

SHEPHERDING CHANGE – AN AMATS RETROSPECT

LEADING BY LEARNING

RECOMMENDATIONS

With the Retrospect completed, the focus shifts to defining what is necessary to ensure learning is embedded and continues to grow.

For the purpose of this Retrospect, the learning focused on the Switching Gears Active Transportation Conference (in June 2014) and on the identification and initial launch of Better Block (a project identified at the conference and supported by very high levels of citizen action) until the end of January 2015.

In general, the recommendations focus on AMATS as Akron’s regional Metropolitan Planning Organization in its role as organizer and in conducting the Conference. It also, however, focuses on a less official role AMATS assumed as a committed member and citizen of the greater Akron community in forming an Akron Strike Team to launch and sustain (and spread) the Better Block initiative and of citizen driven community action.

The strategic intent of these recommendations is to help create a “road map” to ensure learning surfaced in the Retrospect is sustained, built upon, and spread.

Based on a review of the Retrospect and of an initial draft of these recommendations, this report is provided to AMATS for its use, distribution, and as part of its ongoing learning and knowledge management program.



RECOMMENDATIONS – SUMMARY

Required of AMATS in support of the Akron Strike Team:

1. Establish at least two (2) other Akron based Better Block projects.
2. Coach the Strike Team in practices needed to ensure collaboration and shared learning are demonstrated within and across communities that are in action.
3. Focus on inclusion of the full diversity and capacity available in Akron communities – not at the expense of action but at the request of action.
4. Clarify AMATS role and accountability with the Strike Team – this includes both immediate and long term. Work to build capacities needed by the Team to establish its rules of the road, unifying mission, and metrics of success.
5. Go back to Detroit and request a Peer Assist with Akron.
6. AMATS needs to stay in an active, transfer of leadership mode with the Strike Team until the Team demonstrates the ability to create its own action and learn from the outcomes.
7. Establish a process to promote “reflection.”

For AMATS:

8. AMATS needs to embed all critical learnings from this Retrospect into its current and newly required “knowledge assets.”
9. Conduct biannual Learning Health Checks of the Strike Team, conduct at least one Retrospect of a key milestone for them.
10. Review the learning materials provided by the Switching Gears Retrospect to determine ways of improving their impact on the conduct of future retrospects and on project execution by AMATS.
11. Identify the metrics of success from learnings that are valued by AMATS, those supported, and perhaps those that should be expected of contractors.

Recommendations are provided in two categories. The first category are recommendations of AMATS in direct support of the Akron Strike Team and the second category are recommendations in direct support of AMATS itself.

In the case of the first category (Strike Team recommendations) items, the strategic intent focuses on helping to establish the Strike Team and ensure its ongoing success. These are largely critical items that AMATS can provide to strengthen and mature the Strike Team based on AMATS own experience and proven track record. This allows the Strike Team to become less dependent on AMATS over time. Critical for the Strike Team and also for AMATS is demonstrating how best to transfer key skills like community leadership as well as allowing AMATS executive management to focus more time on its core functions on behalf of the Akron region.

The second category (AMATS recommendations) focuses on items of direct, ongoing importance to AMATS. While, in fact, all the recommendations are of value to AMATS in direct or indirect ways, these items are of particular importance to the internal working and growth of AMATS.

Required of AMATS in support of the Akron Strike Team:

1. Establish at least two (2) other Akron based Better Block projects.

“The “Better Block” project is a demonstration tool that acts as a living charrette so that communities can actively engage in the build out process and provide feedback in real time.”

Unlike projects that are funded and managed by established organizations with specific planned work efforts, outcomes, and deliverables in mind, there is a risk (actually an expectation) that things may happen in Better Block projects that are not expected - for good and for bad.

Considering the importance of the goal for engaging citizens in these type of efforts, particularly after seeing the level of support the work in North Hill has generated, it was agreed at the Retrospect that Better Block type projects need to be managed as “a portfolio” of no less than three (3) discrete efforts. This helps ensure that failure, or obstacles, in any one effort does not risk failure of the overall program intent.

Additionally, this number of projects provides a solid foundation for local, shared learning with cooperation among active communities - further supporting the likelihood of all efforts succeeding and spreading the impact of success.

Several schemes were discussed at the review of these recommendations to engage other communities beyond North Hill. Another conference seems unlikely due to time constraints, however, it is key to expedite identifying and launching additional Better Block projects in 2015...and that the Strike Team is integral in making this action happen.

2. Coach the Strike Team in practices needed to ensure collaboration and shared learning are demonstrated within and across communities that are in action.

As highlighted by the Retrospect, a great deal of learning has happened to make the success seen from the Switching Gears conference a reality. Recognizing that a concerted effort to build capacity for learning has been underway in AMATS for several years now, it is important to make sure the approaches to learning are demonstrated in tangible ways with citizens and communities as part of the Strike Team's mission.

AMATS needs to be active in making this happen. In a way, you can think of the learning practices as a "mode of transportation" – transporting ideas and better practices among citizens and communities in similar action.

Keeping the current levels of collaboration around work in the Better Block projects can serve to keep the passion, confidence, and shared learning at the heart of progress. Build a social network to keep future efforts alive and well and ensure ongoing success. As AMATS knows, the learning approach also provides a means for communities to "unlearn" by providing better methods that will displace "traditional" approaches that may be limiting success...the most effective way of removing old habits is by replacing them with new ones.

3. Focus on inclusion of the full diversity and capacity available in Akron communities – not at the expense of action but at the request of action.

There is good awareness that inclusion needs to involve race and ethnicity – and that additional work needs to happen here. It is easy to get involved in the tactics and work and forget to step back on how to leverage the full inclusion of the community's resources.

Diversity and talent also need to move beyond what is seen. For example, work to include private sector, faith-based organizations, diverse economic status and factors not visible.

It was noted in the Retrospect that dealing boldly and quickly with issues that the work team knows is holding back progress can be difficult – particularly if it is seen as a "conflict." The ability, then, to deal with people in a fashion that shows respect while not compromising progress is actually one example of a behavioral diversity. The good news is that it was clear from the Retrospect discussions that the greater Akron community has deep and diverse resources that can be accessed through social networks that exist and that are starting to be formed around the Switching-Gears Conference and Better Block.

Using and challenging these social networks will dramatically increase the success of the projects, bring communities together over time, and strengthen Akron's ability to take action.

Continuing on the example of sustaining progress, faith-based organizations are particularly important in the diversity of perspective and skills they can offer. Many have skills that are very hard to find in typical community projects. Building cooperation and tolerance is very important to establish and strengthen emerging community participation at the individual and spiritual level.

One rather amazing example of Akron's depth of capacity – and one that is generally not recognized - is that Akron is the home of the Alcoholic Anonymous “12-Steps” process. Held by many as the most important spiritual contribution in American history, the approach is based on community formation around faith-based principles and has expanded to virtually all forms of addiction – substance and behavioral. An amazing accomplishment and reflection of the capacity available in the Akron community!

Also embedded in this recommendation is the need to always be clear that working together (action) is the foundation for community progress. An example of the awareness of this during the Retrospect was that while the group appreciated the need to expand awareness of the talent in Akron – it also recognized generating a list of talents was not the issue. The issue was exercising networks, asking for help, and getting to work together.

4. Clarify AMATS role and accountability with the Strike Team – this includes both immediate and long term. Work to build capacities needed by the Team to establish its rules of the road, its metrics of success, and unify its mission.

While there is much excitement in the emergence of Better Block, it is realized that this is only a first step. You need multiple Better Block projects – and you need each of the projects to lead to a “viral” effect on community action, progress, and learning. At the current time the expertise and leadership in AMATS is critical to sustained progress – this needs to be reviewed and become shared capacity where appropriate. In the future, other capacities may be needed and leveraged by other citizens and groups. Recognizing how to do this is an important part of spreading and sustaining community action.

The Strike Team must make sure efforts lead to a demonstration of what success looks and feels like for communities. This demonstration should be “broadcast” by the emerging social networks and include demonstrating failure is acceptable – as long as the reason for failure is identified and overcome. These are all based on skills that can be learned and that need to be practiced.

It is also likely that the rules, mission, and metrics include identifying when the Team is no longer required. Assume that the strategic intent of the Strike Team is to build capacity into the culture of participating communities...and, over time, into the greater Akron region. In many ways, the disappearance of the Strike Team is a good indicator of its success.

In the meantime, the Strike Team can help in many ways to start the process around metrics that leverage AMATS track record as recognized in the Retrospect...for example,

- Give “approvals.” The platform and reputation provided by AMATS in conjunction with the Knight Foundation sent a clear message in support of a non-traditional approach...“approval” for North Hill to take action on Better Block. It was clearly noted in the Retrospect that ‘orchestrating’ this type of approval is critical in the NEOhio region...particularly for non-traditional approaches building on citizen action.
- Make sure the communities come out as the heroes. Following the first example, recognize that while we want to give credit to both organizations, the goal here is to make North Hill citizens the hero. It was clear in the Retrospect that both organizations know how to make that happen...the Strike Team needs to migrate that into the communities and the organizations helping communities.
- Link people and communities who have track records, reputations, and a drive to be in action. It was noted that all the speakers at the conference were of this ilk...that is what emerged as a model to the attendees and what helped Better Block emerge as viable.
- Help establish the habit of spending time on progress that ‘enables’ good behaviors – and displaces bad. These behaviors need to be defined but likely include taking action - displace the practice of having ideas while waiting on others to move forward. Action is required for learning to happen...knowing is not the same as doing.
- Demonstrate the concept of “act local; think global” by allowing supported local efforts to be shared and to “infect” other communities, citizens, and projects. The planning approach in AMATS was recognized as supporting identification of key, strategic attendees at the conference, communities where Better Block might be a good “pathfinder” to model. This capacity found a natural home for what has happened.

5. Go back to Detroit and request a Peer Assist with Akron.

This was already happening by the time we reviewed recommendations in the draft report. We left the item for completeness but more so to confirm that there are powerful indications of success in Akron! The progress on learnings from Retrospects should move well ahead of any reports. That is exactly what is happening here!

6. AMATS needs to stay in an active, transfer of leadership mode with the Strike Team until the Team demonstrates the ability to create its own action and learn from the outcomes.

The most clearly observed “indicators” associated with learning and progress – biking together, walking neighborhoods with people who live in the community, having food and/or a drink together, talking and caring, the surfacing of local leaders – are happening. This began establishing a clear sense of place, trust in each other, innovation, fun, local capacity to move forward on action together...the stuff of a shared belief and anticipation of future success.

It was also clear, however, that while there was benefit from delaying Better Block, there is a lingering concern that the delay can lead to non-action and the return to traditional behaviors.

AMATS has deep experience in the key elements of leadership that create action and has learned by virtue of the action’s outcomes (and lack of). As noted by one of the AMATS executives separate of the Retrospect, “sometimes you get into trouble when you assume others know what you know.” That needs to not be an assumption here.

The Strike Team (as a Team and in its current role) has not demonstrated it knows what AMATS has learned. AMATS involvement is critical as the Team’s coach to establish this level of performance as the norm...it needs to be in the Team’s DNA.

A corollary to “what we assume others know” is to not assume things will be as easy as expected or as fast. On critical efforts of transferring know-how and learning, it is better to start with a clear focus and a few key efforts. Get them right and the key competencies form a foundation to expand on.

The work for AMATS in this item is critical for success of Better Block and also for the role of the Strike team in moving to other community action. However, perhaps more important, is in learning how to do this. The work with the Strike Team and Better Block is a distinctive opportunity to explore and learn how to spread abilities like leadership into Akron communities. The role of AMATS then is to not only transfer its capacity but also to successfully allow the Strike Team to do the same. These are two distinct tasks. The second task is a new one for all parties.

7. Establish a process to promote “reflection.”

While the concept of “reflection” is built into the learning process used in AMATS (“what would we do different next time...and why?”; “why did that happen...and why?”, etc.), there are approaches to create a deeper awareness of the “elephants under the table” for individuals not in a shared work environment and in diverse neighborhood-based communities. Several such themes came out at the Retrospect.

Back to the 12-Steps process, its “Blueprint For Progress” includes a “searching and fearless moral inventory of ourselves” that provides deep insights leading to a framework for behaviors in communities. While the normal thinking is that 12-Steps is for Alcoholism, it is actually for addiction in a wide range of sources that are not always immediately apparent or linked to alcohol, drugs, or other substances. The value to the individual should also be a factor in any decision – obviously strong communities have strong citizens.

There are other approaches such as Centering Prayer, meditations, etc. that members of the community, or the Strike Team, are familiar with. This provides a great way of developing deeper understanding and relationships in and between communities. That is the goal. And consistent with the message in the Retrospect...get into action. There is no 'right answer' in the options...the right answer is to pick something and do it.

For AMATS:

“We are what we repeatedly do. Excellence, then, is not an act, but a habit.” Aristotle

8. AMATS needs to embed all critical learnings from this Retrospect into its current and newly required “knowledge assets.”

This is consistent with The Health Check for 2014. There are a number of key learnings that have had, tactical importance to executing a conference...Switching Gears, Annual, or other. Make sure they are captured where the work is done.

Some simple examples:

- Speakers need to be carefully vetted (discussed in detail in the Retrospect) and the venue designed to have speakers play off of each other.
- Make it mandatory to have speakers visit community ...let them love the place like we do.

These are things that make for better conferences...and make you better in the process. You need places where these types of learnings will routinely be found, used, and improved on....they need to live or else they die.

The very best case is that we get to learn again...in planning terms, that is called “hope.”

An initial effort to consider helping steer this effort is in planning for the next conference. The knowledge asset is intended to support doing things faster and better every time. AMATS success here will be readily apparent as the next event is conducted.

9. Conduct biannual Learning Health Checks of the Strike Team and conduct at least one Retrospect for key milestone for them.

The purpose of the Health Check is three-fold. The first is to help the Strike Team with clarity on its progress and insight on areas of focus with the most impact. Second, it is a means of assessing the value and impact of AMATS transferring its role into the Strike Team. Finally, as AMATS' practice with a core competency in managing knowledge and learning.

While we fully anticipate, based on this Retrospect and on the effort that continues at North Hill, that success is imminent, it is important to make sure AMATS limited resources are being invested productively. While not directly discussed at the Retrospect, it was clear from the nature of discussions that the goal of ‘infecting’ Akron communities was most important to everyone – Better Block is a way of helping that to happen. Better Block is not the ultimate goal...it is the means to an end. AMATS is a critical resource regardless.

The Retrospect included here targets demonstration of the “learning after” milestones for the sole purpose of identifying improved performance to prepare for future action of and with the Strike Team. It also places an emphasis on one candidate role for AMATS in the Strike Team going forward.

10. Review the learning materials provided the Switching Gears Retrospect to determine ways of improving their impact on conduct of Retrospects and on project execution by AMATS.

As discussed, the input from After Action Reviews and Retrospects can provide key information, metrics, and insights for improved performance and learning. It is recommended that the materials provided to support this Retrospect be critically reviewed to ensure AMATS is satisfied they accomplished what they expected. If not, review approaches. If so, it confirms the existing approaches are a good investment of time and resources.

11. Identify the metrics of success from learning that are valued by AMATS, those supported, and perhaps those that should be expected of contractors.

This serves to provide the basis of assessing internal and external performance – to help improve. It also starts to provide the clarity between learning and more established performance metrics to help AMATS with tangible outcomes from learning. This is good for AMATS and a helpful demonstration to others.

Consider a range of metrics. Conventional such as attendance, return participants, projects that were initiated. Also consider non-traditional such as unintended consequences, social networks, relationships, etc. This is an excellent topic to explore with the Strike Team – for them and for AMATS.