

This early *20,000 ft. Memo* is a good example of how the opportunities to sit in and observe -- through a different lens -- a school system learning how to fix itself began to generate insights that would be validated through continued work with the system.

The memo was addressed to a member of an MCPS Organizational Development Team who worked for the teacher's union.

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July 21, 1999

TO: XXXXXXXXXXXXXXXXXXXX
MCPS Organizational Development Team

I appreciated the opportunity to take part in last week's session on Competency-Based Performance and the MCPS, and as usual would like to share some thoughts that it generated for me.

To put them in some sort of order, let me first clarify *why* I wanted to be there, i.e., what I was seeking to learn; and then some of my *assumptions* that may have filtered what I heard. Hopefully, that may give some sort of *meaning* to the relatively random thoughts and learnings that follow.

Where I was coming from

When you first invited me to something on "competency-based performance," I had a "*Been There/Done That*" sensation. Much of the work I had been associated with over 25 years had directly dealt with that issue in both training and education. Therefore I almost said "No," until it occurred to me that the issue of most relevance to your ODT's work had less to do with the "content" of what David would present, but instead, it's *context*.

By that I mean, after 20-30 years of efforts based upon the common-sense idea that "competencies" can be criteria for performance and performance-preparation (training,) *why is nothing really different* in the overall workings of most organizations? In other words, is there something "wrong" with the logic that if you have perfect parts, you should have a perfect system?

So I came looking for reasons why an approach that was not just common-sense, but also highly "systematic," has not seemed to fit into the on-going processes of schooling. And I believe I found some answers, at least for me.

Assumptions

As I noted in my presentation to your team earlier in the year, my assumptions about the ODT and its work derive from my personal take on several of the words we all tend to use as if everyone agreed upon their meaning. Among these are "Organization" and "Development" in your title; and also, "strategic planning," "jobs" and "roles." For example:

"**Organization**" -- This term in your team's name says something to me about its *fit* in the MCPS, as well as its relationship to "organizational competencies." The reason why I call

attention to what seems like the obvious is that, in effect, it defines your customer. The ODT's customer is the MCPS organization as a connected whole, not its separable parts.

This understanding seems critical to the uniqueness of the work you may be undertaking. The present interest in Competency-Based Performance provides a good example. Because the MCPS, as a "system," is more than the sum of its parts [and people,] *its* competencies -- as an organization -- are more than the sum of its people's competencies.

This means that [even though it includes it] organizational development is *not* the same as professional development. What makes it different is that a "system" is also a product of the *relationships* among its parts. Therefore the *capacity* I am calling "Organizational Competence," is not "in" people, but can be found "stored" in the connections between and among the work done by individuals [competent or incompetent.]

"Development" -- If you accept the above "organization-as-customer" focus, this has special meaning for the concept of "Development" in your title. As Russ Ackoff noted, "Development" has two dimensions: *Competence* and *Capacity*--

Competence -- what the organization can do
Capacity -- its ability to continue to do it

So, putting that all together, my assumption is that your designation as an OD Team means that among the key "products" you are developing for your "customer" [the MCPS as a whole] are sustainable relationships that will serve as its *capacity* to continually improve, as a whole, while it does what it does.

"Strategic Planning and Strategic Management" -- Although it may seem that I'm just playing with words, there are critical differences between some of them that can directly influence the ODT role.

Again from my experience, one of these is a differentiation between regular *planning* and *management* and *strategic* planning and management. A simplistic way of describing this difference is that the former are largely resource input-driven. The latter, on the other hand, are ends-driven. "Strategies" get their meaning from their relationship to making outcomes happen.

This has meaning for your current concern about individual "performance competencies" because I have observed that the nature of performance competencies change when one's role is directly tied to the outcomes end. As an example:

"Jobs" and "Roles" --During "planning," the job-specific performance competencies [that were the focus of last week's workshop] play a most useful role. The "system" needs them to anticipate and determine the scope and minimum requirements to get the *whole* job done. They are used to define jobs, and then these job descriptions prove helpful for functions such as hiring, training, needs identification, and supervision. Unfortunately, they also get used for evaluation.

I say "unfortunately" because once past the planning phases of work, the strategic picture changes. In the on-going, dynamics of the schooling workplace one's job takes on less importance than the role or roles that *must* be played. In settings marked by committed people with limited resources, individuals have little choice but to become generalists. The roles they actually play are determined by their sense of immediate needs, knowledge of resources easily available to them, and relationships to others committed to support them. They try to do whatever needs to be done as they try to solve the problems that confront them -- many times *in-the-moment*.

This differentiation between “jobs” and “roles” can be especially important to understanding the context for the ODT’s work. That is, a school work setting where *isolated practitioners* are the norm -- one teacher to a classroom, one principal to a building, and central office staff seemingly isolated from them both by both distance and time.

At present, all of these people have to deal with the dissonance of being held accountable for “jobs” that don’t match the scope and nature of the actual roles they *know* they play or must play. This tension plays out in labor-management contracts, accountability schemes, turf battles, and even strategic plans. What seems missing for them is an organization or “system” that has the sustained capacity to support a minimum set of roles that must be present in order to respond to the continual needs of each child in the system.

Could these be among the *organizational competencies* that need to be developed through the ODT’s support?

What did I learn?

(The following thoughts are definitely not intended to put down Dave or his ideas, but to provide a complementary way of understanding their significance for the ODT role and tasks. So, while they may sound critical, I’m just using them as a foil to help me develop by contrast the missing dimension that continues to limit the effectiveness of similar approaches.)

I came looking for reasons why an approach that was not just “common-sense,” but also highly “systematic,” has not seemed to fit into the on-going processes of schooling. Here are some tentative “findings.” Sorry for their randomness, but I’m working from scribbled notes and haven’t received yet the materials from his presentation that I know you mailed out.

- David noted at the beginning that he didn’t want to deal with “roles” or “organizational” competencies. He said “organizational” competencies were a waste of time to talk about. He saw them as “blue sky”, “future search”-like ramblings and recommended going directly from the SES strategic plan to employee core competencies.

- He seemed to be trying to build a “systematic” boundary around the material that did not let the “systemic” world leak in. For example, he defined *competence* as “a capacity to meet or exceed a *job*’s requirements by producing the *job*’s outputs within the constraints of the organization’s environment.”

But the “constraints of the organization’s environment” is where the real *systemic* world does leak through. As a consequence, the functions missing between a *job*’s entry requirements and a *role*’s operating requirements are supported almost totally by the “care equity” contributed by the isolated practitioner. What we term *burn out* seems little more than the depletion of that care equity bank as individuals try to do what a “role” requires without sustained support from their organization to do it [because it’s not part of their planned “job.”]

- The challenge for MCPS [and all of us] is how to deal with this *jobs-roles* condition. It may seem like another “either/or” paradox, but I find it can be better understood as a “both/and” situation when you ask which is the “constant” and which the variable?” In the *systematic* “either/or view, jobs are held constant -- the parts that have to be in place; and the roles are variables -- not every child will have access to caring, committed, knowledgeable adults until *someday* when we can hire, train, etc. enough of them.

In the complementary “both/and” *system* view however, the critical roles to support learning [e.g., access to caring, committed, knowledgeable adults] are the constants. That means each child is in an environment that provides that minimum capacity through access to one or more individuals. This provides the management flexibility of dealing with what we know about the variability of human knowledge and behavior, and that the quality of the organization’s responses will be improved by inclusion of multiple perspectives. The *organization* then can be held accountable for ensuring that the required competencies are represented in the combination of jobs that fulfill the role.

I’ll comment at the end about one possible implication of this for *leadership development* in the system.

- What seemed most clear to me at the end was that David had a sound *systematic* model for competency-based performance in an organization, but which was not a model that is of an organization.

That is, it is a sound and tested way to fix an organization’s HR function. And it could have the broader effects he envisions for the entire organization if the management of *human* resources had the same priority and system support as does the management of *fiscal* resources. [This may be why he seemed frustrated that there is no ROI data to support his beliefs.]

The truth is that HR development doesn’t appear to have that support in MCPS [or most other organizations], and he’s not asking *why*. Something about the way he looks at the problem was preventing him from seeing the nature and beliefs behind the “organizational competence” that sustains fiscal resource management in almost all organizations, and which seems to be missing for human resource management.

- The nature of that missing lens became clear to me when he expressed surprise that, even without ROI data, people just couldn’t see and accept the logic of his approach. “*It’s not as if it was rocket science!*” he said.

And it was that metaphor that brought it all back together again for me. When I met with the ODT several months ago I also had used a “rocket science” metaphor. I noted that if NASA -- with all its present day technologies and people -- tried to reach Mars using the outdated “system map” existing before Copernicus, everyone could consistently do the *right things right...* and they would still not get where they wanted to go.

What he was presenting was coming from a different “system map.”

And this was why an approach that was systematically sound could not fit systemically in its larger organization. Competency-based performance concepts have made a difference in the structure and work of training or HRD departments. But these functions seldom make much of a difference in their own organizations.

- This suggests that there are two “system maps” that have to be used in navigating the course of schooling. The “official” one portrays the “planned” system and serves to identify the resources, and structures needed to achieve the system’s results.

But this logical system portrayed on the organizational chart is never the system as *experienced* by each of its members. The unofficial, “experienced” system continually influences what people actually do as they respond to actual conditions because it is carried around in their heads. This may be why approaches that make complete, logical sense in terms of a part of a system, don’t always fit the sense-making windows that each person in the system has developed from their experiences.

The organizational capacity to navigate with knowledge of both “systems” seems to be a critical factor in organizational leadership and organizational development.

What might any of this mean for an MCPS Organizational Development Team?

Although you didn’t ask, I am left with questions about the strategic roles the ODT can play in the performance management of the MCPS as a system. Here are some of them.

- With you consider the MCPS [as a whole] as *customer*, how does this change the nature of your defined work? For example, the “simple” task of training individuals for collegial *teamwork* has to simultaneously deal with the condition that many of them are held accountable for working *alone*. While this may not necessarily change too much of the training content, it could require inclusion of strategies for dealing with post-training realities where new skills usually can’t be effectively applied. It could effect your consideration of who should be involved in training experiences.

- How can differentiation between “jobs’ and “roles” contribute to understanding the organizational competencies [capacities] that need to be developed through the ODT’s support?

As an example, consider the differences between leadership as a *job*, and as a *role*. When dealing with it as a job your tools primarily involve training or re-training of individuals. As a role, however, that can be situationally filled by any number of individuals as needs demand, your tools and strategies also involve the shaping of *new ways of working together* that provide experiences from which both people and the system can learn.

This could involve you in identifying what MCPS capacities are required to support that happening, and then determining where in MCPS those capacities are already embedded. My hunch is that it isn’t in the “professional development area.”

- And the final thought I’m left with jumps far beyond my intent when I “accepted this assignment.” It’s about the opportunities this way of thinking offers you for communicating with a new leader -- Jerry Weast -- who has been quoted as wanting to focus the system on first answering the two critical “upstream” and “downstream” questions that define the scope and nature of the system: “Why are we doing this?” and “What effect is it having on our children?” And who then asks “How do we teach each child according to the child’s needs?” -- *The most unequal treatment given to children is equal treatment.*”

As we touched on during the earlier meeting with the team, the critical capacity missing in most school systems are processes that functionally link those who are accountable each day for responding to the needs of each child with those in the system who are accountable each day for responding to the needs of all children. The scope of the ODT charge, and the thinking from which it developed, suggests to me that you may have a unique potential to create that critical connection between *equity for all* and *excellence for each* in Montgomery County.

From my viewpoint as a friendly observer with knowledge of what’s happening in other organizations [school and non-school] across the country, I feel you have the unique challenge of working from the inside out to help your own system, as a system, understand and determine those “organizational” competencies that need to be part of their permanent capacity for supporting the minimum *roles* required in support of *individual* learning.

And from my interactions with you so far, I also feel you have the individual “competencies” to do it.

Thanks again for inviting me to learn along with you.