Study Guide for
Shifting: How School Leaders Can Create a Culture of Change
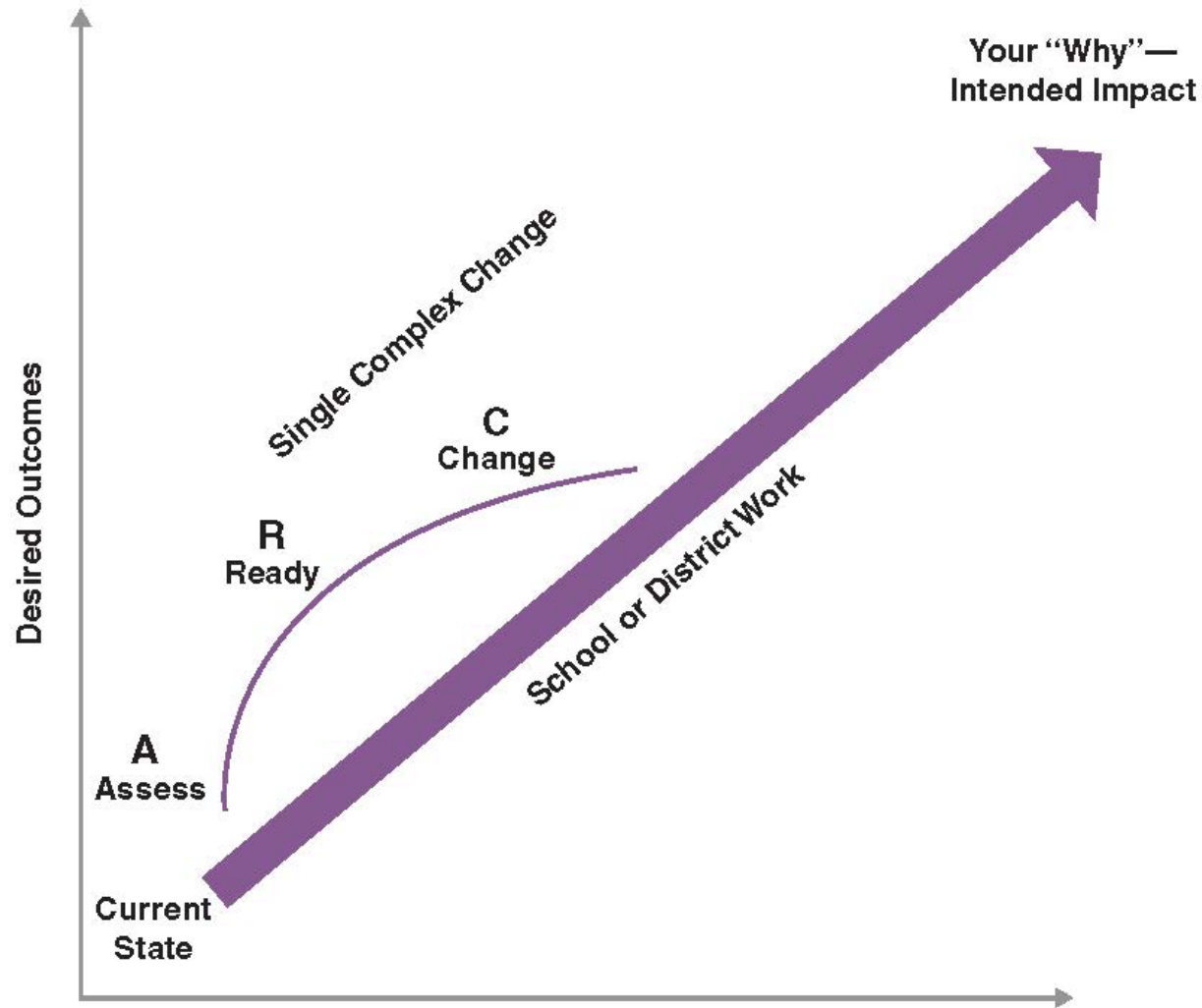
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- Welcome

- Introduction

- Assess

- Ready

- Change

- Next Steps

- Read the Preface.

- Discuss your context for this book study.
  - Establish or confirm and serve our deeper "why."
  - Gel as a leadership team.
  - Begin to increase the likelihood of change success.

- Map out a book study plan

Figure 0.2 The ARC Model of Change

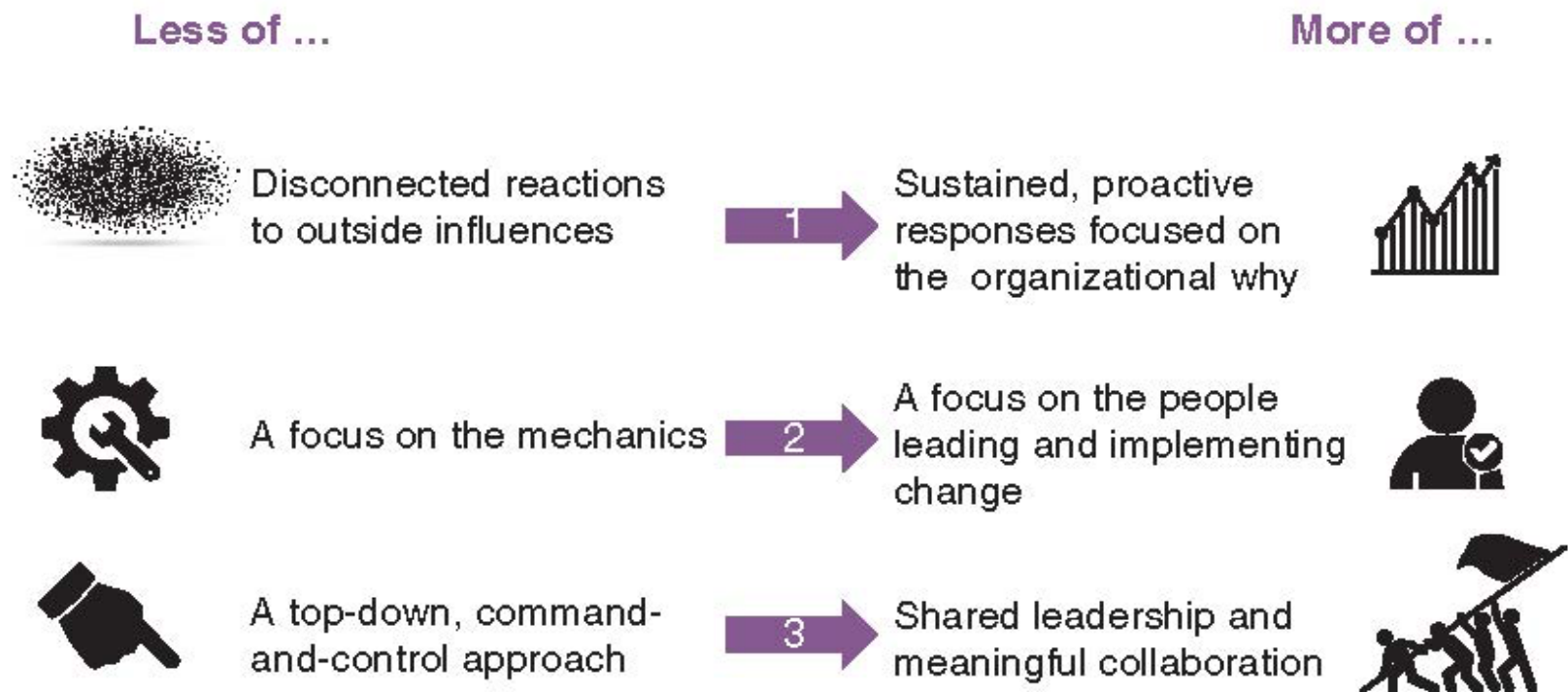# Introduction

- **Read:** Chapter 1

- **Reflect and Discuss:** Chapter 1

  - **The Big Shift:** Reread the box feature on page 9. What are you now seeing as the important differences between a traditional "Vision and Mission" statement and a "Why?" statement? What do you see as benefits of the latter versus the former?

  - **Application:** Think of your specific situation. How would you succinctly answer the question "What are we trying to achieve on behalf of our kids?"

- **Activity:** Watch [Marquet's story](#) about shifting to a "Leader-Leader" approach. Do you find yourself following more of a "Leader-Follower" or "Leader-Leader" approach to leadership?

Figure 0.1 Three Essential Shifts to Create Productive Change

Less of ...

More of ...

Less of ...		More of ...
Disconnected reactions to outside influences	1	Sustained, proactive responses focused on the organizational why
A focus on the mechanics	2	A focus on the people leading and implementing change
A top-down, command-and-control approach	3	Shared leadership and meaningful collaboration

Introduction

- **Read:** Chapter 2

- **Reflect and Discuss:** Chapter 2

  - **The Big Shift:** Most change initiatives fail because teams are almost solely fixated on managing the mechanics of the change – what they're trying to change and how they're trying to change it. Why should change leaders focus as much on the *who* of change – the people executing and leading the change – as they do on the *what* and *how* of change?

  - **Application:** Think of a past change initiative in which you were involved? Where did you or leadership tend to focus? On the mechanics or people?

- **Activity**: Do a self-audit of Figure 2.1 on page 20. Note specific examples where you are demonstrating the "Smart" and "Healthy" behaviors.

Introduction

- **Read: Chapter 3**

- **Reflect and Discuss: Chapter 3**

  - **The Big Shift:** Why and how will a school or district's culture impact its ability to effectively initiate and manage desired change?

  - **Application:** Think about the organizational culture of your school or district. What are some of the elements or indicators of that culture? Where do you see evidence of the organizational culture?

- **Activity:** Review Figure 3.2 on page 40 relative to your school or district's culture. Circle the strongest and underline the weakest characteristics. Compare your responses and discuss.

Assess

- **Read:** Chapter 4

- **Reflect and Discuss:** Chapter 4

  - **The Big Shift:** Why is the ability to pause and reflect especially in highly charged situations a critical skill regardless of where you're leading?

  - **Application:** Check in with yourself on the three neuroscience-based concepts that signal where you can get in your own way: Suppression, Cognitive Distortions, and the Inner Critic. How often do you find yourself experiencing some or all of them? Which area, if any, might you want to focus on?

- **Activity:** Take the Leadership Self-Assessment. Which of your results surprised you? Where do you feel you need to focus?

Leadership Self-Assessment

STEP 1: Take the Leadership Self-Assessment

STEP 2: Explore Your Results & Recommendations

[On paper](#)

[Online](#)

[Link to print](#)

STEP 3: Consider Your Own Experience & Be Ready to Share One Insight

Assess

- **Read:** **Chapter 5**

- **Reflect and Discuss**: **Chapter 5**

  - **The Big Shift:** One major reason why change efforts fail is because the team ultimately tried to solve the wrong problem. What do the authors advocate doing to avoid that scenario?

  - **Application:** Think about a change initiative you're considering. Using the model in the "What and Why" section on page 73, how would you articulate your purpose statement? How might you share and get input on this purpose statement with others?

- **Activity**: In a team meeting, map a potential Environmental Scan for a change effort you're considering.

Environmental Scan

Internal Organization

External Stakeholders & Influencers

Societal Landscape
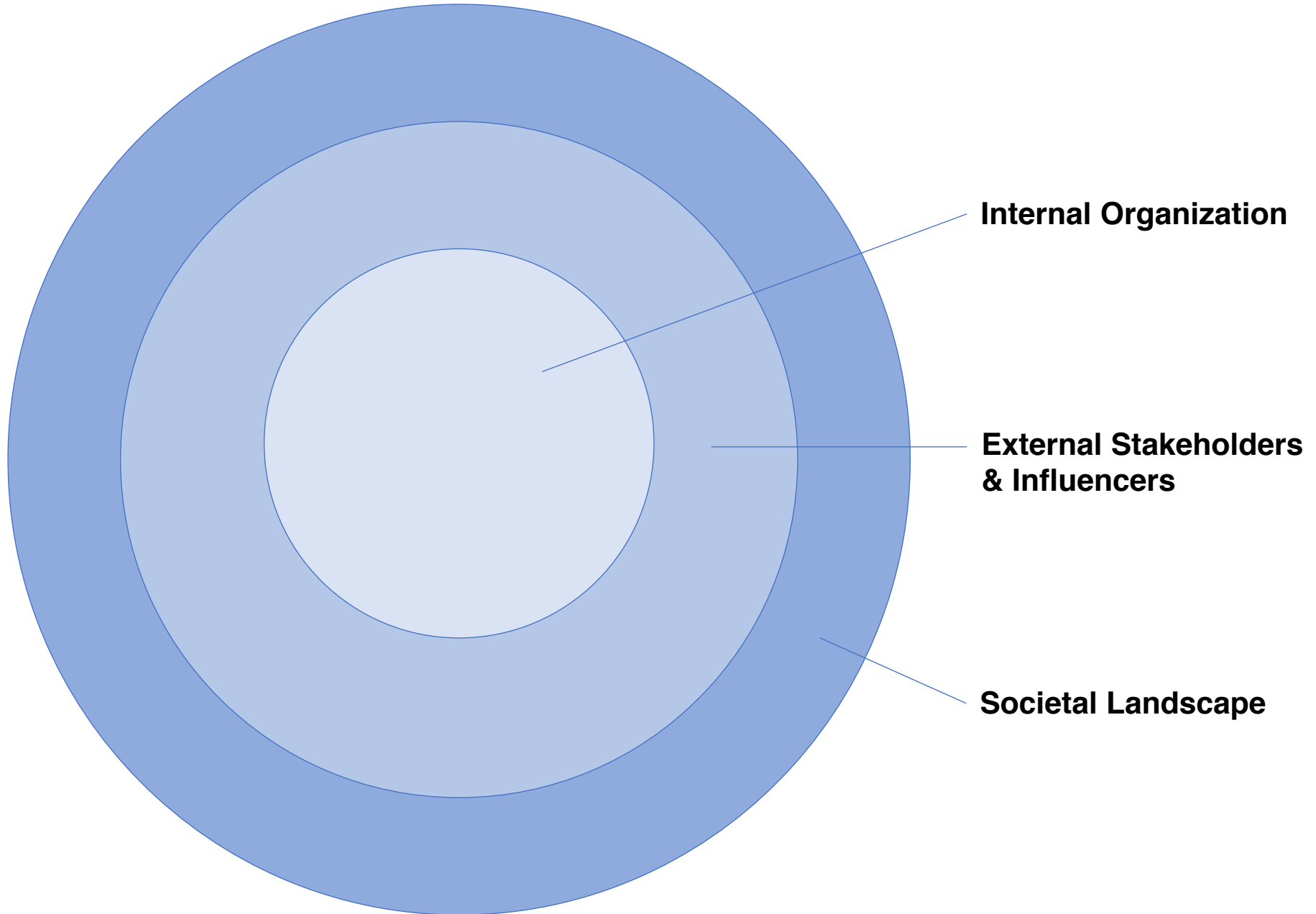
Figure 5.1 Scanning the Early Literacy Environments

Internal Organization

External Stakeholders & Influencers

Societal Landscape

Inner circle:
Teachers
Administrators
Support Staff
Technology
Buildings & Grounds
Students

Middle circle:
Parents, School Board, Community Members, Vendors, Local Businesses, Local Nonprofits, Daycare & Pre-Schools, Libraries & Town Resources, Other Schools in Your District, After School Programs & Camps

Outer circle:
School Improvement & Discipline Models, Social Trends, School Funding, Demographic Trends, Technology Trends, Social & Emotional Learning, Tech Tools for Teachers & Students, Political Landscape, Communicating With Parents, Trends in Professional Development, Best Practices for Engaging Parents, Research on Literacy Development

Ready

- **Read: Chapter 6**

- **Reflect and Discuss**: Chapter 6

  - **The Big Shift:** This chapter is all about developing a critical internal aspect of leadership – self awareness – that can then nourish productive external behaviors. Why worry about this with respect to a change initiative?

  - **Application:** Reread the "Competing Commitments" section on pages 92-93. Think of your own situation relative to a change you're considering. Where might you have a competing commitment?

- **Activity:** Review Figure 6.2 "The Critical Relationship" on page 98. Do a quick self-check on each of the areas – contemplative practices, mindfulness, authenticity, and emotional intelligence – by evaluating your behaviors along a continuum from "I need help here" to "I feel fully confident."

Ready

- **Read:** Chapter 7.

- **Reflect and Discuss:** Chapter 7

    - **The Big Shift:** Why will a top-down driven change initiative struggle to succeed?

    - **Application:** What do you see as the value of cross-functional teams? What cross-functional teams exist at our school, and what do they achieve? If cross-functional teams don't exist, how might they be created?

- **Activity:** Before your planning group meets, fill out the ARC Map as an individual. Next, meet and share worksheets, and then make a collective ARC map.

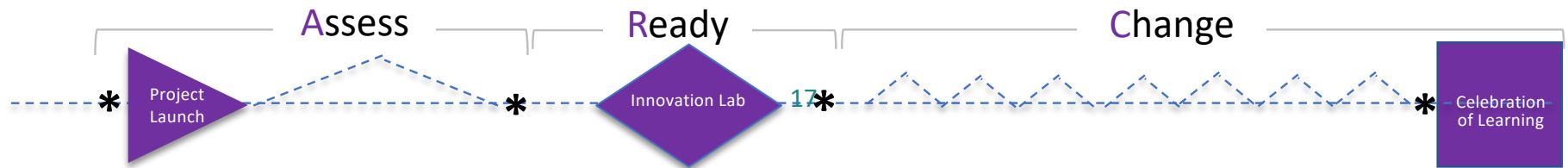# Create Your Own ARC Map for a Change Effort

Assess   Ready   Change

Explore Issue

Ideation Session   16

Share Victory
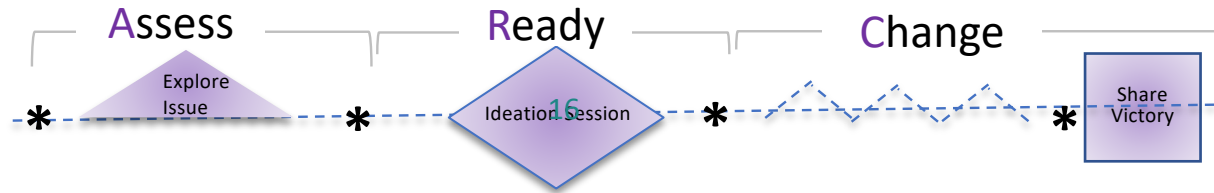
Assess [Start – End Date] _____	Ready [Start – End Date] _____	Change [Start – End Date] _____

Worked Out Example of *Complex* Change: Early Literacy (2 Years)

Assess — Ready — Change

Project Launch

Innovation Lab

17

Celebration of Learning

Assess (Year 1, July to Feb)	**Ready** (Year 1, March to June)	**Change** (Year 2, July to June)

• Set up Early Literacy project * (July)
  • Identify project goals with leadership team
• **Launch project** (September)
  • Assign core team
  • Gather initial thinking
• Scan environment (October - January)
  • Conduct internal and external stakeholders and expert interviews
  • Hold observations and site visits
  • Research trends, best practices, and recent scholarship
• Leadership self-assessment (ongoing)
  • Identify self-coaching activities
• Analyze input and data * (February)
  • Define problem to be solved
  • Set Early Literacy goals
	• Prep for collaborative Innovation Lab (March)
	• Get people ready (ongoing)
	  • Initiate self-awareness contemplative practices
	  • Begin shifting staff management to Leader-Leader model
	  • Break silos to make climate of participation and inclusion
	• Hold **Innovation Lab** to: create a vision of future; describe current state; generate ideas (April)
	• Develop action plan and make formal document * (May)
	• Get approvals and resource commitments (June)
		• Plan Early Literacy work implementation (July - October)
		  • Identify quick wins and assign them for implementation
		  • Assign dedicated team with project manager and budget
		  • Identify tasks and set up pilots
		• Experiment and Reflect (November – May)
		  • Hold regular learning check-in meetings to share work in progress, reflect, and plan next iteration
		  • Coach for performance
		  • Communicate progress and celebrate interim wins to boost energy and commitment
		• Transform into new standard * (June)
		  • Integrate Early Literacy learnings into mission and strategy
		  • Institutionalize policies and programs
		  • Hold a **celebration of learning** and sustaining leadership practices

Worked Out Example of *Simple* Change: Positive Hallways (4 Months)

Assess — Ready — Change

Explore Issue — Ideation Session — 18 — Share Victory
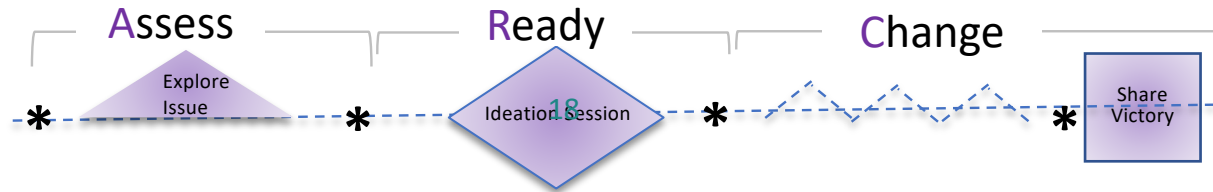
Assess (October)	Ready (November)	Change (December - January)

• Explore issue *
   • Gather initial thinking about an issue to be addressed
   • Include diverse representation
   • Consider root causes
   • Define problem to be solved
• Leadership self-assessment (ongoing)
   • Identify self-coaching activities
	• Prep for collaborative innovation session
	   • Break silos to ensure participation and inclusion
	• Hold **Ideation Session** to generate ideas for how to achieve new results *
	• Identify top ideas and suggest next steps
		• Identify quick wins and implement
		• Put small pilot in place and schedule and hold learning review(s)
		• Build on pilot to implement more widely
		   • Coach for performance
		   • Communicate progress
		• Institutionalize policies and programs *
		   • **Share victory** at an all-staff and/or town hall meeting
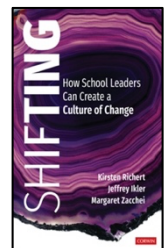
Change

- **Read:** Chapter 8

- **Reflect and Discuss:** Chapter 8

  - **The Big Shift:** How are the two leadership behaviors discussed in this chapter examples of "smart" and "healthy" behaviors?

  - **Application:** Think of a past change initiative with which you've been involved. How did it follow or not follow the principles discussed here? What happened as a result?

- **Activity:** Consider a typical school calendar. When could you plan to have regular reflection sessions? When can you check-in on on-going progress? What times make sense to plan frequent celebrations and acknowledgements?

Change

- **Read:** Chapter 9

- **Reflect and Discuss:** Chapter 9

  - **The Big Shift:** Do a gut-level audit of where your school or district operates relative to the three steps that underlie change success.

  - **Application:** The book stresses that change initiatives must be part of a coherent plan that addresses the "why" rather than approached as isolated events. Reflect on and discuss this key question: "How will this change, along with others we've made or are considering, serve our 'why'?"

- **Activity:** Listen to the "Leader Voices" segment via page 146. The essence of culture is where the group *becomes* the engine for delivering on the collective "why." Where is your school on a continuum from "doing" to "becoming"?

- Discuss what you are inspired to do next.

- Consider how to use your time to percolate discussion and plan action.

- Suggest any immediate follow-ups.

Invitation to Continue Exploring

Kirsten Richert

An innovation expert who works with leaders on transformational efforts...

LEARN MORE

Jeff Ikler

Director of Quetico Career and Leadership Coaching, a firm...
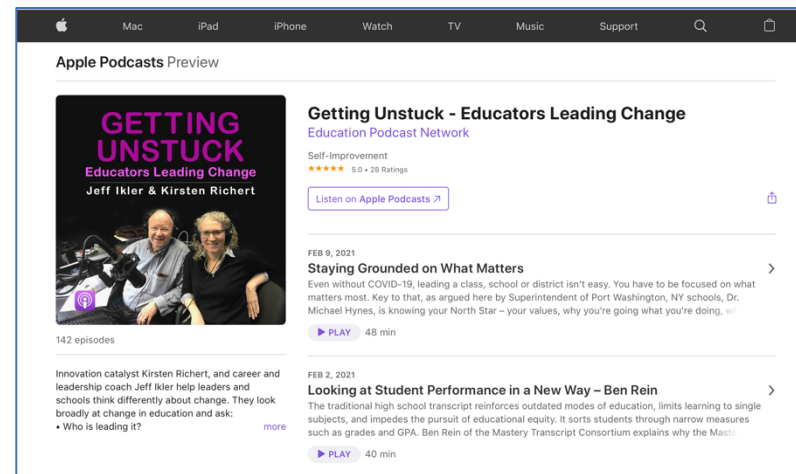
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Margaret Zacchei

Innovative educational leader and consultant with 25 years...

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