speak with honesty, even when it is difficult to do so. We follow-through on what we say we will do.

kwayaskātisiwin
(quay usk KAHT soo win)

Value Example

INTEGRITY

Integrity is...	Integrity is not...
• Practicing our values rather than simply stating them.	• Professing our values but not acting in accordance with them.
• Making decisions in accordance with our values and based on the best standard or ethical practice.	• Appeasing others or making decisions based on what fits our personal agendas. Doing what is fast, easy or popular rather than what is right.
• Being genuine in our interactions, speaking honestly even when it's difficult to do so.	• Making allowances for others doing wrong or looking the other way.
• Acknowledging when our actions may have had a negative impact on others, apologizing and taking actions to reconcile.	• Blaming others and refusing to own our part of the issue.
• Being accountable for our responsibilities and following through on our commitments.	• Consistently failing to meet deadlines and expectations. Letting others do more than their share of the work because we are not doing our part.

Genuine Relationships

Genuine Relationships are...	Genuine Relationships are not...
* Engaging in healthy conflict over ideas and concepts that drive a discussion toward goals and growth, trusting that we are all committed to the vision and goals of the school and school division, knowing fully well that it does not impact our interpersonal relationships. * Acknowledging that we have heard and understood others' points of view. * Being transparent in our communication, disclosing what we are at liberty to share. * Demonstrating optimism – noticing what is going well, rather than noticing only what needs to improve. * Working as a team, everyone striving to do their best.	* Thinking that we don't have to implement decisions that we did not fully support and undermining what the group is trying to accomplish. * Being aggressive to make a point without listening or honouring others' concerns or views. * Telling everyone everything. There are legal and professional obligations NOT to share personal information of students and staff. * Avoiding important conversations, not addressing conflict with others or not acknowledging things that could improve. * Succumbing to group think.

Genuine Relationships is one of our five core values. We review this value before every meeting, including board meetings. It sets the tone for our time together.

The Values Hex

Is this the right thing to do
for Living Sky
School Division?

INTEGRITY

Am I seeking and hearing
advice of others?

GENUINE
RELATIONSHIPS

Is what I'm doing
an improvement?

INNOVATION

If you said 'YES'
to all 6 then:

It is Safe Enough
To Try!

Is what I'm doing
affordable?

CONSIDER:

BELONGING

Is this removing and/or
avoiding the creation
of barriers?

WELL-BEING

Am I considering the
effect the decision will
have on others?

The Advice Process

CRITICAL STEP

2. CONFIRM

Confirm who the decision-maker will be. If it is just you, move on to Step 3. If it's more than you, build a team.

1. IDEA

Notice a need, whether or not you have a solution in mind.

3. ADVICE & ANALYSIS

Consult experts, people who are affected, and those who may offer a unique perspective and consider their advice.

7. LEARN

Decide to adopt, adapt or abandon the project based on data and learnings. If you choose adapt, return to step three.

4. BUILD

Experiment, build solutions and test with users. Gradually refine and improve the solution until it is safe enough to try.

Advice Process

PLAN

ADJUST

STUDY

DO

6. MEASURE

Use data to check on how the plan is working. Make adjustments as needed.

5. IMPLEMENT

Put the first cycle of the plan in place and improve as you go.

Team Tactical Meetings

1
Check-In Round
One at a time, participants state distractions to get present. There is no discussion.

2
Checklist Review
The Secretary reads the lists of commitments from the last meeting that should have been completed by this meeting. Participants respond "**check**" if it's complete or "**no check**" if it's not complete. There is no discussion, but participants may want to note tensions for incomplete commitments.

3
Project Updates
The Secretary reads the list of ongoing projects. Participants respond with **any updates** or say, "**no updates**". Updates can only be in the past tense; they are about what has been done, not about what you plan to do.
Participants may ask **clarifying questions**, and they may want to note tensions for projects that are off track.

4
Build Help Request Agenda
The Secretary collects a list of help requests from participants. This step is only for generating a list, so participants should only list two or three words per item.
This list can be adjusted over the course of the meeting. At any time, during Step 5 (Offering Help), a participant can ask the Secretary to add another help request.

5
Offering Help
The Secretary selects help requests from the list. The Facilitator processes help requests one at a time (see back of card).

6
Close-Out Round
One at a time, participants list the commitments they've made based on the triaged tensions. The Secretary will provide assistance if needed. There is no discussion.

Offering Help

5a
Help Request Invitation
The Facilitator asks: "**What help do you need?**" If the participant who raised the help request isn't sure, they can solicit help from others.

5b
Listen for the Request
The Facilitator listens to the request and selects the appropriate pathway to offer help. Usually, the Facilitator will start by asking a clarifying question.

"Do you want someone to get something done?"

Ask: "**What role would you like to request this from?**"

To the target of the request: "**Would it serve your role's purpose or accountabilities to take this on?**"

- If the person who raised the help request is unsure of whom to target, the Facilitator can ask the group for input.
- If it doesn't fit a clear role, ask the person who raised the help request to refer to the New Stuff chart or the Organizational Chart to determine where to send the request.
  - If it matters to Living Sky but fits under no clear role or team, remind the participant who raised the help request that they could email the office or put up a request on the staffroom bulletin board.

"Do you want input or information?"

Ask: "**What role would you like to request this from?**"

To the target of the request: "**Can you provide sufficient information in the next two minutes, or should you commit to making time after the meeting to help?**"

- If the participant who raised the help request is unsure of whom to target, or if they want feedback from the entire group, Facilitator can ask the group for input in a **reaction round**: anyone shares, one at a time, with no discussion.

"Do you want to take ___ minutes to just have a conversation?"

Ask the group: "**Can we commit to ___ minutes?**"
- The group can have an open discussion for the allotted time. Facilitator monitors time closely. When the clock runs out, the discussion ends.

"Do you want to share information?"

- Allow space for the person who raised the tension to share what they want to share.
- There is no discussion.

"Is this something you'd like to expect on an ongoing basis?"

Explain: "**Ongoing expectations like accountabilities should be defined as accountabilities. Let's make a note to raise this in governance.**"
- Then ask: "**Is there anything that can be done in the short term that you'd like to ask of someone?**"

"Is this a problem you want to solve with the group?"

Explain: "**Group problem-solving should be done in a project planning meeting, or in a divergent thinking or brainstorming session. Do you want us to find a time to meet for one of these?**"
- Then ask: "**Is there anything that can be done in the short term that you'd like to ask of someone?**"

5c
Capture Outputs
The Secretary records the output, as does anyone else who made commitments.

5d
Finish Helping
The Facilitator asks: "**Did you get what you needed?**" If not, invite another request.

Notes for Facilitators and Secretaries

2. Checklist Review
- The list should be pre-populated from the previous meetings.
- Commitments that are not expected to be completed by this meeting should remain on the checklist, but the Secretary can ask, "**Is it on track to being done by ___?**"

3. Project Updates
- Be watchful of attempts to say what people intend to do in the future. By focusing solely on what was done, it becomes visible if any work was done at all.
- Clarifying questions mean that the project owner is providing information, not the person who asks the question. Be watchful for leading, rhetorical, or other questions where participants are trying to influence the project owner. These should be moved to help requests or resolved outside of the meeting.

4. Help Request Agenda
- The Facilitator should be careful to remind participants that this is agenda-building only.
- The Secretary should record the name of the person who raised the help request.

5. Offering Help
- When asking "Do you want someone to get something done?"
  - Watch for people wielding implicit expectations on an ongoing basis. Also, watch for requests that don't fit any role's accountabilities or purposes. In either case, redirect participants to the last two questions which will move these to more appropriate meetings than Project Tactical.
- When asking, "Do you want input or information?" or "Do you want to take ___ minutes to just have a conversation?"
  - Watch for consensus-seeking behaviour, and watch for the loudest voices at the table attempting to influence the decision-maker. Remind the team, "**You have full authority to take any action or make any decision in service of your role and accountabilities so long as it doesn't break an existing rule or limit another role's abilities. So, what do you need to make your decision?**"
  - Watch for the time taken to provide input or have a conversation. These should be strictly limited because decision-makers can and should be encouraged to conduct this activity outside of Project Tactical.
- When asking, "Do you want to share information?"
  - Watch for anything other than strict information sharing. This might become a long explanation before a participant makes another request.
- When asking, "Is this something you'd like to expect on an ongoing basis?" or "Is this a problem you want to solve with the group?"
  - Be respectful but firm, because Team Tactical is designed to quickly overcome hurdles in someone's ability to perform their roles. These types of requests require different meeting formats.

6. Close-Out Round
- Some commitments take longer to complete than the time to the next meeting. These might be better thought of as projects. Be watchful for the difference between projects (multi-stage) which might need to have a PIT, and tasks (single-stage) which almost never need a PIT.

Governance Meetings

1 ## Check-In Round

One at a time, participants state distractions to get present. <u>There is no discussion</u>.

2 ## Build Governance Agenda

The Secretary collects a list of proposals from participants. This step can be done ahead of time. This step is only for generating a list, so participants should only list <u>two or three words</u> per item.

3 ## Process Agenda Items

The Secretary selects proposals from the list. The Facilitator processes proposals one at a time.

a. Present Proposal

Proposer states the proposal and can choose to explain the reasoning behind it. Others can help if the proposer asks, but this is only to craft the proposal. This is not to seek consensus or refine it.

b. Clarifying Questions

In a circle, the Facilitator invites participants to ask questions of the proposer. Questions must be to help better understand the proposal; they cannot be designed to influence. There are no reactions and no discussion. If the proposer is unsure of an answer or feels it's beyond the scope of the proposal, they can say "Not specified".

c. Reaction Round

In a circle, participants get the opportunity to react and say whatever they feel. Reactions are directed to the proposal, not individuals. The proposer does not get a chance to react. There is no discussion.

d. Option to Clarify

The proposer can choose to clarify any points, modify the original proposal, or drop the proposal for the time being. They are under no obligation to do any of these. No one else may speak, not even to help.

e. Objection Round

The Facilitator asks every participant in turn, "**Do you see any reason why adopting this proposal causes harm: objection or no objection?**" Each objection is stated and immediately tested (see back of card).

f. Integration Round

After all objections are tested, any valid objections are integrated one at a time (see back of card). Once all valid objections are integrated, repeat the Objection Round. <u>When there are no more valid objections, the proposal is accepted.</u> Return to 3a. to present the next proposal on the agenda.

4 ## Close-Out Round

One at a time, participants list any follow-up required of them after the proposals have been accepted. These might be added to the next Team Tactical Meeting's Checklist Review. <u>There is no discussion</u>.

Testing Objections in the Objection Round

The Facilitator listens to the objection and selects the appropriate question(s) to test whether it can be considered a *valid objection* or an *invalid objection*.

Keep in mind that objections are valid if the proposal would cause harm to the organization, either by making it more difficult to accomplish work or would cause an undue waste of time because it was poorly designed.

Criterion: The objection identifies how the proposal breaks the rules.

VALID — Does the proposal run against current policies, procedures, or protocols — OR — is it designed to change the rule(s) in question? — INVALID

Criterion: The proposal would introduce a new governance proposal if adopted.

VALID — Is the harm created by this proposal — OR — is it already a concern, even if the proposal was dropped? — INVALID

Criterion: The proposal would limit your role's purpose or accountabilities or those of someone not present.

VALID — Would the proposal limit your role or a role not represented in the meeting — OR — are you trying to help another participant or the team in general? — INVALID

Criterion: The objection is based on current information or is necessarily predictive.

VALID — Would the proposal necessarily cause the impact — OR — are you anticipating this impact will occur?

VALID — Could significant harm occur before we can adapt — OR — is it safe enough to try? — INVALID

Integration Round

Integrate one valid objection at a time.

i. Starting with the objector, ask, "**What can be added or changed to remove that issue?**"
   - If the objector has an idea, allow them to present it first.
   - If the objector doesn't have an idea, invite any participant to present an idea.
   - Every time an idea is presented, stop and test if it will work.
       - Ask the objector, "**Would this resolve your objection?**"
       - If it does, ask the original proposer, "**Would this still meet your need?**"
   - If both agree, then the objection is considered integrated.
   - Repeat the process, comparing the new amended proposal to the next objection.

ii. When all objections have been integrated, repeat 3e Objection Round.

iii. When there are no more valid objections to the amended proposal, it's accepted.

Notes for Facilitators and Secretaries

2. Build Governance Agenda

- Depending on the type of team, this stage might need to be done ahead of time to give potential participants advanced notice.
- Be careful to remind participants that this is agenda-building only.
- Record the name of the person who raised the agenda item.

3. Process Agenda Items

- In order to process items efficiently and to give equal opportunities to all participants, be mindful to follow the format strictly. There should be almost no dialogue in steps a-e.

3e. Objection Round

- If there are no objections, the proposal is immediately accepted. There is no need to test objections.
- The Facilitator's role is to determine if the objection is valid, not to prove the objection invalid. This requires careful listening to the content of the objection to determine which criteria the objection might be addressing, and it requires asking the appropriate question(s) to test whether the objection meets these criteria or not.
- When reading a question, be sure to read both sides of the question (before and after the OR), not just one side.
- The Facilitator doesn't need to test each of the four criteria questions. If more than one criterion is tested, an objection will be valid if it meets *any* of the criteria.
- The first criteria (the proposal would introduce a tension if adopted) may become an invitation to test the objection against other criteria. For example, the objector believes that the proposal will cause harm, but then identifies that it is safe enough to try. In these cases, it's appropriate to re-test whether or not the proposal will introduce a new tension by asking the objector, "**Do you still think adopting this proposal causes harm?**"
- The difference in the third criteria between proposals necessarily causing or harm being anticipated is often fuzzy. If an objector states that the proposal will necessarily cause the impact, but it sounds like predicting the behaviour of others, the Facilitator can choose to ask the secondary question, "**Could significant harm occur before we can adapt OR is it safe enough to try?**"

3f. Integration Round

- If there are no valid objections after the Objection Round, the proposal is immediately accepted. There is no Integration Round.
- The goal of integration is to create an amended proposal that would no longer cause the objection and would still address the proposer's initial tension.
- The Integration Round can be more like a conversation or a brainstorming session, though with some structure to discourage consensus-seeking.

4. Close-Out Round

- Watch for items that need to be added to the next Team Tactical Meeting's Checklist Review. What the Secretary is accountable for good note-taking, it's the responsibility of individual participants to recognize their commitments.

Retrospective Meetings

1 Check-In Round

One at a time, participants state distractions to get present. There is no discussion.

2 Project Review

The Facilitator asks the group, "**What did we set out to accomplish?**" The Facilitator or participants have the opportunity to review project management documents, especially the mandate, purpose, or intentions.

The Facilitator then asks the group, "**What did we *actually* accomplish?**" Again, the Facilitator or participants have the opportunity to review project management documents, especially the success measures, project timeline, and CAIR.

There is no discussion beyond reviewing what was stated as the intention.

3 Process Review

The Facilitator asks the group, "**What went well?**" One at a time, participants have the opportunity to share successes along the way, even if the project itself didn't success in its stated goal.

The Facilitator then asks the group, "**What did not go well?**" One at a time, participants have the opportunity to share successes along the way, even if the project itself achieved its stated goal.

Any discussion at this stage is to ask **clarifying questions** about the evidence of what was accomplished.

4 Action Planning

The Facilitator asks the group, "**What did we learn?**" or "**What are the next steps?**" One at a time, participants are given a chance to identify takeaways based on the process review.

5 Close-Out Round

One at a time, participants reflect on their experience in the retrospective. There is no discussion.

Notes for Facilitators

Be watchful for leading, rhetorical, or other questions where participants are trying to influence the project owner. These should be moved to tensions or resolved outside of the meeting.

2. Project Review

- This section should be fairly *objective* in the information shared. This should not be a discussion as the group should be very clear on the intended goal of the project, individual's responsibilities in the project, and other indicators of success such as timelines, benchmarks, or key outputs.
- The intention of this stage is to ground the group in the common understanding of their project's purpose. Be watchful, especially if the project does not appear successful, of attempts by participants to interrupt this stage with explanations. These should be saved until late so they can become part of learning.
- Be watchful if there is disagreement about the evidence, or if there is a lack of evidence. Group reflection cannot occur without a shared experience and shared understanding of that experience. If the project owner can't produce the metrics, outputs, or outcomes that serve as evidence of project success, then it's best to stop the retrospective meeting and reconvene at a later time when these are available.
- Information should be visible for all participants to see on an overhead, white board, or shared reports.

3. Process Review

- This section should be fairly *subjective* in the perspectives shared. As with the project review, this should not be a discussion in order to protect individual experiences as an opportunity for individual learning.
- The focus of this section is to prime participants to identify learning for next time. It is not to assign blame.
- Clarifying questions mean that the project owner or responsible team members are providing information, not the person who asks the question.
- Depending on dynamics of the group, outcome of the project, and nature of what did not go well along the way, this section may require more structure that a round of circle talking. Examples of more structure include time for participants to record their answers before the group discussion, the use of a "peaks and valleys" timeline, or the need for explicit sub-questions as part of a "blameless post-mortem".
- Reflections should be visible for all participants to see on an overhead, white board, or sticky notes on a wall.

4. Action Planning

- At all times, the Facilitator must keep in mind that retrospectives are designed to build personal and institutional learning so that successes are repeated and failures are avoided in the future.
- Facilitators must work to move participants smoothly through two sub-questions that are implied but _might_ need to be made explicit: "**What were the causes of what went well or not well?**" and "**What will I personally do differently now that I've experienced this?**"
- Typically, projects that are more complex or didn't meet their outcomes are more likely to need more structure in the conversation and may need additional questions. For example, after participants state their learning, the Facilitator could ask, "**If you took these actions, would you have been able to…?**" One at a time, participants are asked to test their *and others'* action plans against the process review. If the project was successful, the test is against what did not go well. If the project was unsuccessful, the test is about whether the project could have been successful.

The PIT

Project Initiation Template

Please remember that this is a template to help you build a project plan that covers all your bases and lines up with the purpose of the reorganization. *This is not a form to submit for approval. It is always important to let your supervisor know that you're planning to start a project.*

This Template is most useful during Steps 4 and 5 of the Advice Process: after you've gathered advice and before you carry out the plan.

Project Codename or Title

Current Stage of Advice Process
Keep this updated as the project evolves!

Date: Click or tap to enter a date.

☒ **Draft** (Advice Process 1 – Idea, 2 – Confirm, 3 - Advice & Analysis and 4 - Build)

☐ **Actively Running** (Advice Process 5 – Implement and 6 – Measure)

☐ **Wrapped Up** (Advice Process 7 – Learn)

		The person accountable for this project is responsible to keep track of the project using the traffic lights below. Be sure to update the current state and a brief description.	
☐	🟢	*Project is on time and moving forward as planned*	
☐	🟡	*Project is stalled and work needs to be done to get back on track*	
☐	🔴	*Project is off track and at a standstill*	

Strategic Plan
What area does this project support?

v. 2.6

Current Need

Describe the problem that you want to address with the project.

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Reorganization Pillars

Indicate which of the 4 Pillars of *Towards Teal* work you want to use to address the problem.

☐ **CONNECTED**   ☐ **EMPOWERED**   ☐ **INNOVATIVE**   ☐ **ACCOUNTABLE**

Project Design

Describe the project. Say what you want to do.

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Project Purpose

Based on the Current Need, Reorganization Pillars, and Project Design, state the ultimate goal of the project. Don't say the work you want to do, <u>say the goal you're trying to achieve</u>.

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Scope

Given the Purpose and Design, how big will this project be? Who will be affected?

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Constraints

What are the limits to your project, in terms of time, talent, and treasure?

On which date does project need to start for it to be helpful?
On which date will the project be successfully completed?
Roughly how many hours of work will people involved in the project have to invest?
What training do people need to do the work?

How much money will the project cost?	

Connections to Others

Using the CAIR framework, indicate who will be involved and how they will be involved.

Consulted
Accountable (for reporting on progress and success):
Informed (of the progress):
Responsible (for doing the actual work):

Success Criteria

How will you know that the project is on track? How will you know it's complete?

On track (indicators):
Complete (outcomes):

Project Plan

In the box or below, work through your project plan, eg: a breakdown of tasks, expectations of when each task will be complete, meeting types and schedules, reflection cycle, etc.

Task	C	A	I	R	Deadline	Notes

Transparency Plan

In the box or below, state your commitment to openly sharing honest progress with others. How often will you meet to check on progress? How will you inform everyone outside of the team what's happening? How will we all know that the project is on track, off track, successful, unsuccessful, completed, or abandoned?

Values

Does your project and the way you carry it out, line up with the 5 Values? Answer the questions in the Values Hex.

Is this the right thing to do for Living Sky School Division?

INTEGRITY

Am I seeking and hearing advice of others?

GENUINE RELATIONSHIPS

Is what I'm doing an improvement?

INNOVATION

If you said 'YES' to all 6 then:

It is Safe Enough To Try!

Is what I'm doing affordable?

CONSIDERED

BELONGING

Is this removing and/or avoiding the creation of barriers?

WELL-BEING

Am I considering the effect the decision will have on others?

Our Organagram

BOARD OF EDUCATION

DIRECTOR OF EDUCATION

EMPLOYEE SERVICES

OPERATIONAL SERVICES

Executive Assistant

HR Administrators

Officers
Payroll

Support
Facilities Coord.
Service Associate
Custodian

Specialists
Accounting &
Payroll
PR/Adv.

Support
Admin Assistants

Specialists
Transportation
Facilities
IT

Analysts
Technical
Developer
Network

Officer
Procurement

Trades
Facilities/Transp.
Journeypersons
Tradesmen

SERVICE LEAD 1

SUPERINTENDENTS

SCHOOLS

SERVICE LEAD 2

STUDENTS

SERVICE LEAD 3

Counsellors

Speech-Language Pathologists

Learning Consultants

Coordinators
Student Services
Mental Health

Educational Psychologists

Occupational Therapists

Indigenous Advocate

LEARNING SERVICES

CHIEF FINANCIAL OFFICER

- Students are at the center of everything we do.
- Schools wrap around students.
- Superintendents wrap around schools.
- Service leads work with each of the three main areas at Central Services: Operational Services, Learning Services and Employee Services.
- Teams sometimes work within their bubbles; they connect with other bubbles in their area, and they're connected to the other service areas (cross-functional teams).
- The Director and CFO wrap around both schools and Central Services.
- The Board wraps around the entire system.

Project Sustainability

Strategy Map 2023-2024

Values
Genuine Relationships
Integrity
Belonging
Innovation
Well-being

Mission
Shaping Our Future Through Thoughtful Schools

Vision
Growth without Limits; Learning for All

Strategic Mandate:
to enhance student learning, well-being, transitions and equity

Students (Stakeholders)	Responsive Programming for Emerging Needs	Affirming Environments
Internal Processes	Deepened Redesign	Reconciliation in Processes
Staff Learning	Staff Development — Staff Well-being — Reconciliation	
Finances	Strategic Budgeting	Optimal Staffing

We enhance student learning, ensure well-being, support smooth transitions, and foster equity...

By creating affirming environments and implementing programming to meet students' emerging needs...

And, by improving our core services, working to redesign the organization to be more innovative, connected, empowering and accountable, and embedding reconciliation in our processes...

Through people who are skilled and able to perform their roles well...

And by effectively and efficiently leveraging our resources.

Strategic Mandate:
to enhance student learning, well-being, transitions and equity

Students (Stakeholders)	Responsive Programming for Emerging Needs	Affirming Environments
Internal Processes	Deepened Redesign	Reconciliation in Processes
Staff Learning	Staff Development — Staff Well-being — Reconciliation	
Finances	Strategic Budgeting	Optimal Staffing

2.1 Deepened Redesign (Shannon)

Internal Processes	Deepened Redesign

Outcome: By 2030, we will actualize the redesign according to the goals outlined in Reimagining Living Sky: A Framework for Change.

Metric: Success is identified in the document Reimagining Living Sky: A Framework for Change through the four pillars of empowerment, innovation, connection, and accountability.

Actions:
- Ensure a culture rooted in our shared values, in which we are all guided by a common purpose.
- Create a structure that facilitates and supports innovation through coordination and collaboration.
- Establish processes that allow us to strengthen core services and innovate for the future.