



Switch Framework

Tool and Template to Support Change Management

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Overview

Purpose of Tool

Change is constant, and making strategic shifts that stick in a district requires thoughtful planning, intentionality, and an asset mindset. While there are many tools and studies on change management practices, we are sharing an example based on *Switch: How to Change Things When Change is Hard* by Chip Heath and Dan Heath. This “Switch-Change” framework identifies a menu of considerations Chief Innovation Officers pay careful attention to when leading and managing change. This menu includes nine considerations for managing change. A district leader overseeing innovation is often navigating through these nine considerations, sometimes considering all nine (as in the example below) or sometimes thinking through missed opportunities or areas that need revisiting.

Definition of Change Considerations

A table with the nine considerations to address both rational and emotional components of decision-making behavior. This table unpacks the considerations with a brief definition and a question to ask yourself when you are planning for, reflecting on, or addressing ongoing change.

Completed Example

This is a completed example of the Switch Change Framework by an SGS district that was developing a Quality Seats Analysis that builds buy-in and ownership within their district.

Blank Example

Finally, there is a blank template to use when considering upcoming change in your own region.

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Definitions of Rational and Emotional Components of Change

Direct the Rider: Rational Side	
Find the Bright Spots	Identify parts of the change you are already doing well to find transferable skills, build momentum, and spark hope that change is possible. Ask: <i>What are we already doing well and how do we do more of it?</i>
Script the Critical Moves	Remove ambiguity and over-analysis around action and define what tactical, concrete steps will be taken to make the change. Ask: <i>What clarity around <u>how</u> the change will occur can be provided to dissolve resistance?</i>
Point to the Destination	Describe a compelling destination that speaks to emotional resonance. This speaks to the Rider by providing clarity about where you are headed and shows the Elephant why it is important to get there. Ask: <i>What are we setting out to achieve that is incredibly inspiring?</i>

Motivate the Elephant: Emotional Side	
Find the Feeling	Speak to emotions when influencing change, in order to encourage open minds, creativity, and hope. Ask: <i>What might be done so stakeholders feel excited about the possibility of the change?</i>
Shrink the Change	Motivate action by making the change more attainable by breaking the change into smaller pieces, illuminate where the path to change is shorter, and celebrate small, targeted wins on the path to the greater destination. Ask: <i>What can we attain more easily in order to build hope and momentum?</i>
Grow Your People	Inspire your people to feel more determined and capable to achieve the goal so they have the fortitude to act. Communicate the expectation of struggle and model and encourage a growth mindset. Ask: <i>What skills do we need to grow together and what pitfalls are to be expected that will require grit?</i>

Shape the Path: Environmental or Situational Factors	
Tweak the Environment	Look for ways to adjust the path to facilitate the desired changes rather than assume people do not want to make the desired change. Ask: <i>What can be done to smooth the journey towards the new goal?</i>
Build Habits	Decide when and where pieces of the new plan will occur. What norms, policies, roles, or responsibilities will be added to codify how the work will occur? Ask: <i>How might habits be created to simplify the integration of the new behavior?</i>
Rally the Herd	Share a compelling message about what is happening to create a constituency of supporters for the change who can influence and motivate others when necessary. Ask: <i>Who can champion what is different and better about the change we seek and how can they help reform?</i>

Switch Change Framework - Exemplar ISD Quality Seats Analysis (QSA) Planning

Below is an example of how the Switch-Change Framework can be used to effectively plan for and drive change that sticks. Use this example to prepare for and conduct a quality seats analysis (QSA) and annual school planning process as a guide to increase buy-in and ownership within a district. While reviewing this exemplar, please reflect on the following:

→ How can you use this exemplar to help guide your next steps in developing your district’s QSA? In what ways can this exemplar help you champion a new way of working and planning as a district?

Direct the Rider: Rational Side	Motivate the Elephant: Emotional Side	Shape the Path: Situation/Environment
Find the Bright Spots	Find the Feeling	Tweak the Environment
<p>Change is difficult because we don’t know what to change to; replicate successes</p>	<p>You can’t analyze exactly, but you must instead feel excited about change</p>	<p>Make the path to success smoother instead of blaming people</p>
<p><i>List successes to replicate</i></p> <ul style="list-style-type: none"> ❖ Multiple team members from the Cabinet on down regularly pull and use their own data to inform decisions ❖ The district has already committed to surveys and engagement to better understand students’ and families’ wants and needs ❖ There is already a range of academic models and an interest in innovative school models to attract and retain all students in the region. There is interest in deeply understanding the drivers behind what models families choose and why ❖ The district utilizes a demographer to understand birth trends and broader factors that drive enrollment over time 	<p><i>List ideas for creating excitement</i></p> <ul style="list-style-type: none"> ❖ Solve a problem: The QSA will alleviate lots of one-off data requests and manual pulling—will include messaging about how this process will be more efficient and solve for existing data needs and enable ability to easily answer questions about the district ❖ Show what’s possible: Share QSA exemplars from other districts and the exciting actions and results they’ve gotten through those actions ❖ Rally around the North Star Goal: Galvanize excitement through your commitment to a shared goal and discuss how the QSA can help you grow what’s working and identify gaps or new needs of the district ❖ Meet their needs: Given the interest in attracting and retaining students, discuss how this QSA and annual school planning process will help create the schools students and families want and need 	<p><i>List ways to tweak the environment</i></p> <ul style="list-style-type: none"> ❖ Use existing QSAs to show what is possible rather than bemoaning the current manual data access and aggregation process across multiple systems ❖ Make data more accessible by compiling it and doing so in a way that is easy to refresh on a quarterly basis <ul style="list-style-type: none"> ➤ Identify which data should be updated quarterly to clarify expectations about what ongoing updates and progress can be captured ❖ Seek to minimize meetings by integrating QSA discussions into pre-existing meeting times and strategic conversations, rather than having one-off QSA-specific conversations ❖ Once completed, decide what existing data systems, reports, or other practices can be “retired” now that there’s a new data centralization tool

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Script Critical Moves	Shrink Change	Build Habits
<p>Make sure everyone knows how to change</p>	<p>Make the change easier by making many smaller goals to achieve</p>	<p>Make the change habitual so there is less conflict</p>
<p><i>List how you will help people move toward change</i></p> <ul style="list-style-type: none"> ❖ Conduct 1:1 and whole group conversations to understand the current practices, needs, and desires around data, data utilization, and district-wide planning ❖ Solicit data from a wide range of sources and bring them together in one place to create a more complete picture of school and district successes and gaps/needs ❖ Engage and equip the Data Fellow to help with some of the data pulling and meaningfully involve them in the QSA process to build capacity and expertise ❖ Continually articulate a North Star Goal to anchor the district’s data conversations, progress monitoring, and action planning ❖ Prepare for and conduct internal and external engagement to share the North Star Goal and the “why” behind the work 	<p><i>List how you will shrink the larger change into smaller pieces</i></p> <ul style="list-style-type: none"> ❖ Inventory current data sources, including publicly available state data ❖ Create a QSA template or dashboard that can be refreshed that pulls together the various desired data sources into one place ❖ Invite the Data Fellow to conversations about the QSA development to start building local capacity and to ease access to data ❖ Align existing school planning and progress monitoring structures, as able (e.g., SIP goals aligned to the North Star Goal) ❖ Develop a shared project plan for the QSA with clear owners and dates that make the “annual cadence” actionable and comprehensive in planning for the Cabinet, board meetings, etc.; the CIO will do the ongoing project management 	<p><i>List how you will build habits</i></p> <ul style="list-style-type: none"> ❖ Create an annual cadence for the QSA conversations and ensure they show up on the appropriate Cabinet and board meetings (e.g., a quarterly refresh of the data and update to the Cabinet and board), as well as having aligned external engagement to discuss progress toward a shared North Star Goal and priorities ❖ Build QSA and annual school planning time into Cabinet meeting agendas to utilize existing meeting space to discuss the analysis, ask questions, and collaboratively plan for school actions ❖ Create a list of questions to guide the quarterly reflection to continually come back to 1) progress toward the North Star Goal, 2) growing what’s working and eliminating or pivoting away from what is not, and 3) articulate key messages to share with internal and external stakeholders about progress ❖ Enable automation and other information systems integration, where possible, to make refreshing the QSA automatic and regularly occurring
Point to Destination	Grow Your People	Rally the Herd
<p>Make sure you know what the end of change is</p>	<p>Appeal to an identity that makes people feel strong and competent</p>	<p>Make sure everyone is onboard with the change because otherwise, they may follow others</p>
<p><i>List your destination and how you will point to it</i></p> <ul style="list-style-type: none"> ❖ Through developing the QSA, the district has “one source of truth” that brings together data from multiple sources and provides “snapshot” and trends data from which to make informed, proactive decisions as a district 	<p><i>List how you will train and develop people</i></p> <ul style="list-style-type: none"> ❖ Provide an introductory QSA and annual school planning overview for the Data Fellow and any Summit attendees who want a refresher 	<p><i>List how you will rally people around the change</i></p> <ul style="list-style-type: none"> ❖ Plug the QSA conversation into the broader district strategic plan. Make clear the QSA and school action planning are part of how you achieve your mission and vision

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<ul style="list-style-type: none">❖ The district uses their QSA data to plan for and codify their key priorities, goals, and action steps to advance toward a shared North Star Goal through the annual school planning process❖ The district’s vision and goals are anchored in data that can be tracked and reported on with regular updates about how the district is progressing and where the district is off-track❖ Cabinet, board, and other internal and external meetings regularly have updates on progress and strategic, timely conversations about how to build off of what’s moving in the right direction as well as where there may need a pivot or pause to move toward shared goals	<ul style="list-style-type: none">❖ Encourage the district to sign up for the “Annual School Planning” professional learning pathway with TEA/DSSI❖ Leverage EA and exemplars from other districts to help analyze the data, pull out trends, and facilitate conversations about the QSA findings and school action considerations❖ Utilize support from the Center for School Actions for any school actions under consideration (e.g., webinars, 1-pagers, etc.)❖ Emphasize that the QSA is an ongoing process that we can continue to build out and evolve through the quarterly step-backs and is not expected to be “perfect” or fixed right out of the gate	<ul style="list-style-type: none">❖ Ensure those at multiple levels of the organization are aware of, and can help shape, the QSA❖ Parent and student voice is a key input in defining what the district wants and needs. Communicating back what you heard from them, as well as to your broader audience, can help provide compelling insights to supplement the quantitative data and trends❖ Similarly, educator voice and perspectives are important to capture and share
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Adapted from Praxie: <https://praxie.com/switch-change-framework-online-tools-templates/>

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Switch Change Framework

Review the framework and list how you will address each element as part of your change process. Then, create a time-bound plan for addressing the strategies you identified.

Direct the Rider	Motivate the Elephant	Shape the Path
Find the Bright Spots	Find the Feeling	Tweak the Environment
Change is difficult because we don't know what to change to; replicate successes	You can't analyze exactly, but you must instead feel excited about change	Make the path to success smoother instead of blaming people
<i>List successes to replicate</i> ◆ ◆ ◆	<i>List ideas for creating excitement</i> ◆ ◆ ◆	<i>List ways to tweak the environment</i> ◆ ◆ ◆
Script Critical Moves	Shrink Change	Build Habits
Make sure everyone knows how to change	Make the change easier by making many smaller goals to achieve	Make the change habitual so there is less conflict
<i>List how you will help people move toward change</i> ◆ ◆ ◆	<i>List how you will shrink the larger change into smaller pieces</i> ◆ ◆ ◆	<i>List how you will build habits</i> ◆ ◆ ◆
Point to Destination	Grow Your People	Rally the Herd
Make sure you know what the end of change is	Appeal to an identity that makes people feel strong and competent	Make sure everyone is onboard with the change because otherwise, they may follow others
<i>List your destination and how you will point to it</i> ◆ ◆ ◆	<i>List how you will train and develop people</i> ◆ ◆ ◆	<i>List how you will rally people around the change</i> ◆ ◆ ◆

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