**Change Management Diagnostic**

**Purpose of this Tool:**

Effective change management is critical to the success of all school actions. All the work you do in your planning year will impact change management for your school action, whether directly or indirectly. By setting out with a clear framework and vocabulary for change management, however, you will be able to A) more effectively align your planning year efforts to support key conditions for change for your school action, and B) identify and address any gaps in your change management strategies early on to set yourself up for success.

The purpose of this tool is to define the key conditions for change at the district and campus level, as well as help you reflect on your current state so you can build forward-looking change management strategies into your planning process. Outputs and next steps from the diagnostic exercise will flow into your Planning Year Project Plan and/or your Stakeholder Engagement and Communications Plan, which you will continue to revisit and refine throughout the planning process.

**Instructions:**

For each key condition for change, use the diagnostic worksheet to:

1. **Reflect on the current state** at the district and campus level,
2. **Brainstorm potential strategies** for effective change management, and
3. **Identify actionable next steps** to land in your planning year project plan and/or stakeholder engagement and communications plan.

You can refer to Appendix A for definitions of each key condition for change, and refer to Appendices B and C for prompts to help you reflect on your current state and brainstorm potential strategies.

**Bookmarks:**

* [Diagnostic Worksheet](#py6sj4fcqosy)
* [Appendix A: Conditions for Change Framework & Definitions](#5amw1779hqpn)
* [Appendix B: Prompts for Reflecting on Current State](#sp5wq7b61k5g)
* [Appendix C: Prompts for Brainstorming Potential Strategies](#tfffrdymmbf2)
* [Appendix D: Example Next Steps](#29qlrhgv0h3k)

| **Diagnostic Worksheet - Current State, Strategies, Next Steps** |
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| **Conditions for Change** | **Current State** | **Strategies** | **Next Steps** |
| **Conviction** |  |  |  |
| **Clarity**  |  |  |  |
| **Capacity**  |  |  |  |
| **Coalition** |  |  |  |
| **Culture** |  |  |  |

**Appendix A: Conditions for Change Framework & Definitions**

* **Conviction**:
	+ District and school leaders believe the identified campus is in need of comprehensive and bold change to improve learning and life outcomes for its students, and are committed to carrying out all aspects of planning and implementation for the selected school action in order to meet this need.
* **Clarity**:
	+ District and school leaders clearly define what success looks like for the school action campus, what role each member of the school action team plays, and what resources and strategies are available to support the school action.
* **Capacity**:
	+ District and school leaders have the skills, knowledge, and mindsets necessary to plan and implement the school action with fidelity, and they allocate people, time, and money based on the needs of the school action campus and its community.
* **Coalition**:
	+ District and school leaders actively build broad-based support for the school action and provide regular opportunities to solicit authentic input from community stakeholders, especially those most marginalized and impacted by the action, to understand community wants and needs for their campus.
* **Culture**:
	+ District and school leaders actively promote a culture of inclusion and collaboration across students, families, and staff that invites them to participate in the changes happening at their campus and builds a sense of collective ownership of the school action’s success.

**Appendix B: Prompts for Reflecting on Current State**

* **Conviction:**
	+ Is there consensus among district leadership on the need for comprehensive and bold change at the school action campus?
	+ Do all district leaders agree that the selected school action is the right strategy for meeting the specific needs of students and families at the school action campus? Is the school leader (if already selected) also on board?
* **Clarity:**
	+ Have district leaders articulated a clear vision of success for the school action campus that is aligned to the district’s overall strategy? Does the school leader (if already selected) understand this vision?
	+ Does each Central Office department have a clear understanding of their role in planning and implementing the school action and what types of support they are expected to provide?
* **Capacity:**
	+ Are district departments ready and able to provide the resources and capacity needed to support the school action from the district level?
	+ Do school leaders and campus staff have the necessary training to successfully engage in planning year activities?
	+ Does the school leader have sufficient release time to fully commit to and engage in planning year activities in addition to their other responsibilities?
* **Coalition:**
	+ Are there structures and processes currently in place to facilitate authentic stakeholder engagement with the school community? What are their overall sentiments surrounding the selected school action?
* **Culture:**
	+ What is the current culture of the district leadership team? Do they have experience supporting this type of bold change at the campus level?
	+ What is the current culture like among the school community? Are they receptive to change?

**Appendix C: Prompts for Brainstorming Potential Strategies:**

* **Conviction:**
	+ What motivates your key district and school leaders? What types of messaging will resonate most strongly in order to build conviction for your school action?
	+ Which key data points or other findings from your needs assessment can you leverage to build conviction for your school action?
* **Clarity:**
	+ What forms of internal communications and messaging will you need to build clarity among district leaders and school staff around the school action?
	+ What will be your key asks of other district departments to support the school action, and how can you ensure they are prepared to provide that support?
	+ What forms of external communications and messaging will you need to build clarity for students and families around the school action?
* **Capacity:**
	+ What types of support will you need to provide school staff to cultivate the skills and mindsets they need to adapt to and thrive in the new school action model?
	+ What training will TAs and District Leadership need to provide so that staff execute responsibilities related to the school action with fidelity?
* **Coalition:**
	+ Across different stakeholder groups, who can you count on as key supporters and advocates of the school action and who might provide resistance or pushback?
	+ How can you best leverage different members of your coalition to support the change management process?
* **Culture:**
	+ How can you bring along members of the district leadership team throughout the process to ensure a sense of collective ownership of the school action?
	+ What opportunities will you have to bring community members to the table in the school action planning process?

**Appendix D: Example Next Steps**

* **Conviction:**
	+ Develop a 1-pager or short presentation for district leadership articulating the “why” behind the school action to build conviction. Include any relevant findings from data analysis or engagement you conducted in your pre-planning process.
* **Clarity:**
	+ Create a high-level outline in your Planning Year Project Plan of roles and responsibilities for each central office department indicating the support and resources they will need to contribute to the school action. Review with department heads to ensure clarity and alignment.
* **Capacity:**
	+ As part of your Stakeholder Engagement and Communications Plan, design a staff survey to gauge current mindsets and identify areas of focus for professional development and capacity building.
	+ As part of your Planning Year Project Plan, plan a capacity-building workshop for the school leadership team to cultivate a specific skill you have identified as key to change management for your school action.
* **Coalition:**
	+ As part of your Stakeholder Engagement and Communications plan, create an overview of each key stakeholder group that includes: 1) what their main priorities are / what they care about, 2) what their general attitude toward the school action is, 3) key messaging to use with them about the school action, 4) who their key leaders/contacts are, and 5) potential opportunities to engage them.
* **Culture:**
	+ As part of your Stakeholder Engagement and Communications Plan, develop a culture survey for students, families, and staff in order to understand what they value most in terms of school culture and how you can incorporate that into your School Design Plan.