System Wise

System Wise

Continuous Instructional Improvement at Scale

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INTRODUCTION

JASMINE, THE ASSISTANT SUPERINTENDENT for the last twelve months at Greenwood School System, reviews her notes for the leadership team strategy retreat scheduled for the following week. Just back from vacation, Jasmine thought she would be energized and ready to rock and roll. But that's not how she's feeling. Yes, she has a vision of what she desires for the system. But if she is honest with herself, she's overwhelmed by the prospect of bringing that vision to life. How is she going to turn this massive ship?

In her previous role in another system, Jasmine experienced success both in leading schools and in engaging with system teams that supported schools through collaborative inquiry processes. While global and national events greatly impacted the normalcy of work during her first year on the job at Greenwood, she knows that the time is right to embark on a systemic change strategy that will require team learning for adults in service of creating more optimal learning environments for students.

Jasmine thinks about what she knows about her new school system and experiences déjà vu. The challenges are so reminiscent of those she faced in her previous job. First, she often hears strong levels of defensiveness when teammates respond to questions about work happening within their divisions. She feels that the culture of the system allows individuals to assign fault to others without implicating themselves—and their actions—in problems. Second, the students, families, and staff members come from a diverse array of religious, ethnic, socioeconomic, language, and racial backgrounds; yet dialogue about the implications of this diversity is nonexistent. Finally, she senses that although the leadership team may appear to work well together because they have few arguments and focus on getting things done, their skill at avoiding conflict means that they are avoiding important conversations about their strongly held opinions.

Jasmine is nevertheless hopeful because she knows that each of her colleagues really cares about students and brings deep skills, knowledge, and commitment to their work. She knows—based on hard experience—that the team will become more skilled at meeting the needs of students only if she and the superintendent create conditions for the group to raise conflict, agree on a shared set of coherent actions, and expand the influence of educators as they engage in improvement work.

As Jasmine looks up from her notes, she sees a map of school locations and reflects on how different each school's local context is. How will she and her leadership team ensure results for each student? Families are counting on them. How will they protect the well-being of their staff? Teachers are counting on them. How will they open doors of opportunity and prepare students for jobs that haven't been created yet? The community is counting on them. How will she address the systems that are no longer producing the desired results? Leaders are counting on them. Even as she asks these questions, though, she realizes that a deeper question needs answering: what is *her* role in bringing about change?

In our work supporting educators around the world in collaborative data inquiry, Jasmine's story is quite typical. Our team at the Data Wise Project has encountered many system-level teams composed of smart and kind educators who feel a deep commitment to doing their part so that each student in their care thrives.[1] Some teams effectively align around clear goals and work together for a measured impact. But it seems many more struggle to achieve and sustain their goals. What makes the difference?

We define system-level leaders as "System Wise" when they apply habits of mind and tools of improvement cycles to bring coherence and symmetry to learning across their community of learners. (See figure I.1.) *Coherence* is more than mission alignment; it requires skilled integration of elements, relations, and values.[2] *Symmetry* describes what it looks like when practices in one part of an organization are reflected elsewhere.[3] Nature is filled with examples of these qualities existing together. For example, take the silver fern, a favorite of the Data Wise community since its budding fronds have the same shape as our improvement process. The various parts of this

Figure I.1

System Wise Definition

sys·tem wise

adjective

Leaders are "System Wise" when they apply habits of mind and tools of improvement cycles to bring coherence and symmetry to learning across their community of learners.
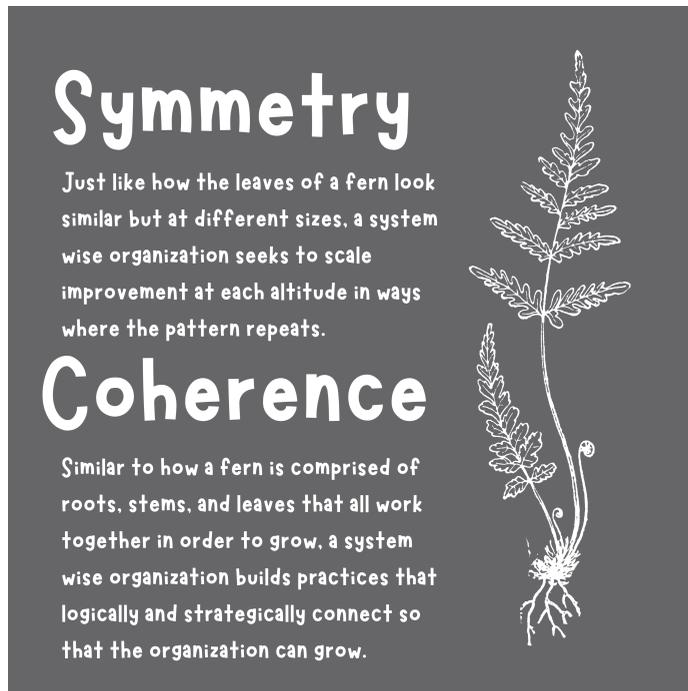
fern are coherent: its roots and stems and leaves all make sense together, working in concert to absorb water, sunlight, and nutrients in service of growth. It also offers a beautiful example of symmetry. As the stems unfold, they reveal a fractal pattern: the shape of an individual stem is repeated in the shape of the leaves that branch off that stem. (See figure I.2.)

Jasmine knows that achieving coherence and symmetry will require her system team to work together differently. Most importantly, she realizes that she is going to have to think critically about how she herself shows up every day. She does not want to be one of those leaders who is so busy performing job duties that they fail to deeply understand how those duties serve children.

There is no such thing as a lone System Wise leader. Instead, they are part of System Wise teams, which have several distinguishing characteristics. First, they recognize that they have a critical role in being the change as they manage

Figure I.2

Symmetry and Coherence

Symmetry

Just like how the leaves of a fern look similar but at different sizes, a system wise organization seeks to scale improvement at each altitude in ways where the pattern repeats.

Coherence

Similar to how a fern is comprised of roots, stems, and leaves that all work together in order to grow, a system wise organization builds practices that logically and strategically connect so that the organization can grow.

organization-wide improvement processes. This means that they are willing to adapt how their own teams function even as they seek to influence change in others. Leaders need to do more than model appropriate behaviors: they need to champion the voices and perspectives of those most proximate to the problems. The people who know best what students need are not across the hall from Jasmine's office. They are spread across the map of schools that is hanging on her wall.

Second, System Wise teams support transformation by embracing virtuous cycles of improvement.[4] They are best able to adopt this practice when individual leaders commit and hold one another accountable. Through each cycle, teams build clarity of vision, deepen understanding of their individual and collective identity, increase their capacity to execute strategies, creatively develop methods to assess learning, and create intentional, productive spaces for reflection.

Finally, System Wise teams create conditions where *all people* affected by the organization can participate in transformational practices. With a fern, you see the same pattern whether you are looking through a microscope at a single leaf or through binoculars at a full-grown plant. System Wise teams ensure that whether you are attending a senior leadership team meeting or a brainstorming session for families and other community members, you see familiar patterns too in how people collaborate around evidence to take action for kids.

Does this vision of coherence and symmetry resonate with you? We wrote this book because in working with system-level leaders worldwide, we have gotten to know many leaders like Jasmine who are eager to serve students better. Leaders who hope that as their leadership team grows in its capacity for learning and delivering desired outcomes, the rest of the organization will grow, reproducing wise practices across the many levels or altitudes of the system: divisions, schools, and classrooms. Perhaps, like you, these leaders are inspired by the System Wise vision but are hungry for guidance about how to make the vision a reality. They are looking for insight into the difficult questions: Why? How? What? With this in mind, the next part of this introduction addresses each of these questions in turn.

WHY? SO EACH STUDENT THRIVES

This vision for System Wise leadership can seem simultaneously inspiring and daunting. Surely it is a departure from how most systems currently operate, which can look like lots of people working in silos on more priorities than they can possibly manage. But what could justify taking on the challenge of ushering in a new way of doing business? We have seen that the key lies in system leaders' grounding in a clear

statement of *why* they do the work they do. Although the systems we have worked with vary in the exact language they use to describe their purpose, their shared *why* statements always seem to point to meeting the needs of each student. They are also able to

Figure I.3

Equitable Schools

e•qui•ta•ble schools

- Each learner is respected and celebrated for who they are
- Each learner has access to rigorous learning opportunities
- Learner outcomes—whether they be academic, social emotional, or connected to college, career, or community readiness—are not predictable by demographic data

articulate their vision for an equitable school. For many System Wise leaders, their description shares elements of what we at the Data Wise Project use to describe our vision. (See figure I.3.)
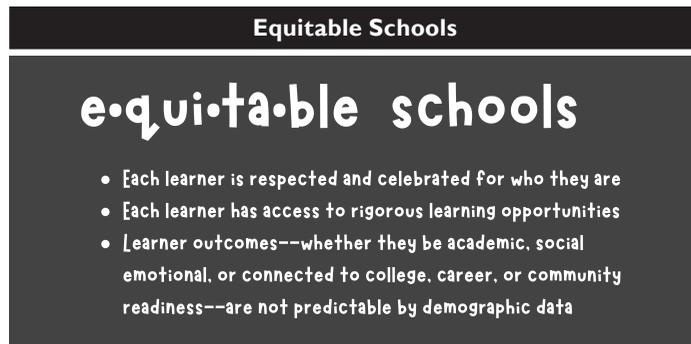
HOW? ACE HABITS OF MIND

Clarity on *why* system leaders do their work is essential, but understanding *how* they operate makes it possible to describe the specific behaviors that we see when leaders embrace being the change they hope to see replicated symmetrically across the organization. After several years of studying schools that were engaged in collaborative data inquiry, our team at the Data Wise Project found that there were three habits of mind that distinguished the schools that were able to support real improvements to student learning and those that were not. We call these the ACE Habits of Mind, which include a shared commitment to *action*, *assessment*, and *adjustment*; intentional *collaboration*; and a relentless focus on *evidence*. We have been inspired to see how System Wise teams use their shared values as a North Star and allow the ACE Habits of Mind to guide the organization in everything they do. As figure I.4 shows, each habit fosters equity, offering a compelling alternative to default habits that do just the opposite.

USING THE ACE HABITS OF MIND TO FOSTER EQUITY

A: Shared Commitment to Action, Assessment, and Adjustment

Instead of jumping to action and pressuring educators to get it right the first time, a shared commitment to action, assessment, and adjustment provides System Wise

Figure I.4

How the ACE Habits of Mind Foster Equity

HOW THE ACE HABITS OF MIND FOSTER EQUITY

ACE Habit of Mind	An approach that fosters equity looks like...	An approach that fosters inequity looks like...
A (recycle symbol)	Having a shared commitment to try things out and learn from "mistakes"	Jumping to action and pressuring educators to "get it right" the first time
C (hands holding symbol)	Building relationships, sharing leadership, and creating empathy across diverse aspects of identity	Emphasizing hierarchy and individualism
E (magnifying glass symbol)	Defining data broadly and using observation and stories to illustrate the diversity of experiences that learners have	Believing that "data are only numbers" and using averages to judge and compare

teams with a liberating accountability structure. By practicing this habit of mind, teams enable authentic experiential learning: learning by doing. Teams commonly develop strategic plans and other formal documents that establish multiyear goals with student-focused outcomes. They often cocreate these plans with a group of representative stakeholders. The expectation is that the clarity of the goals and focus on student achievement and well-being will be enough to motivate all members of the organization to do their part. We have seen these good intentions get derailed by changes in personnel, budget, or policy. Systems that adopt a shared commitment to action, assessment, and adjustment are better positioned to stay focused on goals even when a crisis hits. For example, teams with a deep commitment to this habit were better positioned during the global COVID-19 pandemic, when their consistent feedback loops allowed them to monitor progress toward maintaining rigorous academics in an emotionally and physically safe environment.

This habit can prevent acting in knowledge-poor silos and acting with prejudice. System Wise teams use evidence to empower those in the organization with the most

relevant knowledge to make decisions. Through this habit of mind, System Wise teams are able to tackle adaptive challenges: those that require people to transform their thinking, being, and believing.[5] System Wise team members commit to individual and collective growth as they embrace learning about the complexity of their context.

C: Intentional Collaboration

Instead of relying on hierarchies and individual efforts, a shared commitment to intentional collaboration entails making deliberate decisions about whom to bring to the table for a conversation. And perhaps most importantly, the conversation is then structured so that the collective wisdom of the assembled group is brought to bear. Many organizations have committed to diversity, equity, inclusion, and belonging efforts to better leverage the strengths that different people bring. These initiatives have included robust employee searches, training on historical context, and community-building exercises. While these serve an important role in developing people and how they work together, cultivating the habit of intentional collaboration means creating conditions that can sustain an authentic culture where *all voices, and especially those at the margins, matter every day*.

Espousing a value for teamwork in an organization is common, but it doesn't always translate to effective teamwork in practice. This habit of mind supports teams in actually enacting values such as inclusion, creativity, and vulnerability. For example, when an organization values inclusion, it moves away from doing work *for* others and toward doing work *with* others. This shift requires teams to be creative in their processes for honoring multiple perspectives to understand the problems, to develop solutions that invite others to share their wisdom, and to experiment in collaborative structures while learning from mistakes with humility. System Wise teams create symmetrical structures that enable intentional collaboration at and between every level of the system in service of coherence.[6]

E: A Relentless Focus on Evidence

Instead of believing that numerical data are all that matters, maintaining a relentless focus on evidence is about defining data broadly and seeing value in observation and stories. In this book, we use "data" and "evidence" interchangeably because both words have been part of the common discourse for many years. But if we had to do it over again, we might have named our first book *Evidence Wise*, as a way to help readers call to mind the broader definition instead of getting caught up in a restrictive definition: one that leaves many teachers feeling like data are something that can get in the way of understanding what their students need.

While "maintaining a relentless focus on evidence" might seem like a straightforward thing, it can create tension for an experienced leader. Often those with longevity in the field expect and are expected to contribute their wisdom and apply their understanding in leadership roles. A relentless focus on evidence requires leaders to draw on experience and yet be open to new information. We have seen how System Wise leaders develop self-awareness both to understand how their story creates a unique entry point to the work and to learn how to set aside their opinions and biases to focus on evidence. We have appreciated how System Wise teams use this habit of mind to manage complexity: they recognize that individuals are always swimming in a vast sea of data that they interpret through personal experience, and they appreciate that the collective group is needed to see the whole of what these data describe. By exploring multiple forms of evidence, it becomes possible to tell new stories and understand deeply entrenched problems in a new light.

A strong sense of urgency can drive leaders to go with their gut and use previous experiences to make decisions. That same urgency can tempt them to take the easiest route, which may be to use average assessment scores to judge and compare instead of looking more closely at individual student needs. System Wise leaders demonstrate humility by asking questions and resisting the pressure to always have the right answer. Humbly asking questions requires teams to slow the process to gather and analyze evidence, rather than reducing discomfort and jumping to action without due diligence. System Wise teams depend on protocols and other structures to enable consistency in practice until evidence-based inquiry becomes part of the culture or "how we do things."

System Wise leaders use the ACE Habits of Mind as daily touchstones and trusted guardrails when things get hard. When outside events or internal dynamics make leaders feel stuck and frustrated, System Wise teams go back to the ACE Habits of Mind to find their path forward. The repetition of this practice can generate a "causal loop" that strengthens a team's resolve to lean on the ACE Habits the next time things get tough.[7]

WHAT? THE DATA WISE IMPROVEMENT PROCESS

With a clear statement of *why* system leaders do the work they do and the ACE Habits to guide *how* they approach their work, system leaders are well positioned to be effective in *what* they do. In this book, we focus on the aspect of system-level leaders' work that involves continuous improvement of practice, and the framework we use is the Data Wise improvement process. This process was originally designed by educators

from Boston Public Schools and researchers from the Harvard Graduate School of Education to capture what equity-minded educators in schools were doing to work collaboratively to improve classroom instruction and student achievement. But leaders using Data Wise across school systems identified the need for a universal Data Wise improvement process that could be used with educators at any level of the organization. A revised version of the universal process is now the process that the Data Wise Project recommends for schools as well.[8]

The goal of this process is to improve what happens in the *learning core*: the critical relationships among learners, facilitators, and content.[9] You may be familiar with how the term "instructional core" has been used to describe relationships in the classroom; in this book we use Elizabeth City and Adonius Lewis's adaptation, since "learning core" more flexibly shows that it is not just students who learn and it is not just teachers who facilitate.[10]

INQUIRE

PREPARE

ACT

5 Examine own practice

4 Dig into evidence of learning

6 Develop action plan

3 Use stories to ignite curiosity

7 Plan to assess impact

2 Build data literacy

Act and assess

1 Organize for collaborative work

8

When educators use the Data Wise improvement process, they need to consider who is the "learner" that their team will be supporting in improving outcomes. Table I.1 shows how different teams support different learners and can choose different focus areas, or aspects of the system that the team would like to improve.

In this book, we describe how System Wise leaders answer questions about why, what, and how as they relate to each step of the Data Wise improvement process. Each chapter begins with an essential question and a case study to ground you in the experiences and challenges of real leaders enacting what real conversations at this step can sound like. We then describe the strategic tasks involved at this step, providing guidance where necessary about how tasks might differ if you are using the process to improve the ability of your system-level team to support the adult learners you directly serve or whether you are using it to structure your effort to scale Data Wise across your system. Each chapter concludes with examples of the System Wise approach and a return to the case study.
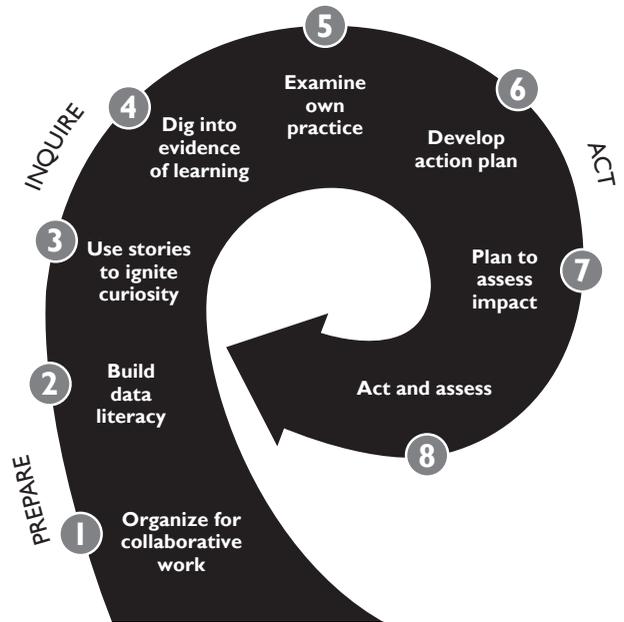
Table I.1

Different Teams Serve Different Learners		
WHO ON THE TEAM IS ENGAGING IN THE IMPROVEMENT PROCESS?	**WHO MIGHT BE THIS TEAM'S "LEARNERS"?**	**WHAT IS AN EXAMPLE OF A FOCUS AREA FOR THIS TEAM'S DATA WISE CYCLE?**
Teachers, instructional coaches	Students	Literacy
School, instructional leadership team	Teachers	Supporting students in asking generative questions
School leader supervisors, content directors	School leaders, teachers	Providing effective feedback on teacher practice
Senior system-level leaders	System division leaders, school leader supervisors, school leaders, networks of schools, teachers	Developing staff capacity to work together to solve problems
Guiding team	System division leaders, school leader supervisors, school leaders, networks of schools, teachers	Scaling Data Wise across a system

Although we organized our chapters to follow each step in sequence, we know from experience that powerful improvement work can happen without taking a linear path. Continuous improvement cycles at the system level are, by nature, complex and guaranteed to be messy. The steps provide a convenient organizing structure for the book, but you will know best the most effective entry point and pathway for your organization.

Chapter 1 kicks off the prepare phase and explains how System Wise teams *organize for collaborative work* by sharing stories about evidence sources they value as a strategy for uniting teams and coming to a shared purpose grounded in equity. This approach to value-setting centers the humanity of both educators and the students they serve and leads them to consider many sources of evidence, instead of defaulting to overreliance on standardized data sources. Chapter 2 describes how teams then *build data literacy* and assess system capacity to improve instruction at scale. This includes using system readiness criteria to identify a promising point of entry and aligning efforts to a framework that will bring coherence across the system.

The inquire phase begins with chapter 3, where System Wise leaders *use stories to ignite curiosity* and set a vision for wild instructional success. Wild success describes those hopes and dreams we have for our learners and ourselves that we

wish for desperately but are afraid to claim in fear that speaking them will make us sound foolish and unrealistic in our ambitions. It is important to ground this vision in the sensual: what will success look like, sound like, and feel like? Chapter 4 describes how teams then *dig into evidence of learning* and develop a symmetric learning-centered problem that captures what needs to happen at all levels of the organization to influence the critical relationships in the learning core. Then in chapter 5, teams *examine their own practice*, turning the mirror on themselves and conducting a candid assessment of how their actions are supporting or hindering the system's vision of wild success.

The act phase opens with chapter 6, where System Wise teams *develop an action plan* that builds coherence across the system. The idea here is to design a strategy that is symmetric from system to school to classroom and directly implicates each leader in influencing what happens in the learning core. In chapter 7, leaders *plan to assess impact,* with a particular emphasis on using program implementation data to sustain the work. Effective program implementation requires gathering information on participants' reactions and learning, organizational support and change, participants' use of new knowledge and skills, and student learning outcomes, with an emphasis on collecting this information in ways that allow for fine-tuned adjustments in implementation.[11] In chapter 8, teams *act and assess*. They use evidence to improve the practice of individuals, their team, the structures and systems of the organization, and the efficacy of school teams. They also use evidence to communicate learning across the organization as well as with students, families, and community members.

In the final chapter, we offer our own story of how our team at the Data Wise Project worked to increase our capacity to serve educators in building equitable schools worldwide. We hope that by sharing candidly our own experience, we can offer some inspiration to tackle the daunting but rewarding work of scaling wisely.

TAKING A SYSTEM WISE APPROACH

There are many unique demands of system-level work, and these require what we call a *System Wise approach.* As System Wise leaders apply habits of mind and tools of improvement cycles to bring coherence and symmetry to learning, they attend to dimensions of scale, expect the unexpected, manage the change process, and practice radical inclusivity. Next, we provide an overview of each of these four practices; in each chapter, we share real stories from a wide variety of contexts that show how twenty-eight System Wise leaders have brought them to life.

Attend to Dimensions of Scale
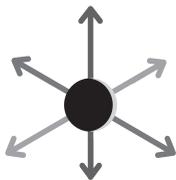
As she prepares for the beginning-of-year retreat, Jasmine is thinking about system teams, school leaders, and classroom teachers focusing and improving their work. Her desire for symmetry across all levels of the organization is fundamentally a challenge of scale.

Too often, scaling is operationalized in practice as simply doing more of something in new places or with new people. Whether the measure is schools served, teachers trained, or revenue earned, the goal is *more*, so success is measured by quantity. This definition of scale leads to several challenges for leaders. First, it often privileges those ideas and actions that are easiest to replicate. These can include aspects of a change effort that are most technical or performative because the focus is on seeing actions occur and not on the impact of those actions. Second, it often prioritizes ideas and actions that can be done *to* other people instead of *with* them. Speed is overvalued and initiatives mandated with little attention to local context and building shared ownership. Finally, focusing on more helps to create the initiative churn that is all too common in our public institutions. When ideas or actions are implemented in new places or with new people without understanding why they worked in one place or which aspects of the change are most important, the initiatives often fail. This leads to abandoning ideas or actions that might have worked if people came together to adjust the ideas to better fit their context.

System Wise leaders work to avoid these pitfalls by understanding the multiple dimensions of scale and being intentional about how and when to focus on each dimension (see figure I.5). Cynthia Coburn and Chris Dede provide a helpful framework that distinguishes between five dimensions of scale: depth, sustainability, spread, shift, and evolution.[12] There are trade-offs and tensions between these dimensions: attending to one may make it harder to achieve the others. But if an improvement is going to take root across an entire system, eventually all will be important.

Let's take an example: suppose you are seeking to scale the Data Wise improvement process at every level of your organization. How might you attend to each dimension?

DEPTH. Depth concerns the nature and quality of implementation. It involves not just changing structures and procedures but changing beliefs and ways of working together. You may find that changes to adult culture and student learning happen in the first year that teams begin integrating the process, habits, and norms into their practice. But we have to be honest here: teams regularly report needing to use the process for two to three years before they see transformational improvements

to teaching and learning. Why? It takes some time for educators to experience the difference between *doing* Data Wise and *being* Data Wise. Scaling for depth can feel like digging a well. When you first start digging, you may not see results right away. But if you have planned carefully and aligned with your colleagues' core values, the commitment to going deeper allows you to tap into a generative spring. If you prioritize depth, you may decide to provide intensive support to a smaller number of teams at the outset, with the idea that these teams can be living proof that *yes, collaborative data inquiry can work here*.

SUSTAINABILITY. Sustainability refers to the ability for a change to persist over time despite all the pressures toward entropy in organizations. Scaling for sustainability is like working with the ecosystem that surrounds a pond or lake, which allows water levels to replenish themselves even as seasons change. It involves attending to threats of change in team personnel, leadership, strategic priorities, and resources in order to protect and cultivate what is most critical to the change effort. When scaling Data Wise across your system, you will find that building the capacity of multiple people to lead the work and protecting collaborative time can help ensure that the work can go on even as circumstances change.

SPREAD. Spread is about sharing the process widely with new people; it is the dimension of scale that most people think of first. It is a river that takes the practice from place to place. But as a leader who is working to

Figure I.5

Types of Scale

Ways to Scale Data Wise

Deepen

Sustain

Spread

Shift

Evolve

Graphic inspired by the work of Cynthia Coburn and Chris Dede

spread Data Wise practices across your system, you can't just sprinkle seeds and hope for the best. You need to cultivate the soil so that new teams are receptive to change and adjust system-level policies to be coherent with this new approach to working. Depth and sustainability might seem like the most important dimensions to prioritize, but if you wait too long to attend to spread, you may find that those who were not initially included feel left out, or that you have undermined your commitment to
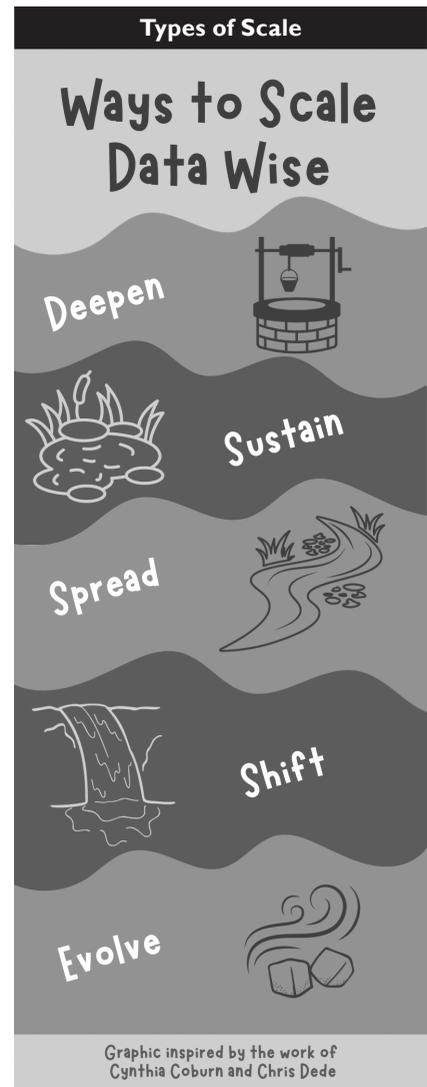
systemwide coherence. For this reason, many leaders begin by engaging everyone in the first couple of Data Wise steps right away, with the understanding that all teams may not progress at the same pace.

SHIFT. Shift in ownership is what happens when teams embrace a change to such a degree that they are doing it because they want to and wouldn't have it any other way. Imagine the power of a waterfall as gravity starts to do the work. You know shift is happening when you hear colleagues using Data Wise language to explain what they are doing and what they need. You *really* know that shift is happening when there is a leadership change and people won't give up their habits of mind and ways of working because *this is how we do things now*.

EVOLUTION. Evolution typically follows shift and is about adapting an approach to respond to new conditions or to solve different problems. Like water goes from liquid to solid or gas depending on conditions, initiatives need to be able to change in new environments. This very book came about because of evolution: system leaders modified and adopted what started as a process for teacher teams in order to solve instructional coherence challenges across their organizations. As you work to scale the Data Wise improvement process across your system, you will discover that the very people who relied on you to learn the process are now your best teachers about where the system needs to go.

Expect the Unexpected

What can make improvement so difficult is that you do not know with certainty the impact of your actions. Jasmine does not know what will happen if she and her team commit to shifting toward a culture focused on coherence and symmetry. Nor do they know what outside forces they will encounter once they get started. But that's just how the world works. A helpful definition of a system might be that it is *the level of organizational complexity where crisis is a predictable and cyclical feature of the context and where crisis is oftentimes the main driver of change*. In this definition, system leadership is the set of skills required to make positive change within the context of cyclical crises.

When working at scale, we need to expect the unexpected. We are wise to remember Phileas Fogg's confidence, when preparing for his round-the-world journey in Jules Verne's *Around the World in 80 Days*, that "the unforeseen does not exist."[13] We, the *System Wise* authors, *know* that at the very moment you are reading this book, there is a major climate event happening somewhere on this planet. We also know

that sometime in the not-too-distant future, your organization will face a threat that will take some (or all) of your focus off instructional improvement. And just as we *don't know* whether the climate event is a fire, an earthquake, a tornado, or something else, we don't know if the next crisis your organization will face will be a leadership scandal, a financial meltdown, a violent act, a global pandemic, or something else. Because the specific details of each crisis are novel and unanticipated, too many systems grow tunnel vision and bounce from crisis to crisis in a never-ending game of organizational whack-a-mole. This creates deep initiative fatigue and the mindset that improvement cannot happen at the system level.

While the maxim *If you can predict it, you can prevent it* might not describe these events, System Wise leaders do subscribe to their own version—*If you can predict it, you can plan for it and respond to it in order to ensure that learning continues as a priority*. There is power in normalizing crisis, as long as we do not minimize it or allow it to reduce our sense of efficacy. System Wise leaders define the continuum of unexpected occurrences and design systems and structures to sustain learning improvement efforts that are resilient to the pressures on the system.

Table I.2 summarizes several events of varying severity that system leaders can envision confronting during their tenure. One of the purposes of slower, more intentional improvement processes is to insulate the core work from the paralysis that tags along with crisis. While we wouldn't argue that there is value in preparing for learning after extremely unlikely but possible species-ending events, we think

Table I.2

A Continuum of Unexpected Events			
LIKELY TO HAPPEN EVERY 1–5 YEARS	**LIKELY TO HAPPEN WITHIN A GENERATION**	**LIKELY TO HAPPEN WITHIN A LIFETIME**	**EXTREMELY UNLIKELY BUT POSSIBLE**
A leadership change	Civil unrest	An organizational takeover	A giant asteroid hits Earth
Recession	Financial crisis	War/multinational violence	Nuclear war
New political priorities	Technology innovation or disruption	Global pandemic	
Organizational restructuring	Significant legal decision delivered by a high court		
Curriculum change			

there is much that leaders can do to support learning through the other types of crises, and many of which became more salient during the COVID-19 pandemic.

System Wise leaders anticipate that a *crisis will put new demands on time and people*. A crisis likely means that fewer people are available and that the people who are available will not always be fully present. System Wise leaders build slack into their plans and adjust timelines as appropriate. Most importantly, they realize that the one part of the learning equation that will always be present is the *learner*. Therefore, they design their work in ways that emphasize the agency and autonomy of learners. They know that the person doing the work is the person doing the learning.
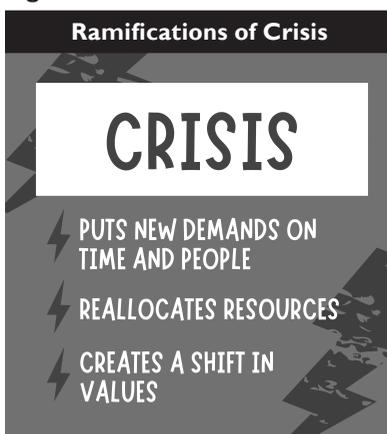
System Wise leaders anticipate that a *crisis will reallocate resources*. All the crises listed in figure I.6 would reduce the resources available for learning or how they can be used. System Wise leaders appreciate that having *fewer* resources does not mean having *no* resources, and that not knowing how you will achieve your goals should not prevent you from taking the steps available to you today. We have seen that places with no contractually available time for collaboration and no additional money to incentivize improvement work will find ways to collaborate. During the pandemic, this ability to adjust resource allocation was most evident in the places where there were creative shifts to virtual and asynchronous instruction. In conflict zones, we have worked with educators who collaborated and taught through WhatsApp when all other infrastructure was destroyed.

System Wise leaders anticipate that a *crisis will create a shift in values*. A crisis causes us to see the world differently. We might view things with a mindset of scarcity. We might see life as more precious and reevaluate what is important to us. We might try to prepare for imagined threats or live each day as our last. System Wise leaders know that crises are liminal moments where who we are as individuals and who we are collectively are no longer who we will be. Lots of people and organizations experienced the winnowing effects of a crisis during the pandemic as it became clearer what mattered most.

Attending to a crisis while continuing the core learning work of a system requires leaders to know what is most important to learning. System Wise leaders anchor their leadership to the ACE Habits of Mind and use these habits to weather inevitable storms. As they confront crises, they reimagine what collaboration looks like in the new context. They redefine what evidence should ground their efforts.

Figure I.6

Ramifications of Crisis

CRISIS

PUTS NEW DEMANDS ON TIME AND PEOPLE

REALLOCATES RESOURCES

CREATES A SHIFT IN VALUES

They assess, act, and adjust at a different level of intensity or speed. Ultimately, System Wise leaders view each crisis through the learning core. With learning simplified to the relationships between learners, facilitators, and content, they can build a path to improvement through the assets available, informed by the ACE Habits of Mind.
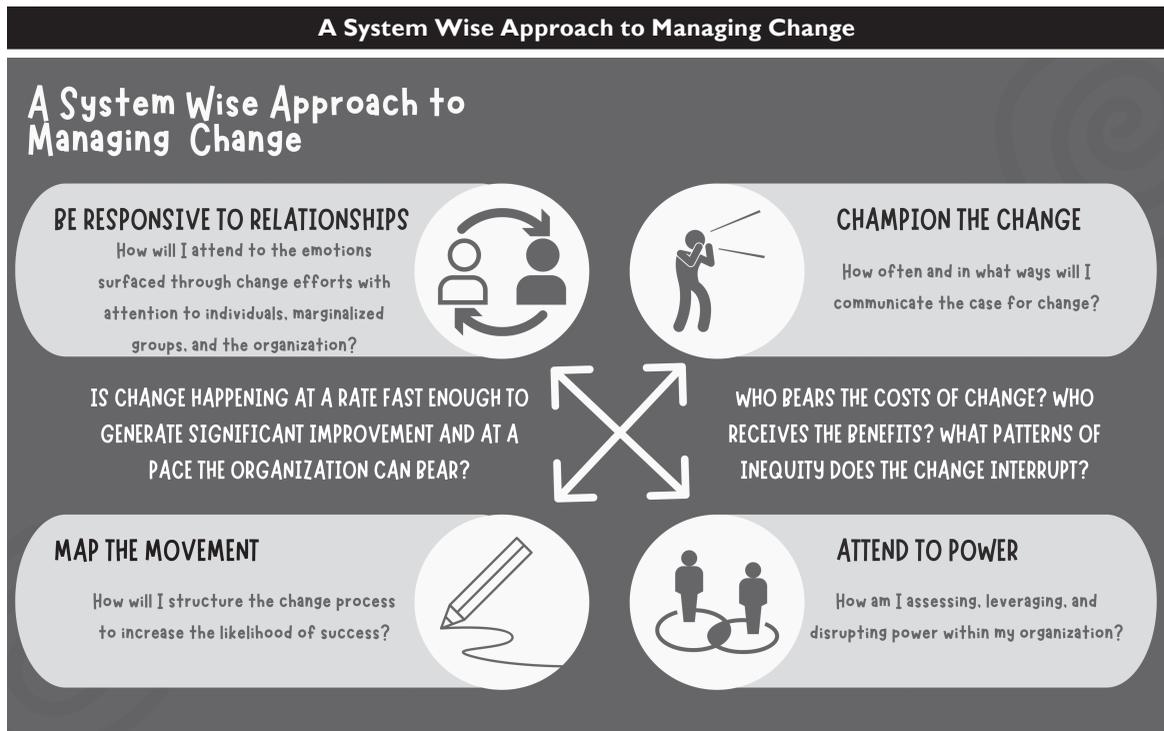
Manage the Change Process

Jasmine is stuck; she does not know where to begin. She desires change but is not clear on what needs to happen to manage the process or define her role within the change effort. System change literacy requires an understanding of what System Wise leaders must do regardless of the specific details of the particular change effort. This is the literacy of managing the change process in a way that advances equity.[14]

- System Wise leaders are *responsive to relationships*. These leaders recognize that change will bring differing feelings and reactions, so they create space to engage and attend to these impacts. They hold space for individual and collective processing and for developing connectedness among all members of the community.

- System Wise leaders *champion change*. Inclusive leaders inspire and call stakeholders to action through their communication about the change. This includes the frequency of communication, formats for communication, and the inclusion of diverse stakeholders in development and dissemination of the communication. As a result of this attention to communication, all members of the organization can embody the why, how, and what of the change.

- System Wise leaders *map the movement*. Inclusive leaders consistently check and refine change efforts based on the impact on key stakeholders to ensure change is leading to more equitable opportunities for students.

- System Wise leaders *attend to power*. Inclusive leaders attend to power dynamics and leverage "power *with*" instead of "power *over*" as they structure and implement change efforts.

These actions facilitate an equitable approach to change and help ensure that leaders do not misuse their roles to replicate the inequities currently baked into their organization or their leadership. (See figure I.7.)

Figure I.7

A System Wise Approach to Managing Change

A System Wise Approach to Managing Change

BE RESPONSIVE TO RELATIONSHIPS
How will I attend to the emotions surfaced through change efforts with attention to individuals, marginalized groups, and the organization?

CHAMPION THE CHANGE
How often and in what ways will I communicate the case for change?

IS CHANGE HAPPENING AT A RATE FAST ENOUGH TO GENERATE SIGNIFICANT IMPROVEMENT AND AT A PACE THE ORGANIZATION CAN BEAR?

WHO BEARS THE COSTS OF CHANGE? WHO RECEIVES THE BENEFITS? WHAT PATTERNS OF INEQUITY DOES THE CHANGE INTERRUPT?

MAP THE MOVEMENT
How will I structure the change process to increase the likelihood of success?

ATTEND TO POWER
How am I assessing, leveraging, and disrupting power within my organization?

Practice Radical Inclusivity

Jasmine feels the weight of having so many people counting on her and her team: students, families, teachers, leaders, and the broader community. She has a really important choice to make. She can shoulder this weight and use her best judgment to make decisions, or she can foster a culture that values collaboration and develop structures that support inclusive practices. She feels an immense amount of pressure to do what is best *for* the organization, but is there an opportunity to do what is best *with* the organization?

System leaders are uniquely positioned within their organizations to both build and dismantle structures in service of the vision and mission of the organization. System Wise teams are charged with recognizing oppressive structures that yield inequitable outcomes and working collaboratively to remove these barriers. This collaboration requires *radical inclusivity*, which ensures that voices across all levels

of the system are heard and that the perspectives of students and the community—especially the most marginalized members—are taken into account.
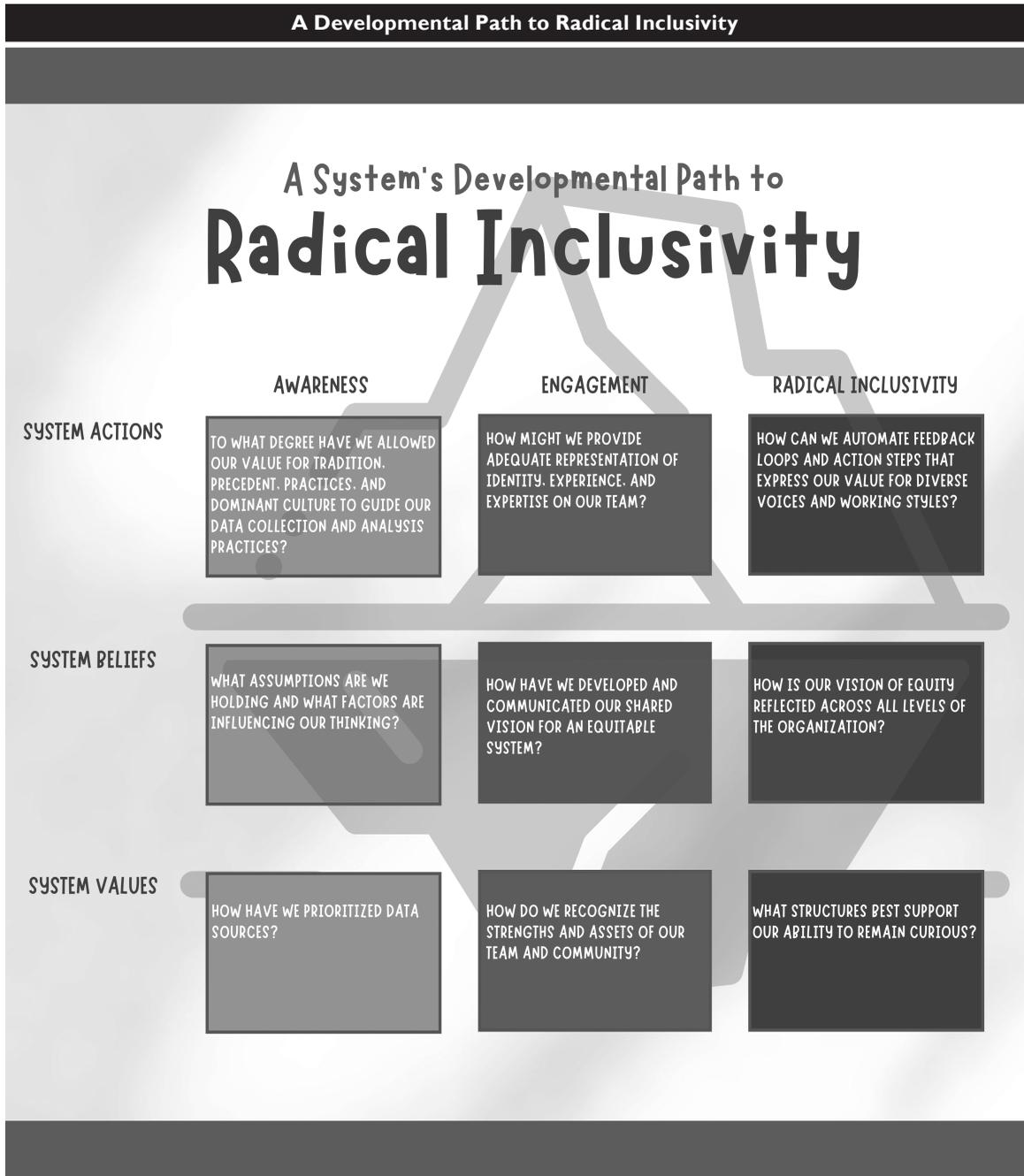
Data inquiry cycles provide system leaders with a common language and experience for seeing and understanding the systems they intend to impact.[15] The individual perspectives, assets, and wisdom of leaders are important, but system change management is a collective effort. When you commit to the ACE Habits of Mind and an equity lens, you are committing to transforming your culture. As stated earlier, the Data Wise Project describes an equitable school as one where each learner is respected and celebrated for who they are, each learner has access to rigorous learning opportunities, and learner outcomes—whether they be academic, social-emotional, or connected to college, career, and community readiness—are not predictable by demographic data. If this is the goal for an equitable *school*, then an equitable *system* is one that creates the conditions where educators have aligned beliefs, values, strategy, capacity, and resources to build and sustain equitable schools.

While system leaders need to develop a lens for equity and identify structures that perpetuate inequity, the "how" of this work requires teams to practice radical inclusivity. Traditionally, leadership teams have held the responsibility and privilege of identifying problems, solutions, and criteria for success. And historically, top leaders of organizations have disproportionately been white (in the United States) and male, demographics that do not typically represent the organization as a whole. Radical inclusivity involves significant and purposeful engagement with all community members to share leadership throughout the continuous improvement process. Radical inclusivity is the connective tissue that aligns the organization's values, beliefs, and actions to shift the culture in favor of equity.

Figure I.8 offers a series of questions to prompt System Wise teams as they reconstruct systems to create radically inclusive organizations. These questions are set against a backdrop of an iceberg to indicate that, although system actions are visible to all, the beliefs and values that lie beneath the surface are equally important to acknowledge and address.[16] The questions are grouped along a developmental continuum that starts with *awareness* of the need to include others and progresses to *engagement* of multiple voices before getting to *radical inclusivity* as a sustained approach. While it is a progression, most leaders will be addressing awareness, engagement, and radical inclusivity at the same time in different parts of the organization.

Returning to these prompts regularly supports system teams in practicing radical inclusivity. When your team commits to enacting your value for equity, you give permission, provide the structures, and develop an organizational culture that is conditioned to deliver equitable outcomes for students.

Figure I.8

A Developmental Path to Radical Inclusivity

A System's Developmental Path to
Radical Inclusivity

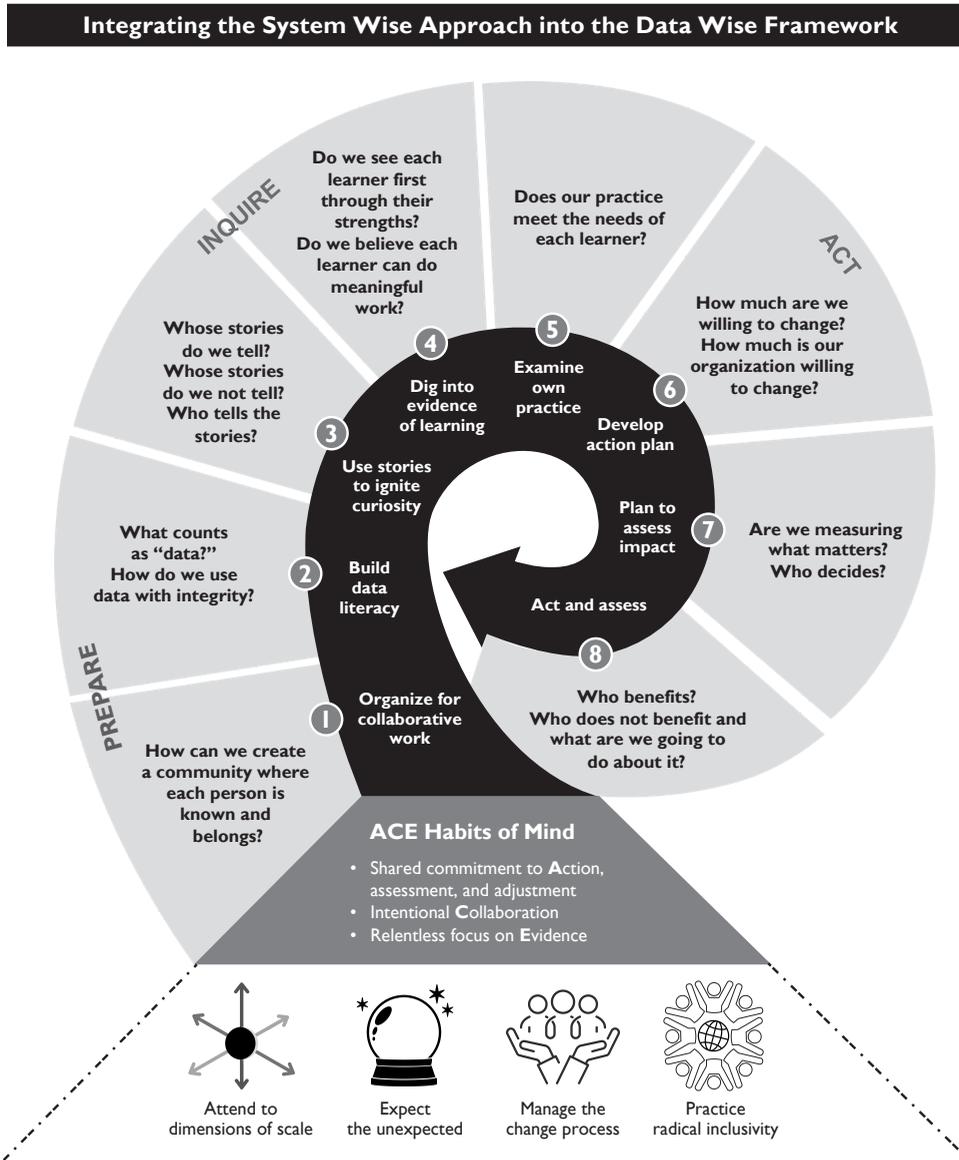|	AWARENESS	ENGAGEMENT	RADICAL INCLUSIVITY
SYSTEM ACTIONS	TO WHAT DEGREE HAVE WE ALLOWED OUR VALUE FOR TRADITION, PRECEDENT, PRACTICES, AND DOMINANT CULTURE TO GUIDE OUR DATA COLLECTION AND ANALYSIS PRACTICES?	HOW MIGHT WE PROVIDE ADEQUATE REPRESENTATION OF IDENTITY, EXPERIENCE, AND EXPERTISE ON OUR TEAM?	HOW CAN WE AUTOMATE FEEDBACK LOOPS AND ACTION STEPS THAT EXPRESS OUR VALUE FOR DIVERSE VOICES AND WORKING STYLES?
SYSTEM BELIEFS	WHAT ASSUMPTIONS ARE WE HOLDING AND WHAT FACTORS ARE INFLUENCING OUR THINKING?	HOW HAVE WE DEVELOPED AND COMMUNICATED OUR SHARED VISION FOR AN EQUITABLE SYSTEM?	HOW IS OUR VISION OF EQUITY REFLECTED ACROSS ALL LEVELS OF THE ORGANIZATION?
SYSTEM VALUES	HOW HAVE WE PRIORITIZED DATA SOURCES?	HOW DO WE RECOGNIZE THE STRENGTHS AND ASSETS OF OUR TEAM AND COMMUNITY?	WHAT STRUCTURES BEST SUPPORT OUR ABILITY TO REMAIN CURIOUS?

INTEGRATING THE SYSTEM WISE APPROACH INTO THE DATA WISE FRAMEWORK

Figure I.9 offers a visual representation of how System Wise leaders address the three questions that we explored at the beginning of this chapter. "Why?" is the most important question, so it is only fitting that the halo of equity questions surrounding

Figure I.9

Integrating the System Wise Approach into the Data Wise Framework

INQUIRE

Do we see each learner first through their strengths? Do we believe each learner can do meaningful work?

Does our practice meet the needs of each learner?

ACT

Whose stories do we tell? Whose stories do we not tell? Who tells the stories?

How much are we willing to change? How much is our organization willing to change?

What counts as "data?" How do we use data with integrity?

Are we measuring what matters? Who decides?

PREPARE

How can we create a community where each person is known and belongs?

Who benefits? Who does not benefit and what are we going to do about it?

4 Dig into evidence of learning

5 Examine own practice

3 Use stories to ignite curiosity

6 Develop action plan

2 Build data literacy

Plan to assess impact 7

Act and assess

1 Organize for collaborative work

8

ACE Habits of Mind
- Shared commitment to **A**ction, assessment, and adjustment
- Intentional **C**ollaboration
- Relentless focus on **E**vidence

Attend to dimensions of scale

Expect the unexpected

Manage the change process

Practice radical inclusivity

the work take up the most space. "How?" is foundational, which is why the ACE Habits of Mind are the sturdy base holding up the eight-step process, which answers the question "What?" Beneath the Data Wise framework are the four icons that symbolize what is involved in taking a System Wise approach to this work.

HOW TO USE THIS BOOK

Books by their very nature are linear, and authors need to decide on an order for the chapters. Systems by their very nature are complex, and the work of improving them is *anything but* linear. Books also elevate the perspective and judgment of the authors, yet in our experience, it is the perspective and judgment of the practitioners closest to the problem (you, our readers!) that matters most. The pages that follow represent our effort to resolve these tensions.

As described earlier in this introduction, we have used the eight steps of the Data Wise improvement process to structure this book. But that doesn't mean that you need to engage with these ideas in a linear way. You can be System Wise without engaging in formal inquiry cycles, and even if you do choose to do formal cycles, you will quickly realize that, in practice, improvement doesn't happen in a step-by-step way.

Each chapter has the following elements, and you may find it helpful to first read the elements that seem most compelling to you:

- A stylized *case study* that threads throughout the book, showing the challenges system teams can face at each step of the process

- An analysis of how the *ACE Habits of Mind* do or do not show up in the case, which includes an exploration of how leaders' actions are informed by their values, beliefs, and mindsets

- A detailed description of the *strategic tasks* associated with each step, with examples, checklists, and templates for implementation

- A discussion of what a *System Wise approach* looks like at each step, featuring multiple stories of real system leaders, examples of work products, and a return to the case study

- *Reflection questions* for discussion

We've also included a System Wise tools section in the appendix at the end of the book, which includes:

- *Two sample throughlines*, tracing how Jasmine's *leadership team* used the Data Wise improvement process to improve their support of learners they directly serve (school leaders) and another showing how the system's *guiding team* used the process to scale Data Wise across Greenwood School System

- *Big ideas of data literacy,* a high-level summary of concepts that support responsible data use

- *Templates* that you can use in your improvement work

- *Protocols* for structuring focused discussions that practice radical inclusivity

Reader, the choice is yours. Turn the page and explore how you might organize your team for collaborative work. Jump to the chapter that most closely resembles where you are stuck in your improvement journey. Skim the chapter specifics on the ACE Habits of Mind or taking a System Wise approach. This book is *our* vision of wild success for what System Wise leadership could look like, but you need to paint your own. Although the book is grounded in evidence and written collaboratively, we expect that you will act, assess, and adjust its ideas to take into account your context and collective wisdom. As you embark on this journey, we invite you to join our community of learners and share your story.

We give you permission to hack this book. However, we hope that by the time you are done reading it, you realize you never needed permission in the first place. If you hack it based on evidence gathered and analyzed with a team in order to assess and adjust your actions to serve kids better, then you have plenty to teach others (including us!) about being System Wise.

1

ORGANIZING FOR COLLABORATIVE WORK

How can we create a community where each person is known and belongs?

SEVEN MINUTES AFTER THE 8:00 A.M. start time of the meeting to plan the beginning-of-year retreat for the leadership team, a team member enters the room and silently mouths an apology. Jasmine, the assistant superintendent, clears her throat and announces, "Now that everyone is here, we should get started. As you know, literacy is a priority this year given how many students were not proficient on the state language arts assessment. We need teachers to work together to use data more consistently to meet the needs of all learners."

A few team members shift in their seats. "Of course, having data is important; I'm all for teachers using helpful data to make decisions," responds one person. "But this is a contract negotiation year, and I can't spend political capital on mandating common planning time when we likely will need to adjust salary schedules. Anyway, those assessments do not tell us anything useful about *why* some students are struggling. We need to deal with a leaner budget and consider more teacher autonomy before—"

"Are we already giving up on improving teaching?" interrupts another. "The mayor just announced their priority for investing in early childhood. We need a systemwide focus on universal preschool and family engagement."

The person next to Jasmine nods in agreement and whispers, "Our most vulnerable students—especially those from racially, culturally, and socially marginalized groups—are not served well. We need to focus on our state audit of special education services."

As the conversation goes on, Jasmine can feel the swirl of emotions in the room. Jasmine wonders how people who work together every day and care deeply about their work can see the organization and their priorities so differently. She came to this school system committed to sharing leadership and empowering her team to make decisions, but that doesn't seem to be working. Before she opens her mouth to respond, she wonders whether she just needs to lead in a more directive manner—at least for the next couple of years.

ACE HABITS OF MIND IN STEP 1

In Step 1, System Wise teams combine a shared purpose with the ACE Habits of Mind to ground their actions in shared values. Let's consider this case through these three habits (see figure 1.1).

A: Shared Commitment to Action, Assessment, and Adjustment

Jasmine is wavering, unsure what to do. The question, "Where do we begin?" is one many teams have. The work of continuous improvement sometimes feels too large and unwieldy. When she accepted the

Figure 1.1

ACE Habits of Mind

A C E Habits of Mind

A — shared commitment to Action, Assessment, and Adjustment

C — intentional Collaboration

E — relentless focus on Evidence

role of assistant superintendent, she envisioned that she would practice distributed leadership to address the many adaptive challenges facing the system. A sense of urgency combined with a fear of inadequacy can make it tempting to just do something. But adaptive challenges by their very nature require people to co-construct solutions to problems. Deep down, Jasmine knows that if she tries to force the system to do things her way, she will fail. Part of the commitment to *action* is knowing when it is not yet time to act.

Jasmine opens the meeting with *her* priorities. She states her priority of focusing on literacy and expresses her value of using data to inform instruction and her concern that the system lacks the capacity to use data well. Before she can make the case for what she thinks should happen, another member of the team questions the validity of the inferences that can be drawn from assessment data, and others advocate for alternative priorities. These leaders are clearly not on the same page,
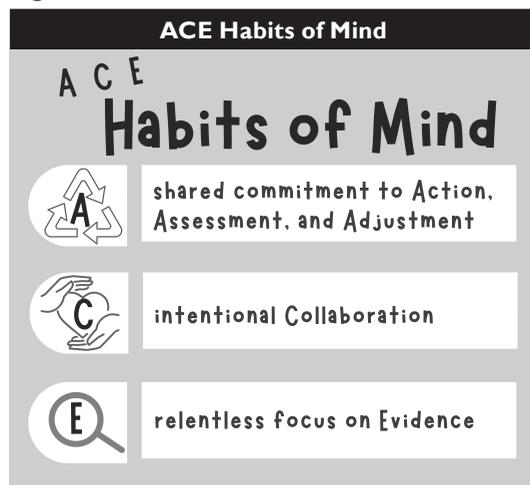
yet they are engaged and willing to bring their perspectives to the table. If Jasmine had made room to surface the many perspectives in the room, she would have had the opportunity to *assess* where her team is and to make *adjustments*.

C: Intentional Collaboration

System leaders have the opportunity to create intentional spaces where team members with differing opinions can authentically listen to one another and commit to working collaboratively. In the Greenwood case, there are several instances of actions that are not collaborative. A late entrant holds up the meeting start time for everyone, which could send a signal to colleagues that she thinks whatever she was doing was more important than respecting the time of her waiting colleagues. One team member interrupts another mid-sentence. Is everyone allowed to interrupt, or just the people with the most power or loudest voices? Jasmine is still relatively new to the Greenwood School System. She is continuing to learn the historical and relational context that informs team members' mental models and interpersonal dynamics. She is learning that there is a continuum of stakeholder perspectives from "we don't have a problem" to "we have a deep-seated systemic problem." Supporting the team in cultivating the habit of mind of *intentional collaboration* will require setting norms and using strategies that draw out the collective wisdom and purpose of the group.

The process of creating a shared purpose, which we call a shared *why* statement, allows the team members to see what they have in common. When this statement is developed by first having team members share about who they are, what they believe about equity, and how that impacts how they approach their work, team members begin to know that each person on the team will be heard, seen, and valued. This conversation shows that each member has unique assets and can inspire the team to leverage those assets so that together they can achieve more than they could as individuals.

But for a shared *why* to be useful, the team needs to commit to norms of collaboration, sometimes called community agreements, that clarify how they will treat one another as they work toward bringing their shared *why* to life. This is the next level of work for Jasmine and her team.

E: Relentless Focus on Evidence

Contemplating where to begin in a change effort is a significant effort on its own. There are so many priorities to consider, and each person's rationale for their stated priority may differ. This is when cultivating the habit of mind of maintaining a *relentless focus on evidence* is essential. Jasmine tries to direct the group's attention to performance on the state test, another team member points to data from a state audit

of services, and others draw on their observation of political realities. Each person is confident about the power of the data they know well, but the team members are not yet in the habit of providing specific and descriptive evidence to support their arguments. On the surface, they are using inferences made from these data sources to argue for opposing priorities. But if they had a shared *why* and the discipline to look closely at evidence together, they might see that they need multiple sources of evidence to serve their shared purpose.

Even before collecting evidence connected to their shared *why*, System Wise leaders need to think about what evidence they have that their team is ready to meaningfully engage in continuous improvement. It is important that teams create safe, brave spaces to authentically share not just who they are and what they *know* but also where they are on their professional journey and what they *don't know*. Sometimes the leader herself needs to model using evidence. After all, when Jasmine asserts that the system needs "teachers to use data more consistently to meet the needs of all learners," what evidence does she offer to show that she knows what teachers' data practices actually look like?
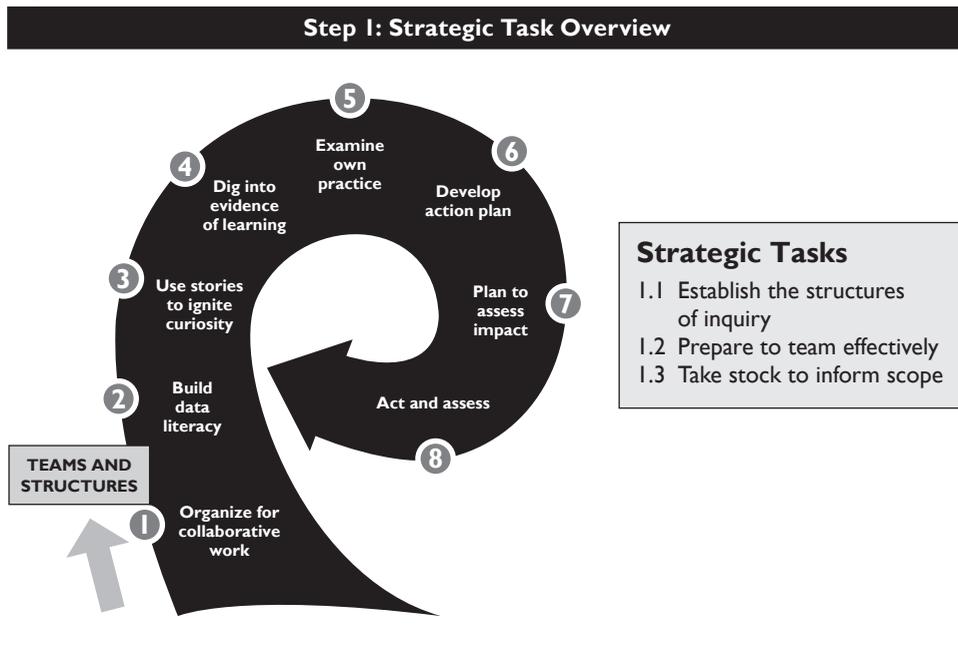
STRATEGIC TASKS FOR STEP 1

So how do you get started using a continuous improvement approach? The goal of Step 1 is to launch a collaborative and aligned team that is well prepared to engage in improvement work. (See figure 1.2.) The Data Wise "swoosh" is especially wide at this part of the process because it has to be: the remaining steps of the process need a broad base of support on which to rest. Your team's ability to collaborate effectively depends on intentional design of both the team itself and the structures it will use.

The strategic tasks for Step 1 include establishing the structures of inquiry, preparing to team effectively, and taking stock to inform scope. As you read this book, begin thinking about why you are learning about the Data Wise improvement process. Is it because your system leadership team plans to use this process to improve your ability to build the capacity of the adults you directly serve? Or are you planning to scale the Data Wise improvement process to schools across your system? Perhaps your intuition (or your Data Wise coach) is telling you that you will eventually be using it for both purposes? If so, your intuition or coach is onto something. But on your first time through this book, you may find it helpful to keep one or the other purpose in mind.

Next, we describe the strategic tasks for Step 1, clarifying the situations where this task looks different depending on whether you are using Data Wise to improve your own practice or if you are scaling Data Wise.

Figure 1.2

Step 1: Strategic Task Overview

5 Examine own practice

4 Dig into evidence of learning

6 Develop action plan

3 Use stories to ignite curiosity

Plan to assess impact 7

2 Build data literacy

Act and assess

TEAMS AND STRUCTURES

1 Organize for collaborative work

8

Strategic Tasks

1.1 Establish the structures of inquiry
1.2 Prepare to team effectively
1.3 Take stock to inform scope

Strategic Task 1.1: Establish the Structures of Inquiry

Your first task is to *adopt an improvement process*. If you are reading this book, we imagine that this task might be complete: you've chosen Data Wise. Another task is to *make time for collaborative inquiry*, which often means adjusting or expanding the amount of time when educators can work together. Time tends to be one of the biggest barriers to staying the course on continuous improvement; consistent meeting time of significant duration helps people focus and it makes the work between meetings more likely to happen. We have found that teams make the most progress when they commit to meeting at least seventy-five to ninety minutes every other week, which amounts to less than 2 percent of a typical employee's work time. It is a small investment that can pay dividends when protected. That said, teams that can commit to sixty minutes once a month still get enough traction to make an impact.

Finally, you need to *build a strong system of teams,* which involves planning carefully who should be engaged and how the work of your team will interconnect with other teams. This should be enough structure to get started if you plan to use Data Wise practices on your own work, but you need to consider several more actions if you are scaling Data Wise practices across your system.

The goal of inquiry is to create positive change, but institutions by nature are designed to resist change.[1] So when scaling Data Wise across a system, you'll need to *secure the support and engagement of system authorizers*: the people who sign checks, cut through red tape, and have the power to sanction any departure from the "way we do things here." The system leader and school board members are always on this list. The list can also include community leaders, union leaders, elders, and trusted advisers at all levels of the organization. System Wise leaders know that authorizers must engage and champion the improvement effort or it will be abandoned in the next budget cut or shift of political winds, so they think carefully about the level of involvement in the work that makes sense for each authorizer. In your context, you may choose to invite some authorizers to participate fully in the inquiry process, others to join meetings as guests, and still others to respond to consistent communication and updates on progress. However you engage your authorizers, the key is that authorizers see how having all educators in the system use a shared improvement process will help advance *their* priorities for the system too.

Authorizers are essential, but so are the people who will roll up their sleeves and do the work of integrating the Data Wise process into people's daily work. That is why this strategic task also involves *launching a guiding team that is responsible for scaling Data Wise* and *building a foundation for symmetrical teams across the system*. The guiding team is composed of people who are responsible for steering the work of implementation, but this team is only one piece of the puzzle. There will be additional teams within system-level divisions and within schools, and System Wise leaders plan how these teams will coordinate and communicate. There is extraordinary power in having these teams be symmetrical along key dimensions: how they are structured, their approach to collaborative work, and the language they use to talk about the work.[2] System Wise leaders can leverage these commonalities in candid conversations where people identify points of connection between teams and clarify the responsibilities and autonomies of each. In each of these conversations, System Wise leaders begin by establishing how each team prefers to give and receive communication and feedback.

Improvement cannot happen without allocating time, people, and stuff. That is why System Wise leaders recognize and deliver on their critical role to *allocate structures and resources for scaling Data Wise*.[3] Finding time for the guiding team and other teams enacting Data Wise can be difficult. We have seen many creative solutions to this challenge over the years, including staggered starts for staff, collaborative Wednesdays where all work time is teamwork, and compensated time beyond the workday. In our experience, "not having the time" could be an explanation

that masks other fears and mental barriers to the change process. If you can't find the time, you are prioritizing competing interests over collaborative work and not all of those interests are serving you, your educators, or your students well. While this may not fit with your perception of yourself, if you wanted to make time, you would. So make the time for yourself and for others. Your future self will thank you.

With time sanctioned and protected and teams established, the stage is set for collaboration. Strategic task 1.2 helps you think about what to do once you have everyone in the same room.

Strategic Task 1.2: Prepare to Team Effectively

Effective teaming requires preparation and intentional design, and this task looks very similar when a system leadership team uses collaborative inquiry to improve its own practice and when a guiding team is scaling Data Wise across a system. As we discussed in the ACE Habits of Mind section of this chapter, two important things to do early on are *setting norms for collaborative work* and *developing a shared why*.[4] We mention the importance of a shared *why* frequently throughout this book. You can find instructions for the Shared *Why* Protocol in the appendix.

We use this icon to help you quickly find the sections that leverage your shared *why* to advance the work of your team. The shared *why* is a way to collaboratively enact the principles from Simon Sinek's *Start with Why: How Great Leaders Inspire Everyone to Take Action*.[5] As we attempted to model in the introduction, there is power in beginning with *why*, then explaining *how* you approach your work, and ending with *what* you actually do. If you see this icon, spend some time thinking about how you could leverage your shared *why*.

With a shared why in place, the next step is to take some time to deeply consider and *agree on a vision for an equitable school*. It is possible that your individual why is rooted in a goal for equity. The Data Wise Project's vision is designed to center "each learner" in all instructional conversations. While the term "equity" is common, it is often conflated with justice, fairness, and even equality. Having a dialogue about team members' individual understanding and experience with

working toward equity provides a foundation for co-constructing a common vision and shared understanding.

In addition, it is helpful to *set expectations for effective meetings*, which you can do by adapting some of the practices in *Meeting Wise: Making the Most of Collaborative Time for Educators*, including agreeing on a meeting template that ensures you pay attention to purpose, process, preparation, and pacing and addressing common dilemmas that meeting facilitators and participants can face.[6]

Finally, take some time to *discuss workstyle preferences.* A few minutes spent early on to understand how people instinctively orient when working with a group can provide helpful insights that you can use to address interpersonal conflicts in the future.[7] This can lead to a conversation about the diversity of your *collective team identity*. For example, which work styles are well represented on the team and which styles might you need to deliberately cultivate? As a whole, do members reflect the different identities of the system, including the students you serve, with particular attention to identities that historically have less power and influence? Does the team intentionally make space for members who may be skeptical of change or who represent other interests? If you have inherited an existing team, you may have little room to adjust membership and will therefore need to think about creative ways to increase diversity, perhaps by providing more active roles for the system authorizers you identified in strategic task 1.1. If you are building a team from scratch, your goal is to have a team big enough to capture a mostly complete picture of competing perspectives without being so large that the team is unmanageable. In our experience, teams of four to eight members can be especially effective, but with intentional design around participation and strong facilitation, teams of twelve to fifteen can work well.

Preparing to team effectively for the purpose of scaling Data Wise also entails *clarifying roles on the guiding team*. Guiding teams are typically cross-functional, with each member having different responsibilities, perspectives, and priorities. How these cross-functional teams identify their individual roles is described in detail in the Attend to Dimensions of Scale section of this chapter.

Strategic Task 1.3: Take Stock to Inform Scope

Before your team engages in improvement or scales improvement, take stock of where you are *now*. Just as effective teachers begin by figuring out their students' strengths, background knowledge, and learning edges, System Wise leaders recognize that they are never starting from scratch with adult learners. In strategic task 1.3, teams go through different, but parallel processes depending on whether their goal is to use Data Wise to improve their own work or to scale Data Wise.

If you are engaging in Data Wise to impact the adult learners you directly support, we recommend you *assess current improvement efforts* by completing the Stoplight protocol available on the Data Wise website.[8] If you are scaling Data Wise, at this point your guiding team's work is to *evaluate system readiness for change.* We recommend that you gather evidence around the criteria summarized in the Readiness Guidelines for Systemwide Instructional Improvement Efforts, which you can find in the appendix. With either tool, teams discuss what strengths, weaknesses, opportunities, and threats they see in how prepared they are to collaborate.

Successful teams take the learning from their respective tools to paint a realistic picture of where they are now. Then they *identify collaboration priorities*: what are a few things they are going to do to improve how they work together? For example, when evaluating against the criteria, you may find that you have significant strengths, including a clear vision for improvement and protected time for collaboration. But you may also find that your system lacks robust norms of collaboration and that the coherence between the work of individual divisions is low. One mistake teams often make is thinking that they need to have all of the readiness criteria in place in order to begin. There are some criteria that you may want to address right out of the gate; you'll need collaborative norms in place before you can tackle anything else. But for other criteria, like coherence of activities, it is best to just dive in and learn the work by doing the work. The improvement process itself will provide a strong container for the coherence-building work.

With a shared understanding of the current state of the organization and a narrow set of collaboration priorities, you are ready to *identify which teams will engage in inquiry* and *set a pacing goal for the cycle* (if using Data Wise on your own practice) or *set a pacing goal for scaling* (if you are working to foster Data Wise practices across your system). Setting a goal for the cycle involves deciding where in the process you are starting and how long you expect your team to spend on your next improvement cycle. Experienced teams aim to go through two to three improvement cycles a year. New teams often start midyear and use the months they have to acclimate to the process and perhaps test-drive it on a modest goal. Others have to address complex issues of organizational culture and will rightfully plan to spend significant time on Steps 1 and 2, which could mean that the first cycle takes an academic year. We have found that teams benefit from revisiting Steps 1 and 2 in every cycle, and some even call them the "forever steps." Your context informs how long your cycles will be, and that is why it is important your team drives the pace of change.

Setting a goal for scaling involves deciding where you will start and how deep, locally owned, and differentiated you expect implementation to be for the next one

to five years. To make these decisions, you may consider culture, current context, resource availability, competing priorities, and external mandates. You will balance these factors against the urgency and importance of your shared *why*. For most teams, setting a pacing goal involves a pragmatic conversation where teams ask, How big a bite of the apple does it make sense for us to take right now? If your schools are already using an improvement process, you can focus on integrating the System Wise practices that will allow you to support school-level cycles more effectively. If using a shared improvement process is new to educators at both the school and system levels, you may consider starting the work in a few schools and then bringing along others when there is proof that "this can work here." We trust teams to select the pacing that is best for them and focus on ensuring that the team can use evidence to explain its choice.

Table 1.1 summarizes the strategic tasks for Step 1, depending on purpose. You may find this level of detail for tasks useful, or you may be ready to zoom out to a

Table 1.1

Strategic Tasks for Step 1, Depending on Purpose		
Step 1: **Strategic tasks**	**What this task looks like when:**	
	A SYSTEM TEAM IS SUPPORTING LEARNERS IT DIRECTLY SERVES	**A GUIDING TEAM IS SCALING DATA WISE ACROSS A SYSTEM**
1.1: Establish the structures of inquiry	• Adopt an improvement process • Make time for collaborative inquiry • Build a strong system of teams	• Adopt an improvement process • Make time for collaborative inquiry • Secure support and engagement of system authorizers • Launch a guiding team that is responsible for scaling Data Wise • Build foundation for symmetrical teams across the system • Allocate structures and resources for scaling Data Wise
1.2: Prepare to team effectively	• Set norms for collaborative work • Develop a shared why for our team • Agree on our vision for an equitable school • Set expectations for effective meetings • Discuss workstyle preferences and collective team identity	• Set norms for collaborative work • Develop a shared why for our team • Clarify roles on the guiding team • Agree on our vision for an equitable school • Set expectations for effective meetings • Discuss workstyle preferences and collective team identity
1.3: Take stock to inform scope	• Assess current improvement efforts • Identify which teams will engage in inquiry • Set a pacing goal for the cycle	• Evaluate system readiness for change • Identify collaboration priorities • Set a pacing goal for scaling

bigger picture of what System Wise approach looks and feels like in Step 1, which we offer in the following section.

TAKING A SYSTEM WISE APPROACH

Attend to Dimensions of Scale
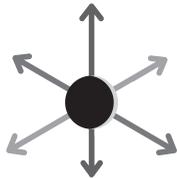
In the introduction, we introduced Coburn's and Dede's five dimensions of scale: depth, sustainability, spread, shift, and evolution. In Step 1, System Wise leaders often start by considering *depth* and *sustainability,* knowing that if the team championing Data Wise does not have deep skill in and knowledge of the work of improvement, there will be little chance that the process will successfully *spread*, *shift*, and *evolve*. To make progress with depth and sustainability, clarifying and assigning the roles on the guiding team (part of strategic task 1.2) is key.

Scaling for depth is possible when team members collectively have both the technical skills to lead the work and the interpersonal skills needed to address the adaptive challenges that are sure to arise. Technical skills might include content knowledge relevant to Data Wise, historical knowledge of the organization and key stakeholders, expertise in facilitation, or proficiency in management or continuous improvement practices. Interpersonal skills could include conflict management, decision-making, political mapping (identifying champions and detractors), coalition-building (creating shared ownership), and communication.[9] In initial meetings, we recommend that you have team members share the technical and interpersonal skills they bring to the group. This will help all team members know the teams' collective assets—and it will also reveal gaps. The goal is to identify and confirm that all needed skills exist on the team with some overlap to ensure sustainability of the team when membership inevitably shifts over time.[10] This skill-set balance then becomes part of your collective team identity. (See figure 1.3.)

To lay a foundation for eventual ownership of the work beyond the members of the guiding team (known as *spread* and *shift* in scaling terms), your team needs to be a cross-functional group that includes folks from different altitudes of the system, including system authorizers, those ultimately responsible for doing the work, and those in direct support roles of those doing the work.

The guiding team has several responsibilities that rely on its cross-functional composition: coordinating information and activity across the organization, incentivizing cooperation across organization boundaries, building capacity across the

Figure 1.3

A Guiding Team's Needed Roles and Skills

A Guiding Team's Needed Roles and Skills

Can Secure Leadership Commitment

Can Secure Resources

Can Remove Barriers

Can Make Decisions

Technical Skills
Content Knowledge
Data Wise Knowledge
Organization History
Facilitation Expertise

Interpersonal Skills
Communication
Political Mapping
Coalition Building
Conflict Negotiation

Shared Attributes
Diverse
Collaborative
Inclusive
Champion the Work

Respected by Stakeholders

Respected by Leadership

Can Motivate & Inspire

Does the Frontline Work

Get the Right People and Talents at the Table

organization to do the required work, and connecting both internal and external partners to the Data Wise work and each other.[11]

Discussing the following questions as a guiding team can ensure you are planning for scale from the very beginning:

1. What processes are in place to help harmonize information and activities across divisions?

2. What processes, power allocation, and cultural norms are in place to encourage working together?

3. What processes are in place to ensure team members and those they support have the skills to do the work required of them?

4. What processes are in place to develop relationships with internal and external stakeholders beyond the team?

A powerful strategy for supporting collaboration across the system is to have guiding team members serve on multiple teams where they can serve as ambassadors for the work. An assistant superintendent who is a member of the guiding team can build bridges to the other teams they serve on, for example, the system leadership team and the office of curriculum. Getting the right people and talents at the table will not guarantee success, however. That is why System Wise leaders expect the unexpected.

Expect the Unexpected

Building a new team or reestablishing a current team in light of a new goal offers an opportunity to reset expectations for how teams engage together or with other teams in the organization. But change is difficult, because—whether we realize it or not—change is associated with loss.[12]

Even when we are excited about our shared goals and believe that continuous improvement will lead to a better tomorrow, we need to understand that there is a process of letting go and a process of embracing the new, and both can be difficult. When you share your vision for scaling Data Wise beyond your guiding team, people may tell you that they are "all in" for the adventure. As a System Wise leader, though, you need to expect that things *will* get hard. Researchers have shown that as people process change, their emotions follow a "change curve" informed by Elisabeth Kübler-Ross's stages of grief.[13] The stages include shock, denial, frustration, depression, experimentation, decision, and (hopefully) integration. Individuals may experience the stages in a different order or even skip a few along the way. When we develop awareness of where others are in the change process, we can lean into empathy and show understanding. We can learn to see a team member's display of frustration as neither a personal attack nor a reason to abandon the improvement effort. It may just be an early stage in a process that we can teach ourselves to expect.

Or there may be a real conflict that needs to be resolved. And conflicts are to be expected! System Wise leaders anticipate that the various stages of change will lead to both internal and external conflict. We may tend to avoid conflict because we have so many images and experiences where conflict created winners and losers, or because we want to avoid loss. Scaling Data Wise will likely require compromise but doesn't need to require conceding. These four principles of negotiation support teams with attending to conflict before, during, and after it surfaces: [14]

PEOPLE ARE NOT THE PROBLEM. An individual living their truth and experiencing human emotions is not a problem to solve. As a System Wise leader, you resist the urge to conflate a person with a problem and remain curious

about the person. You choose to see each individual beyond their title, role, or résumé and practice empathy. You understand that change is a process.

THE SHARED INTEREST IS THE SHARED *WHY*. Focusing on isolated opposing views or actions is a distraction that can drag out the change process. Negotiation experts often talk of the power of uncovering shared interests. As a System Wise leader, you have already laid the groundwork for this. Whenever you return the team to your shared *why*, you provide an opportunity for each team member to untether themselves from an "I" position and reconnect with the collective purpose.
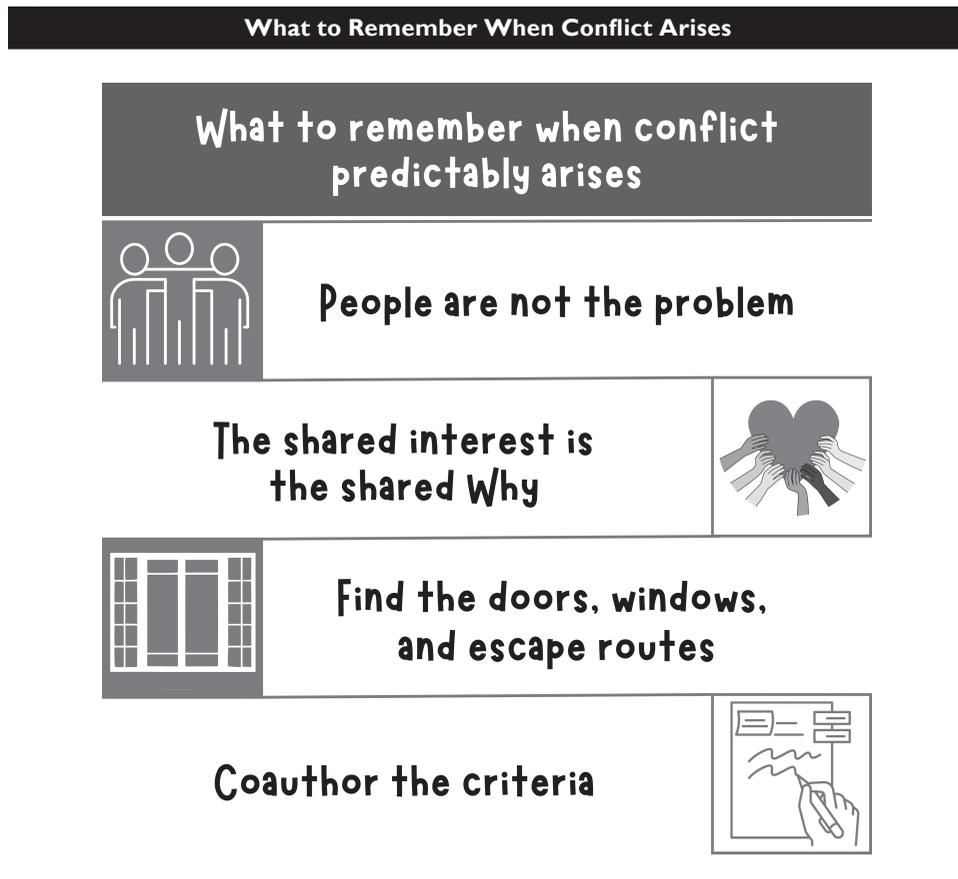
FIND THE DOORS, WINDOWS, AND ESCAPE ROUTES. Traditional conflict resolution typically leads to either/or thinking. System Wise leaders tap the wisdom of the team to cocreate options and alternatives that are mutually beneficial and in service of the shared *why*. Identifying a variety of possible paths forward empowers your team to make sound decisions.

COAUTHOR THE CRITERIA. Power dynamics can undermine your goals for negotiation and your progress through the change process. It may feel disingenuous to say that everyone on your team has equal power within your organization. But if you truly believe in collective wisdom, you can invite everyone on the team to be part of the process of creating the guardrails within which potential options can be evaluated. Coauthored criteria are not strict rules, but guidelines that increase the likelihood of agreeing on a path forward. (See figure 1.4.)

These negotiation principles can support System Wise leaders in taking a skillful approach to expected conflict. Khaleel's story shows what it looks like to approach conflict with the idea that "people are not the problem." (See "Khaleel's Story" on p. 40.)

We've learned time and again that a degree of psychological safety—the shared belief that it is OK to take risks, share concerns, and admit mistakes—is absolutely foundational for individuals and teams to lay the groundwork for looking at their own practice. Feeling this safety makes it possible for teams to consider how their own decisions may have created, or at least complicated, the very problems the system faces.[15] We can't tell you what types of conflicts will arise, but we can assure you there will be conflict. Engaging in developing a shared *why* and adhering to norms or agreements about how team members will treat each other will support

Figure 1.4

What to Remember When Conflict Arises

What to remember when conflict predictably arises

People are not the problem

The shared interest is the shared Why

Find the doors, windows, and escape routes

Coauthor the criteria

your teams in addressing and managing that conflict. Failing to do these things can result in conflict-avoidant teams that are unable to resolve the issues that matter most.

Manage the Change Process

As we mentioned in the introduction, System Wise teams manage change by being responsive to relationships, championing change, mapping the movement, and paying attention to power. In Step 1, managing the change process is often focused on laying the groundwork that allows a System Wise leader to be responsive to relationships. Penny's story offers a window into what this can look like. (See "Penny's Story" on p. 41.)

KHALEEL'S STORY

I've had the opportunity to lead two different schools, work for a state department of education, and work with a network of schools within a charter school organization. In one setting, we knew that it would be important to have a consistent improvement process across our system, and we chose the Data Wise improvement process.

When we initiated the work, some people were hungry for the learning, feeling that it was long overdue and what we needed. But there were those who expressed doubt because of our stops and starts with so many other initiatives in the past. I realized that we had an opportunity to bring people together in a constructive way, but I knew that we had to confront some deeper philosophical beliefs to make that happen. We gave people space to name their hopes and fears and identify ways in which we might mitigate their fears so we could break free from our past.[16]

For example, there was a narrative that our system's curriculum was aligned with state standards. I realized that the improvement process could shine light on the extent to which that was actually the case. Data Wise required that the data drive the narrative and helped us go beyond individual personalities.

Also, I got the sense that, given the high levels of staff transitions for some schools, those in leadership believed that we could bring change through personnel change management. Sure, you might get some artificial bumps in results that way: terminate someone here, reassign them there, change a reporting structure over there, but that's just a patch-up job with no long-term sustainability. And this type of change management meant we never got too far because we always had to restart for new people. I needed to help people see that we had the right people—we just needed to trust them.

My goal with Data Wise was to allow us to understand that we needed to let people with instructional expertise lead instructional decisions across our schools. This required negotiation between people who held decision-making power and those who were doing the work of teaching and learning. Finding non-instructional things for non-instructional team members to lead to help mitigate their experience of loss was an important part of this effort.

—KHALEEL DESAQUE
Pennsylvania, United States

PENNY'S STORY

In many years of leading improvement work, I've seen the essential role of school leaders in modeling and supporting teachers to successfully manage change. Leaders need to lead from the front, but also create the preconditions of trust and psychological safety needed to bring their people along. Because it can be so hard for leaders to shift habitual ways of leading, I make a point of creating opportunities for school leaders to build relationships with one another. Leading a school can be so lonely. So, when I bring leaders together, it is powerful to see them share their hopes and fears about leading in a different way and realize that they are not alone in their desire to do so. I model how to provide the preconditions needed to candidly share ideas about how they can support collaborative inquiry, which often involves stepping back to let teachers do the work themselves.

One way I do this is by asking school leaders to describe what it felt like to share their personal *why* story with staff. One leader explained that he had intended to share a "cleaned-up" version with those at his school. Then at the last minute, he found himself telling the real story, which revealed how he would have dropped out of school if it hadn't been for a teacher who asked him each day, "How have you been successful today?" The vulnerability he modeled in telling his "true" story caused a dramatic change in the way staff "saw" him, not just as their boss but as the young man who may have fallen through the cracks. Indeed, other school leaders who heard this leader share his experience later described how they were inspired to do the same, with similar impact.
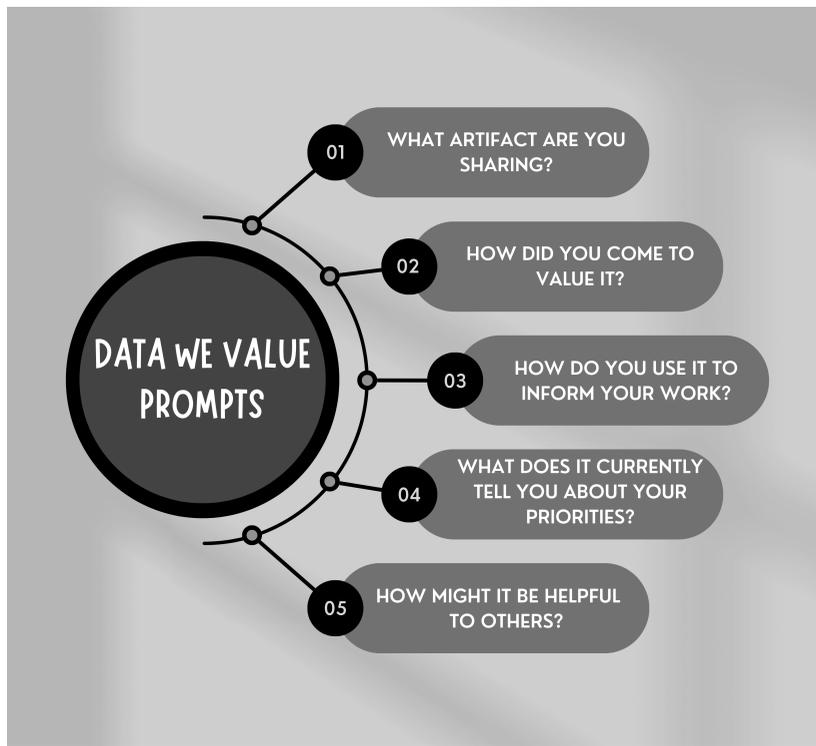
—**PENNY JAYNE**
Victoria, Australia

As Penny's story shows, one way of being responsive to relationships is by creating opportunities for empathy. We have found that building empathy around data can be especially important as you begin improvement work, in a large part because data have a legacy of being used by those in power as a weapon. You are likely to find that your colleagues may seem to hold a range of beliefs about the role of data

in education, but when you probe deeper, that is because they have very different definitions of what they mean by "data." (See figure 1.5.)

Teams can build relationships rooted in empathy by telling the stories of the data they value.[17] These stories give each person an opportunity to share an artifact—a report, a chart, a tool, observation notes, student work—that they use to do their job well. The key is that the artifact must be a source of evidence they truly value, so much so that they feel they could not do their job without using it. One way we ask teams to select artifacts is to request they bring something that they would create or use, *even if their organization did not provide it*. Each team member then addresses a set of prompts that tells the story of how they learned about this data source. You can find instructions for the Data We Value Protocol in the appendix.

Figure 1.5

Prompts for Data We Value

DATA WE VALUE PROMPTS

01 WHAT ARTIFACT ARE YOU SHARING?

02 HOW DID YOU COME TO VALUE IT?

03 HOW DO YOU USE IT TO INFORM YOUR WORK?

04 WHAT DOES IT CURRENTLY TELL YOU ABOUT YOUR PRIORITIES?

05 HOW MIGHT IT BE HELPFUL TO OTHERS?

With this foundational relationship building, teams are well positioned to leverage radical inclusivity to mitigate bias and ensure that they truly welcome multiple perspectives.

Practice Radical Inclusivity

You are likely attempting to use Data Wise in a system that was not designed to work well for all learners. Exclusivity and exceptionalism rooted in bias are belief systems that have dominated societies worldwide. All nations have an education origin story that begins with the education of *some* citizens, but not *all*. Education was originally designed to support the development of those with wealth, power, or religious affiliation in order to maintain the family lineage and superior status. Colorism (discrimination based on skin color) has also played a significant role in determining who is educated in South Africa, India, South America, and the United States. In many places, it used to be unlawful to educate girls or people of lower classes because of fear that they might rise from their subdued social status and compete for positions and resources.

As a result of protests, civil wars, and court battles, many countries now espouse the value of educating all citizens. Education is a right and privilege that affords our communities greater understanding, creativity, and advancements. Over the last hundred years, we have witnessed a global movement toward equity in education for students and citizens vowing to continue to strive for this until it is clear that *demography doesn't equal destiny*.[18]

With this charge and the daunting gap between it and our current reality, System Wise teams ask themselves: *What structures best support our ability to remain curious?* With this question, you embrace the idea that someone else's perspective could be just as insightful as your own, and you begin to let go of the "knowing" that is so incentivized in educational settings. You resist maintaining the status quo and consider your own role in working toward a more just future.

Team members must be ready to determine the degree to which they believe that governments and institutions, *including their own,* continue to perpetuate a system that values the leadership of *some*, but not *all*. Recognizing this pattern is an important first step in creating the conditions for your system to practice radical inclusion. Given the legacy of exclusion, tinkering toward improvement while maintaining current practices may not be enough to achieve your team's shared *why*.

Beverly Daniel Tatum uses the analogy of the moving walkway at the airport to describe how to break cycles of injustice.[19] She explains that simply standing still on

the moving walkway does not change your direction, only your speed. Even if you turned to *face* the other direction, you would still be dragged along. Tatum exhorts us to turn around and *run* in the opposite direction, to actually move counter to the momentum. The work of System Wise teams is to first identify the exclusive walkways, then move against unjust, inequitable, and biased practices at all levels of the organization. They actively pursue inclusivity through systemwide infrastructure, guidelines, practices, and performance assessments.[20] For example, many organizations have committed to shifting their recruitment, hiring, and retention efforts to establish a more diverse workforce. Yet the procedures and expectations for promotion within these organizations have changed very little, if at all, which results in leadership teams that do not reflect this diversity. System Wise teams appreciate the need to reimagine selection procedures for those teams.

Step 1 offers leaders an invitation to deeply think about team composition, with considerations of team skill and roles as described in the Attend to Dimensions of Scale section of this chapter. Donna's story shows what practicing radical inclusivity can look like when considering team composition. (See "Donna's Story.")

DONNA'S STORY

Having a shared improvement process allowed our system to work and learn in ways that I had never seen before. We literally became a learning organization, in part because we used a common process and used common language and protocols, and this developed common knowledge.

I was a member of the Improvement Office. I coordinated support from various system instructional offices to several school leadership teams. Once, during a debrief of an instructional learning walk attended by system-level leaders, someone noticed that paraprofessionals (classroom personnel without a teaching license who support teachers with instruction) were actively engaged in teaching small groups of students. But paraprofessionals were not invited to the debrief, which left their perspectives about how students were engaging with them and the content out of the analysis. During our debrief, we committed to changing this.

> After several drafts and many conversations, we landed on a schedule that allowed everyone to be at the table. Paraprofessionals had to have computers to access our rolling agendas and data during meetings, so we provided them with devices that students weren't using. During the meetings, they saw themselves as being on the same level as the team of teachers. They were no longer "just the paraprofessional." This work allowed us to see the value of every person in the stakeholder group.
>
> As I shared this story across schools, more school-based leadership teams across the system began including their paraprofessionals in meetings. All of a sudden, everybody understood that anyone who was in an instructional capacity had an impact on a child's learning. We were doing equity work and weren't even calling it that.
>
> —**DONNA DRAKEFORD**
> Washington, DC, United States

System Wise teams pursue radical inclusivity by recognizing and mitigating bias as often as necessary. If you study how the eyes of any living being work, there are light-sensitive cells that send information to the brain through the optic nerve. Where the optic nerve attaches to the eye, there are no light-sensitive cells, so this part of the eye cannot see and creates a blind spot. This biological reality is a helpful metaphor when we think about how no individual can see the whole picture without the help of others. Engaging in the completion and analysis of the Readiness Guidelines with community members beyond the guiding team, especially families and students, provides teams with additional data points, illuminates blind spots, and reduces bias.

CASE STUDY REVISITED

◼ That afternoon, Jasmine is participating in the guiding team that meets biweekly with their coach Charlie to prepare to scale Data Wise across the Greenwood School System. She reflects on her morning meeting with the leadership team, saying, "I'm realizing that when I think about the work from each person's perspective, I would come to the same conclusions that they do—even though those conclusions are so different."

Charlie encourages Jasmine: "It isn't your job to have the answers; the answers will come from everyone bringing their best thinking. How might you communicate that to your leaders?"

A guiding team member nods and shares, "As we prepare to integrate the Data Wise improvement process at all levels of our system, it would actually be really comforting to know that you and the leadership team are test-driving the process in your own work." He looks at Jasmine with encouragement. "I strongly believe that changing how both the leadership team and this guiding team function as teams is the first step. Perhaps in this meeting we can talk about what this group can do to really organize for the collaborative work that lies ahead and figure out how we can pilot some practices here that could be useful on the leadership team as well."

Charlie supports the guiding team with setting norms, developing a shared *why* for their team, and setting themselves up for their next meeting, where they will hear everyone's perspectives on how different sources of evidence can support their purpose. Jasmine leaves the meeting confident that many of these same activities will serve the leadership team well at next week's retreat.

REFLECTION QUESTIONS

1. How can we create a community where each person is known and belongs?

2. How do our identities, beliefs, actions, and values interact with and influence each other?

3. How do our individual *whys* connect to a shared *why* for our team?

4. How representative is our team of the learners we serve? What does this mean for our work?