Shaping a Values-Driven, Intentional Culture:

Using Excellence with Integrity Goal Achievement Process and Tools to Pursue Shared Goals

Metro Waste Authority

Case Study

Excellence with Integrity Institute & The Ray Center at Drake University

2019-2021

INTRODUCTION

Since becoming the Executive Director of Metro West Authority (MWA), Michael McCoy has led the organization through a deep, transformational culture change process. This process has been enhanced through a collaborative partnership that has brought access to, and use of, research-based tools and strategies designed to facilitate the process and fuel the progress.

The right tool at the right time can make all the difference. For MWA, it was the *Excellence with Integrity Goal Achievement Process and Goal Map Tools* developed by the **Excellence with Integrity Institute** and delivered by its consortium partner **The Robert D. and Billie Ray Center at Drake University**. Adding proven methods for turning strategic goals into actionable implementation plans is only one piece of a much larger organizational culture change happening at MWA.

We sat down with Michael McCoy and Leslie Irlbeck, Director of Public Affairs, to gather more insights into how the combination of culture shaping tools, executive coaching, training and facilitation are helping MWA reach new levels of success. Understanding how that story has unfolded thus far over four years is an essential backdrop to understanding how The Ray Center has helped MWA get the most out of the *Excellence with Integrity Goal Achievement* processes.

ORGANIZATIONAL BACKGROUND

Metro Waste Authority was formed 50 years ago in response to the State of Iowa's law requiring all communities to properly dispose of their solid waste in a sanitary landfill. In a time when regional cooperation to meet such needs was rare, MWA was formed to serve communities in and around Polk County. Today, MWA provides a full range of solid waste services for 22 communities and one county. It is governed by a 17-member board of directors, consisting of an elected or appointed official from communities served and an Executive Director; the organization has a $42 million budget to meet the solid waste disposal needs of member communities in central Iowa.

MWA operates many facilities and programs recognized for excellence at the state and national levels. These facilities include Metro Park East Landfill, Metro Park West Landfill, Metro Compost Center, Metro Central Transfer Station, Metro Northwest Transfer Station, and Metro Hazardous Waste Drop-Off. MWA also operates various waste reduction and recycling programs, including Curb It! – the most comprehensive curbside recycling program in the state, providing service to nearly 102,000 households. Other programs managed by MWA include Compost It! yard waste collection, residential solid waste collection, hazardous waste drop-offs for residents and businesses, and special waste disposal for commercial and industrial businesses.

THE CHALLENGES OF CHANGING ORGANIZATIONAL CULTURE

Michael McCoy was familiar with MWA before assuming the role of Interim Executive Director because he had previously been a member of the board of directors, and even served as chair of the board at one point. But he quickly found there is a big difference between being a board member and being the person directly responsible for managing the day-to-day operations of such a large, complex organization. His "culture shock" stemmed from his realization of the degree to which the organizational culture was holding the company back from effectively fulfilling its vision of No Wasted Resources. In the words of MWA leaders:

We reached out to Scott Raecker and The Ray Center team at a time when we knew we had to be progressive, and demonstrate our community value, while striving to be a top workplace for our employees. But we also knew that we had an already lean staff that was becoming even more lean. They suggested we actually identify what the barriers were for us to achieve our two-year strategic plan. But, they also suggested what we really needed was to better understand where we were headed beyond those two years. And so, they helped us create a five- to ten-year vision.

The culture challenges facing MWA were not dissimilar to those faced by many organizations from diverse workplace sectors: deep divisions, rigid silos, resentment between different groupings of employees— union versus management versus administrative staff, front-line workers versus administrators and management, divisions between different geographic locations, and so on.

Dismantling Divisions and Silos

Michael realized early on he needed to start breaking down the divisions and silos, and the resentment fueling them. If he was going to lead this organization to a better culture, first he needed to show he understood everyone's perspective and that he wasn't just another high-level administrator who "didn't get it." He took a very hands-on leadership approach (sometimes referred to as "management by walking around") where he would go out in the field to the different facilities and talk to front-line workers, ask questions, really taking the time to understand how the work is done. He even went so far as to take time to go through the process of obtaining his Landfill Operator Certification from the state's Department of Natural Resources. His goal was to earn vital credibility throughout the organization by showing (not simply telling) stakeholders throughout the organization that he understood first-hand their experiences and needs.

The next part of the culture change related to establishing new habits and accountability for creating a culture of civility and respect. This meant establishing clear expectations, modeling new habits, and holding everyone accountable to these habits. This set the foundation for establishing a whole new level of mutual respect in meetings, which had previ-

ously lacked, as well as accountability and healthy conflict resolution. These kinds of actions modeled at the top had a ripple effect in changing the overall mindset at MWA. These culture changes were noticed. Word spread quickly that the new executive director was shaking things up, starting with his own example. There was an emerging sense that a different set of MWA standards and expectations—a new MWA WAY—were coming into focus. Those who were ready for change were consoled and encouraged; those who were not ready for change were put on notice. The changes underway were for everyone's benefit—those at MWA and those served by MWA.

Collaboratively Determining Organizational Values

After working at dismantling internal barriers, it was becoming increasingly clear that the next step for cultural change would be a process of collectively determining a set of organizational values that would underlie the workplace culture and service to MWA customers. The values had to be more than empty words and slogans. The values would become the foundation of the intentional culture habits operationalized throughout the organization.

A two-day retreat was arranged that brought together—quite notably, for the first time in the organization's history—a truly diverse range of employees from every corner of the organization. The goal was to dig deeper into the results of a previous survey about what was working well for the organization and what could be improved. As the meeting got underway, everyone was sharing effusive praise for the organization. Michael interrupted to challenge the effusive praise, encouraging the participants to focus instead on offering their critical insights for improvement.

Refocusing the participants on areas needing polish, or improvement, was a critical step. Although MWA wanted to know and build on what was working well, the meeting needed to focus on challenges, problematic issues, and areas of improvement. With the previous groundwork that had helped establish greater trust and openness, and with permission to be forthright about areas for improvement, the ensuing retreat conversations candidly revealed barriers to living out the mission and vision.

As these conversations continued, they naturally became forward-looking and focused on a new set of core organizational values needed to operationalize the mission and vision. The following five key values emerged from the retreat culture conversations:

> » INTEGRITY: Always do what's right.

> » TEAMWORK: Collaborate! Together, we will address opportunities and challenges.

> » POSITIVITY: Bring my best to every task, every day. Bring out the best in my colleagues.

> » INNOVATION: Forge a new path. Evolve!

> » LEADERSHIP: Set the example. Everyone's a leader.

Going forward, these values would provide the clarity of expectations for which the entire organization would be held accountable. These core values established the yardstick by which everyone would be measured throughout the organization. These values formed the basis for performance evaluations and were intentionally tied to praise and recognition, as well as discipline and accountability. Previously, performance appraisals were annual and didn't connect to core organizational values. However, the new culture habit included quarterly staff evaluations that were centered on the values. Values-based discussions and disciplines even became a culture habit accepted by union stewards and representatives.

The values were rolled out with style and substance, which included an initial high energy rally, followed by a series of trainings to help everyone understand the agency's definition of these values and what it meant to live them in the workplace. The trainings included many real-world scenarios and simulations where the espoused values and lived values could be put to the test. The trainings took on the form of "strength and conditioning for culture," an applied "culture workout" of sorts designed to have employees translate the values into optimal performance behaviors and practices for their day-to-day work.

The training experiences were followed up with recognition and affirmation of the values in action within the culture. The intention was to consistently highlight and reinforce the new MWA values in action, from a quick sticky note on a door or locker, to a more formal recognition where staff receive challenge coins for going above and beyond, to an "everyday heroes" committee that accepts nominations from peers who recognize their co-workers quarterly for demonstration of the values.

Transforming Strategic Planning and Implementation

Identifying the shared values did not miraculously change the culture overnight. Artifacts of the previous dysfunctional MWA culture continued to battle with the new values-driven culture. Intentional culture is always a process of establishing more intentional habits for achieving the organization's mission. The Excellence with Integrity Institute's framework asserts that intentional organizational culture—our values in action—requires clarity of expectations, habits, accountability, and mindset. This means that new, intentional habits must root out past dysfunctional culture habits. The old MWA culture showed up in more ways than just grumbling comments and tense meetings. It surfaced in all aspects of organizational life, including the MWA's biennial strategic plan. Previously, the plan would often contain as many as 100 objectives, but very few were high-level initiatives. None of them were cross-departmental in a way that would require people from different areas of the organization to work together.

In some cases, objectives were submitted that had actually already been completed and therefore weren't forward-looking at

all. It had become little more than a "check the box" exercise with little strategic value. As the famous saying goes, "Culture eats strategy for lunch." Or, as the Excellence with Integrity approach argues: intentional culture shapes and unintentional culture corrupts. In the past, the dysfunctional culture had clearly corrupted strategic planning at MWA.

Given that "teamwork" was among the new core values for MWA and that there was still much work to be done in continuing to dismantle silos and divisions throughout the organization, a new and innovative approach for strategic planning and implementation was conceived that would not simply get the objective done, but would also build communication and collaboration among diverse stakeholders through the process.

So, for the objectives outlined in the most recent two-year strategic plan, some objectives would be assigned to the most logical choice of person or department. But in other instances, in an effort to promote communication, collaboration, and the breaking down of internal silos, objectives were intentionally assigned to an internal group, department, or person other than the one which would seem the natural choice.

For example, putting public affairs in charge of a major landfill objective, or putting landfill operators in charge of a finance objective would force two departments or groups, that previously had little or no interaction, work together collaboratively to achieve the objective. They would have to understand the nature of the work and challenges faced by employees in other areas of the organization and would naturally come to realize that every employee has a vital role to play in organizational success. The most recent strategic plan consists of 32 objectives distributed under six big-picture goals.

Needless to say, many were "freaked out" about taking the lead on one or more objectives that felt completely outside their normal operational comfort zone. Establishing cross-departmental collaboration on many strategic objectives felt like a very big ask, and it left many feeling panicked about taking the lead on objectives far outside their comfort zones. It was a watershed moment in the culture change process.

GOAL ACHIEVEMENT THROUGH GOAL MAPS

The cross-departmental goal achievement process needed the right tool to ensure its effectiveness; otherwise, MWA risked undermining confidence in the new culture and undermining organizational effectiveness in achieving its goals. The *Excellence with Integrity Goal Achievement Process & Goal Map* were the tools chosen for this essential culture task. In simple terms, a "tool" is a more efficient and consistent

way to do a job. Craftsmanship in any field is almost always predicated upon the availability of effective tools. The *Excellence with Integrity Goal Achievement Tools* have been evolved over many years working on diverse types of individual and organizational goal-achievement challenges. What follows is a brief summary of the background informing these tools.

Anyone can set goals, but few consistently manage to achieve their goals. It is a key distinction that makes all the difference to moving forward. It's not rocket science, and in some ways is so obvious it is simply overlooked. Goal setting often doesn't work because listing off a set of goals is not the same as mapping a specific plan for achieving them. *The Excellence with Integrity Goal Achievement Process* lays out the steps needed to achieve one's goals.
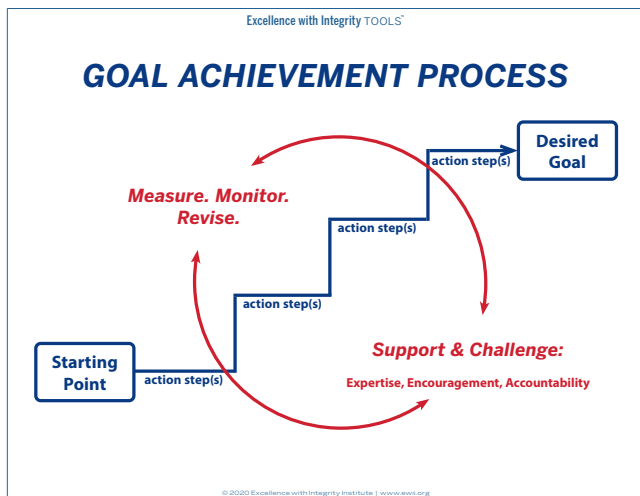
No matter what one is trying to achieve, no matter what challenge needs to be overcome, it begins by figuring out the current position (or starting point) and the desired destination (or end-goal). Then the major action steps must be identified to get from the starting point to the end goal. These major action steps need to be broken into smaller, actionable tasks. The more complex the goal, the more extensive the major action steps, and the more nuanced the smaller actionable tasks.

Once a plan is put into action, it must be continuously measured and monitored to track progress and make changes as needed. This is where many goal setting processes fail. Measuring and monitoring is essential for making sure one is on the path to their goal, and for recalibrating implementation plans as needed. The more elaborate a goal, the more elaborate the plan—the more diverse types of expertise, accountability, and encouragement are needed to stay on track.

At the simplest level, a map helps one get from here to there, from where one is to their desired destination. A "goal map" is used for the same reason. The *Excellence with Integrity Goal Map* provides a template for mapping out a series of action steps that guide one from where they are all the way to where they want to get to in the achievement of their desired goal.

The action steps are the things most in one's control, and the things one can most easily adjust if they get off track. Recording the action steps in sequence helps in two ways. First, it ensures all aspects of what will be needed are considered in the creation of a plan. Second, it becomes a document used for ongoing monitoring (and modifying) along the way.

Once a goal map has been created, it is essential to continuously calibrate the map to ensure that it is accurate. The *Excellence with Integrity Goal Map Checklist* helps with the creation and calibration of one's goal map. Specifically, the checklist portion of the Goal Map helps verify the following:

- The desired goal is specific and measurable.

- An accurate understanding of the current-state position has been used. With an accurate starting point calibration, no matter how bad or difficult the position might be, an accurate plan for reaching the desired state can be created. With an inaccurate current state description, key action steps will be ignored or omitted.

- Identification of the major action steps required, broken down into achievable, smaller steps.

- Clear definition of roles (who does what), workflow (what comes first), and timeline (when each step happens) are worked out.

Goal Mapping at MWA

A famous quote by Archilochos says, **We don't rise to the level of our expectations, we fall to the level of our training**. New shared values produced a new set of high expectations for strategic planning and collaboration among departments with little experience in such a highly creative task. In order to prepare the culture to rise to the new expectations, MWA had trainers from The Ray Center at Drake University conduct a two-day training at MWA on the use of the *Excellence with Integrity Goal Mapping and Goal Achievement Process*.

The additional training was welcomed at MWA where many were feeling like a very lean team had a lot of high-level objectives to accomplish in a short amount of time, which would have been a challenge with a "business as usual approach." The additional expectation of cross-departmental collaboration could have thrown the culture from growth mode into panic mode. The intentional training focused on the adopting culture habits needed for the new way of doing business. These habits ensured that MWA would meet the new expectations with optimal performance.

Empowered with new knowledge and tools, MWA teams were assembled to work on each Goal Map. The *Excellence with Integrity Goal Achievement Maps and Process* have become part of the way MWA teams work collaboratively to identify and accomplish their goals. In the words of MWA leaders:

Although fairly simple in nature, I'd never used a goal map before. And, if you haven't used one, if you're not writing down your processes, then you miss things. Having it laid out like that, mapping all the steps, all the pieces in one place, and then returning to them, it creates consistency. The process is brilliant.

They described the experience of a talented, smart engineer who adopted the goal mapping process:

The goal map was really an "a-ha process" for him. He's one of the smartest people we know. And this process changed the way he approaches objectives, and large level challenges. He had never previously considered what happened before he touched a project, or what happened after he touched a project. He had always focused on his portion of a project, rather than driving entire high-level objectives. So, the tool really helped him learn how to break something very large into different steps, and think through who he needed to involve well in advance. And with the use of the tool, he grew tremendously more confident in his role within the agency. The goal map appeared to be the missing piece, which then allowed him to organize his thoughts. On some level, the mapping process even gave him the permission he required to request help from other departments.

Below is one example of the 20+ diverse goal maps created by the MWA team.
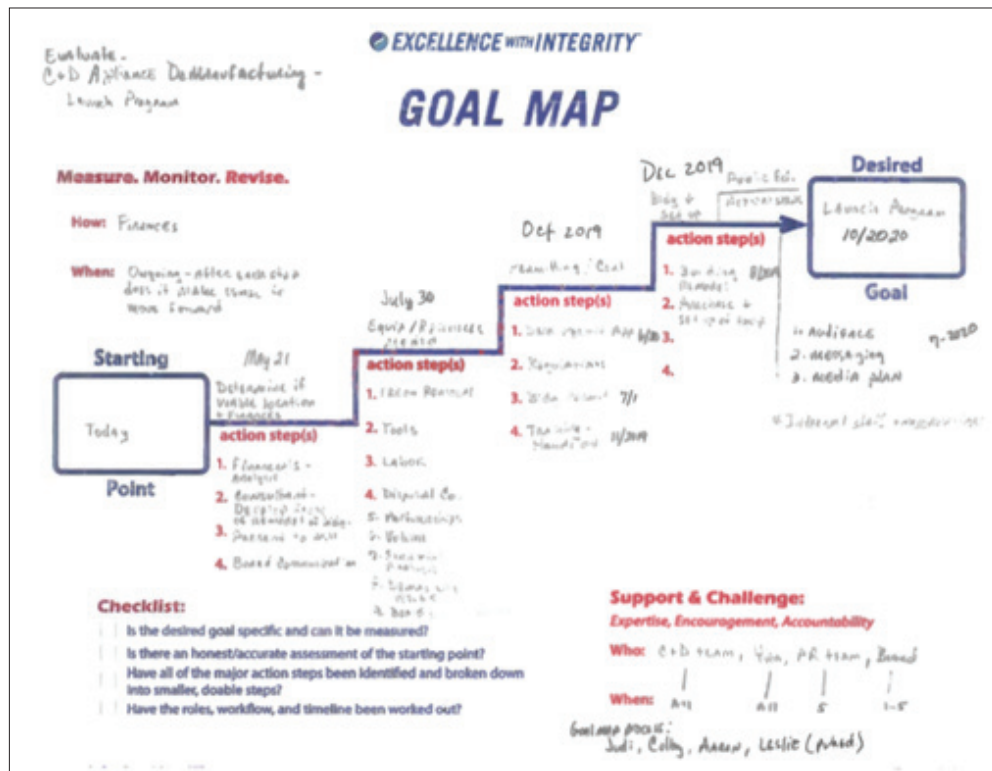
The teams at MWA responsible for creating and implementing their goal maps are incredibly diverse, bringing together people from different areas in the organization—people who had never worked together in close collaboration to achieve a specific objective.

The shared knowledge and tools ensure the efficiency and consistency. The process and tools generate maps, which hold the culture together through concrete steps, timelines for completion, and management of roles and responsibilities. The tool has become an MWA culture habit, which brings a sense of confidence and competence for a new way of doing things, which at first felt like an impossible expectation. MWA leaders describe the transformation of the culture this way:

> *[When this process started] it was inconceivable how everybody owned their little kingdom. [And] there was zero empathy or collaboration in the organization. Now, there's mutual respect across the board.*

MWA manages progress by reporting on a featured goal map each management meeting. During this sharing period, it's clear to see based on the dates written onto the MWA goal maps if the objective is ahead, behind, or on track for completion. The MWA management team created this forum, so the responsible party can discuss challenges, barriers, and successes. This accountability factor has been essential in keeping the process moving in the right direction. MWA has added its own accountability measures to enhance sus-

tainability and ongoing impact of the *Excellence with Integrity Goal Achievement Process*. The leaders provide very concrete examples of how it works:

> *So, here's an example that happened last week: a manager presented their goal map, and they essentially read the goal map that they had shared the month before. And so, we said, "The goal map is great; it makes complete sense. However, what have you moved the needle on since you created the goal map last month?" Based on this timeline, the first two steps should be completed.*

The accountability for the process has transformed the culture in part by making it clear that the MWA culture, the **MWA Way**, is collaborative and collegial, but that the expectations are unwavering.

MWA leaders are quick to point out that the accountability has helped to "move on" people who can't or won't take responsibility for the new standards of excellence. But, it has also "moved up" people empowered by the culture. They explain:

> *We've had people who have left the organization because they were being held accountable to function in a new way; their old ways were no longer acceptable.*
> *But, some are moving on because they're now empowered by our culture for bigger and better futures than what we can currently offer.*

CONCLUSION

The leadership at MWA is transforming a very complex culture. The leaders have shaped the new culture by:

- establishing clarity of expectations around a new set of core values;

- implementing new knowledge and habits (like the Goal Achievement Process), habits that fundamentally changed how people work together;

- building in accountability for the new values and habits, ensuring that what matters is celebrated, monitored, and measured;

- changing the mindset around the why and the how of the MWA culture.

MWA leaders have "modeled the way" in their own actions and their willingness to learn first-hand the experiences of others in the organization. They have also modeled the way by seeking the outside expertise needed for strengthening the culture in the service of its bold vision. The executive coaching, training, and facilitation by The Ray Center in conjunction with the culture-shaping *Excellence with Integrity Tools* have provided MWA the core culture strengths it needs to reach its goals.

The right tool at the right time really can make all the difference, which was the case at MWA. The tools and processes may appear simple, but they are not easy to implement right. *Excellence with Integrity Goal Achievement Process* and related tools are but one of the many *Excellence*

with Integrity Tools designed to shape the culture by establishing **C**larity of Expectations, Intentional **H**abits, **A**ccountability, and **M**indset, which leads to **P**erformance (the CHAMP tool).

As the MWA leaders put it, "You could plug everything we've done into the CHAMP Tool and say 'this is how we built our culture.'"

The impact of the Goal Map tool has been truly profound at MWA. Whole new levels of empathy, tolerance, and mutual respect are developing—all of which feeds into everything else MWA has been doing to transform its organizational culture. The tool has had a very immediate, practical impact of providing a framework for getting things done, but it all fits neatly into a much bigger picture of cultural change in the organization. When the tool fits into a larger story in this way, it is suddenly invested with much more meaning than it would otherwise carry outside of that story.

It is both humbling and profound to understand the "a-ha" moments experienced by so many team members at MWA as they use the *Excellence with Integrity Goal Process and tools*. When the culture is shaped intentionally, and the people are trained to meet the high expectations, fears are alleviated, resistance is removed, and collective confidence and competence ensue. In the final analysis it is all about the tool—not in isolation but as one strand in an ongoing weaving, an unfolding story of organizational change towards optimal performance.

Despite the COVID pandemic, MWA has continued to enhance culture shaping efforts in collaboration with The Ray Center and the Excellence with Integrity Institute with an intentional focus on Customer Care and Executive Coaching setting up the opportunity for the next phase of strategic planning.

Excellence with Integrity™
I N S T I T U T E

216 Fayette Street, Suite 1, Manlius, NY 13104
Phone: 315-692-8054 | email: info@ewii.org

Excellence with Integrity TOOLS™ is the trademark of the Excellence with Integrity Institute.

Drake | The Robert D. and Billie Ray Center
UNIVERSITY

The Robert D. and Billie Ray Center | Drake University
Collier-Scripps Hall, 2702 Forest Ave., Des Moines, IA 50311
Phone: 515-271-1910 | email: raycenter@drake.edu

ABOUT THE CONSORTIUM

More than a decade ago the Excellence with Integrity Institute and The Robert D. and Billie Ray Center at Drake University created a consortium partnership to advance our respective visions and missions. Together, we pursue strategic opportunities in youth leadership, employment and STEM readiness, athletics, education, and organizational development in community and workplace environments.

The Institute's main focus is on research and development of instructional resources, assessment solutions, and tools and strategies for organizational culture development.

The Ray Center's main focus is on coaching, training and expanding our collaborative implementation projects across Iowa and the nation.

www.ewii.org
www.drake.edu/raycenter