

Course Correction 101

Guiding Coalition Retreat, 2022

I. What is Course Correction? The measures taken to identify obstacles and implement actions to reach a goal without stopping the flow of work.

Why Course Correct? A sphere should course-correct when it runs into unexpected obstacles or the process for reaching a goal is not proceeding as planned.

Who Course Corrects? The sphere should come to a consensus on what's not working and needs change.

When Should You Course Correct? The sooner, the better. It is easier to plan and implement small adjustments than large ones.

What Does Course Correction Entail? Recapping lessons learned and learning best practices from content experts and other spheres in order to chart a new course.

II. Set Expectations for Course Correction

- Agree to build cultural norms that allow for course correction:
 - Avoid blaming sphere members for mistakes
 - Reduce layers of approval in chain of command
 - Reduce barriers to sharing information across functional areas/spheres
 - Increase opportunities for sphere members to interface with key stakeholders
 - Allow group to come together quickly to troubleshoot; don't rely only on regular meetings
 - Recognize people for positive outcomes and celebrate wins
 - Move forward as a sphere even if members are busy or out
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III. Determine What Needs to Change

- Integration - coordinating/leveraging overlapping processes or competing projects
 - For example: we need to "bake-in" our new processes to existing workflows to avoid having double the work and to ensure processes are carried out impactfully, as intended
- Scope - defining what is and what is not part of the change target
 - For example: we need to clearly define what is and what is not our target because it isn't clear to us and/or our stakeholders and is causing indecision
- Activities - defining what needs to happen to implement the change
 - For example: we need to redefine our objectives and/or further break down our work because we don't all know the tasks that must get done to reach our change target
- Schedule - managing the timely completion of the change target
 - For example: we need to revise our timeline because it isn't realistic and we're falling further and further behind
- Resources - understanding and acquiring the tools and people to reach the change target
 - For example: we need to recruit members and/or acquire tools because we don't have the bandwidth and/or skills to move forward
- Quality - ensuring change target requirements are met and up to standard
 - For example: we need to improve our quality of work because we're not meeting the standards we set for ourselves
- Communications - ensuring information is output regularly and clearly
 - For example: we need to communicate more regularly and more clearly because our stakeholders do not know enough about our progress or process
- Engagement - ensuring people have the opportunity and incentive to engage in the work
 - For example: we need to engage and motivate our staff because we need them to execute the work
- Results-based accountability - ensuring change targets are associated with measurables
 - For example: we need to assess if we reached this change target by measuring how much we did of it, how well we did it, and if anyone is better off as a result

IV. Course Correction Discussion and Planning Template

Which area of work (from the list above or otherwise) requires course correction?

Why does it need to change/what's not working?

What will change produce/what is the desired outcome?

What will change cost/what are the new risks?

How can you assess if this change is working?

How can this change be implemented with minimal disruption?

What resources are needed to implement this change?

Who will be primarily responsible for overseeing this change?

What are the next steps?	
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