

Taking Stock and Standing Down

By Tom Peeler, CPPB

Standing down is an action the military takes to review, regroup, and reorganize. Unfortunately, it often comes after an accident or other tragic event. To stop losses, the military will “stand down” until they are confident they can resume safe operations.

Standing down is good for everyone, not just the military. In today’s fast-paced world, we seldom take time to stop and reflect on what is happening in our lives. Instead, we tell ourselves that we are too busy today. Tomorrow will be better. Inevitably, we will be even busier tomorrow.

Under the guise of having too much to do, we avoid standing down. Yes, we are busy. We’re even accomplishing a lot. However, we are not taking time to determine if we are doing things effectively, efficiently, or with the right priority.

I am an advocate of standing down. Whether it is organizationally or individually, we need to stop periodically to take stock of where we are and where we’re headed. Rather than slowing progress, standing down may help us discover that we are not even moving in the right direction.

Standing down may be a formal activity, time purposely set aside for planning and assessment. It is often done as annual goal setting and performance review. Or formal standing down may rise from an unexpected significant event. In either case, formal standing down is generally done in accordance with organizational standards, forms, and instructions. It is the process we use to determine how we are doing and what we plan to do.

We may also stand down informally. We do so when our gut tells us that things are out of control. Although we’re busy and we’re accomplishing the work is getting



done, the nagging feeling that everything is not okay, or not as good as it could be, will not go away.

Informal standing down is generally not guided by standards, forms, and instructions. It involves closing your door for uninterrupted personal analysis and review. It is a brief team meeting to get everyone on the same track. It entails lunch with a coworker to discuss needs. It is whatever it takes to get that little voice in your head to stop screaming, “Stand down! You’re losing control.”

Making It Work

Standing down effectively requires four key components: (a) a vision of where we want to go, (b) the best route to reach our destination, (c) confirmation that we are on course, and (d) breaks.

A vision of where we want to go: Try routing a trip without a destination. It’s impossible. All routes lead to chaos.

Organizations and individuals must know where they’re headed to determine the best way to get there. The destination may change along the way, but without a vision, we can’t effectively start the journey.

The best route to reach our destination: Effective mapping considers distance, conditions, resources, and contingencies. We will only find the most appropriate route to our final destination with effective mapping.

We map with goal setting, processes, and procedures. These key elements help us move toward our desired destination. Without them, we have neither the direction nor the resources to get there.

Confirmation that we are on course: By making one or two wrong turns, we can seriously veer off course. The sooner we discover the error, the more quickly we can correct it. The more quickly an error is discovered and corrected, the sooner we are back on course toward our destination.

We confirm our course through measurement. We have our vision. We have our goals, processes, and procedures. Now, we must periodically determine if those goals, processes, and procedures are moving us toward our vision. We do that by measuring the results of our activities. If measurement indicates that we are achieving the goals, we are on course. If measurement indicates that we are off course, we must make the appropriate changes to get back on track. Additionally, if measurement reveals a better course, we must remap the trip and take advantage of the better solution.

Breaks: Some destinations require long journeys. Traveling nonstop can be unsafe and ineffective. Breaks may be planned for specific intervals or locations or they may be spur-of-the-moment when an inviting rest stop appears at the side of the road. Either way, breaks are essential for remaining alert and on course.

We take breaks in a number of ways. Coffee breaks and lunch periods are often planned into the workday. Brief conversations to catch up on what is happening can be effective breaks. We also have weekends, personal days, vacation days, and holidays that give us a break from the action. Taking advantage of these opportunities is essential to organizational and personal well-being.

There are also unplanned breaks. When you feel overwhelmed, taking a few minutes for yourself or asking the boss for a few minutes of his or her time can help eliminate stress or reveal a solution. However, always respect organizational rules and the chain of command in those situations.

A Life Change

We also need to stand down in our personal lives. The demands of family and friends, extracurricular activities, meetings and appointments, and unforeseen situations can be overwhelming. Combining work stress with personal stress can be too much for anyone. Taking time to stand down is good for both the individual and the organization.

Standing down . . . are you doing it? I hope so because you are the most valuable asset to your organization and your family. They, and you, will benefit greatly from the physical, mental, and professional health achieved from periodically standing down.

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Congratulations to Shirley Broz



ASBO Board of Directors member Shirley A. Broz, CPA, RSBA, was recently appointed chief financial officer for Rockwood School District in Missouri. Shirley, who has been serving as Rockwood’s executive director of finance, received unanimous

approval by the board of education, and will begin her new duties on July 1.

Shirley has been with the Rockwood School District for 13 years. She has a CPA, RSBA, and master’s degree in business. In addition to her responsibilities with the Rockwood School District, she teaches accounting at Webster University.

In announcing the appointment, Rockwood’s superintendent, Craig Larson, said, “Few people in Missouri have Ms. Broz’s qualifications and none of them understand Rockwood’s financial structure or have the relationships with Rockwood’s stakeholders that she has developed over the past 13 years.”