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Please enjoy this complimentary excerpt from Fixing Education Initiatives in Crisis.

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Crisis Overview

Before we go too far, it's helpful to quickly lay some groundwork for the crisis-combating work you're about to launch. This first section provides some essential background information about programs and initiatives and a high-level description of the six types of implementation crises we commonly face. Plus, to inform the decision of where to "dive into" this work, there is an assessment you can use to review and prioritize your jumping-off point. Specifically, this Crisis Overview covers the following topics:

- Program or Initiative. What's the Difference?
- When Crisis Strikes: Our Six Types of Crises
- Planning Your Attack: How to Proceed
- Cases and Examples to Inform Your Thinking

Program or Initiative. What's the Difference?

Before we jump into crisis and course corrections, it seems smart to offer a bit of positioning. I've grown fond of the term **initiative** because it best describes the efforts that produce predictable results and measurable impact. *Initiative* is compared to the more traditional term *program*, or *educational program*. Really, programs and initiatives share much in common. At their core, they should be defined efforts that are carefully matched to the intended participants' needs, framed by predefined outcomes, and implemented to bring about predetermined results. So far, so good.

The challenge for education leaders is that we operate within very complex systems. There's no shortage of both programs and initiatives with which we must contend daily. To think that any given program can operate in a vacuum, without attention to the people and systems around it is, well, one great way to reach the point of crisis. So, this is the primary reason for using the term *initiative*. It best reflects reality by describing what it *really* takes to understand, design,

implement, and evaluate something that will predictively produce positive change. Whether the initiative involves transitioning educators districtwide to culturally relevant curriculum or trauma-informed care, or engaging students in linked learning pathways or dual immersion or dual enrollment efforts, it's easy to see that success requires a carefully orchestrated effort. For me, that speaks initiative.

Programs Versus Initiatives: There Is a Difference

In *Right From the Start*, I illustrated the difference between program and initiative using the familiar iceberg model (Marshall, 2023). It is included here (Figure 1) to drive home the difference between these two commonly encountered entities.

FIGURE 1 Iceberg Model Comparison of Programs and Initiatives



SOURCE: Marshall (2023).

You'll catch me using the term *program* interchangeably with *initiative* in the pages that follow. And that is perfectly fine if we have a shared understanding of what is required for success, be it a program or an initiative. Your organization's vernacular might not embrace the "initiative" phraseology. If you're facing crisis, now is not the time to begin a terminology reformation campaign! Yet, the eye-popping crises we are about to explore typically stem from programs or initiatives that failed to fully embrace the true range of factors that are requisite for success. Let's move forward with an *initiative* mindset

because, by definition, implementing an *initiative* rivets attention to the systemic elements necessary such that predictable outcomes for everyone involved are achieved.

When Crisis Strikes: Six Types of Crises

You’ve likely picked up this book because you have a program or initiative in crisis. Let’s jump into your challenge by defining six types of crises that frame our go-to strategies (Table 1). The chapters that follow go into further detail.

TABLE 1 Crisis Overview—Six Types of Crises

Crisis Type	Short Description
1. Failing to “Get Smart” Crisis	The planning crisis involves no planning, not enough planning, or not the right planning at the start. In the ideal world, the intent is to get smart about the need, people involved, and ideal outcome(s) before determining the initiative’s composition.
2. Outcomes Crisis	Defined, overt, measurable, and achievable outcomes provide a guiding “North Star” for any initiative. When outcomes aren’t defined, they’re vague and lack measurability, they don’t describe the impact we truly seek, or they describe an outcome other than the one we want, we face an outcomes crisis.
3. Attention Span Crisis	People get on board early, and then a million other things cross their in-boxes, as requests for support—financial and otherwise—come in. Just six months later, they’ve already forgotten their commitments to the initiative. This crisis can also occur when attention isn’t sustained over time.
4. Data Crisis	Not having the right data, at the right time, for the right purposes. Often, the data piece is like a can kicked down the road, with the design tasks taking priority. Yet, building data into any initiative is something best done as part of the design.

(Continued)

TABLE 1 Crisis Overview—Six Types of Crises (*Continued*)

Crisis Type	Short Description
5. When Things Don't Go as Planned Crisis	Implementing programs isn't easy or fast. Even the best-laid, most data-informed initiative designs can still face stormy weather when the "program meets world." When things don't go as planned and implementation stalls, you're facing what I term the D-GAP (don't go as planned) crisis.
6. Sustaining and Scaling Crisis	Sustaining an initiative long enough to demonstrate its value can be a challenge, as can keeping a successful initiative in place long term. When we find something that works, we want others to benefit. This gives rise to a scaling effort, which typically involves bringing an established program to a wider group of participants. Challenges to either sustaining or scaling an initiative give rise to the sustaining and scaling crisis.

Planning Your Attack: How to Proceed

If a program implementation crisis brought you here, perhaps that crisis is vivid and focused. It may quite plainly be a lack of data to demonstrate the program's value. Yet, when things have gone sideways, more often we face a combination of crises. For example, the attention span crisis is often found alongside many of the other five crises. So, how do you best proceed? Here are three likely scenarios.

1. When one is facing a crisis, your best moves are to understand it, reflect on it, and then develop a responsive solution or set of solutions to improve it. Because you should quickly reach the point of *action*, this book is necessarily snappy. It's designed to swiftly get you there. Thus, you may simply want to read straight through and benefit from an understanding of the full set of crises and the solutions available for their resolution.
2. Now, if the crisis you face is sharply focused, you may want to press forward simply by reviewing the guidance for the crisis you face and working forward to affect improvement using the aligned strategies in the latter half of this book.
3. If you're facing multiple crises, or you're interested in quickly assessing and prioritizing the challenges you face, I suggest you begin by using our first tool, Prioritizing Your Crisis Intervention.

1. Triage Tool: Prioritizing Your Crisis Intervention

The following assessment is designed to help you prioritize your efforts to turn around a faltering program. Here’s the scale you’ll use to answer each of the following questions. Simply enter a numeric value to reflect your situation in the “Score” column for each statement.

Crisis Level	0	1	2	3	4
Description	Not true for my initiative	A little true for my initiative	A concern for my initiative	An established need to address for my initiative	True crisis—urgent need to address for my initiative

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Crisis Assessment Tool

Question	Score	A	B	C	D	E	F
1. We lack a deep understanding of the people for whom this program is targeting.							
2. We should have taken more time to define, or benchmark, the current situation.							
3. We are unclear about each of the root causes that could explain why there is a problem.							
4. We defined what we want our program to achieve, but it's not in measurable terms.							
5. When it comes to impact, we've yet to fully elaborate what we want to see from the people involved.							
6. We worry that some outcomes may not be achievable or only achievable after many years' time.							
7. Our initiative began with interest and support from the higher-ups, but there's been little attention or support of late.							
8. We've heard people questioning whether our initiative is worth the investment it requires.							
9. We've not successfully promoted our program and its accomplishments; supporters across the school/district are becoming disengaged.							
10. We've yet to define the available data or what we should collect, to support of our program's continuous improvement and/or document its accomplishments.							
11. Data will come in time, only when the program is more mature.							
12. We have people asking us for data to justify our program's existence, but we simply have nothing to offer.							
13. We need people to implement the way we designed, in terms of running the program the "right" way.							
14. We never anticipated the number of conflicting programs and other things that rivet attention away from the basic work to make this program a success.							

Crisis Assessment Tool (continued)

Question	Score	A	B	C	D	E	F
15. While we designed this program to engage, our participants don't seem to care, or they just don't believe they can be successful with it.							
16. We've seen success with this new program, so let's implement it across the district as quickly as possible.							
17. The budget/funding/grant was super helpful getting this initiative off the ground, but we're unsure how we will sustain it in the long run.							
18. There is so much to do, and so little time to do it. We're unsure where to focus our efforts for the greatest program-related impact.							
Totals							

Next, transfer the score value into the available (non-shaded) column for each question. Then, total each lettered column at the base of the worksheet. These columns represent our six types of crises in the following way:

- A. Failing to “Get Smart” Crisis
- B. Outcomes Crisis
- C. Attention Span Crisis
- D. Data Crisis
- E. When Things Don't Go as Planned Crisis
- F. Sustaining and Scaling Crisis

Compare the scores you've established for each of the six columns. At the two extremes:

- A score of zero would suggest there is no evidence of crisis.
- A score of 12, the maximum, indicates what would be a significant crisis.

Contemplate your answers and the compare the values you've achieved and let them guide your next steps. If there are one or two areas that are clear priorities, your best next step may be to read the corresponding chapter(s) for that crisis or crises. If you've evidence of challenges in many areas, consider proceeding forward chapter-by-chapter.

Cases and Examples to Inform Your Thinking

The remainder of this book is dedicated to identifying various initiative crises and then supporting your resolution efforts through tools and checklists. At times you will review examples from my own library of projects and initiatives. We'll also make use of two case studies to illustrate the application of some tools. While the following fictional crises may not match the same challenges you face, they will help you understand the solutions in action. Consider marking this page for quick reference at the points we revisit each of our two cases (Table 2).

TABLE 2 Case Study Profiles

	Example 1: New Elementary Teacher Supports (NETS) Program	Example 2: Fifth-Grade Camp Program
Brief Description	Training and supports for elementary teachers in their first two years of service.	Fifth graders head to a residential camp with their classmates and teachers during their fifth-grade year.
Goal	Reduce the time-to-competency; hasten classroom impact as early as possible.	Experience the outdoors in new ways, grow through outdoor programming while being away from home for a full five days.
Participants	All K–5 educators across the district in their first two years of service.	All fifth-grade students across the district.
Launch	Currently in fourth implementation year.	Program running for 24 years, minus a necessary COVID hiatus.
Current Status Highlights	<ul style="list-style-type: none"> • Intended as a sort of professional learning community (PLC). • Spotty implementation has plagued the program from its start. • Pockets of success exist, but the successes are not something you can count on reliably or districtwide. • Questions are coming from central office about the program and both its design and cost. 	<ul style="list-style-type: none"> • Costly to implement. • Many parents, administrators, and teachers ask, what really happens at camp? • Some have questioned equity of the experience for teachers, since only 1/13 of the district's teachers participate. • Teachers have asked, "Why must I keep doing this?" and

TABLE 2 Case Study Profiles (Continued)

	Example 1: New Elementary Teacher Supports (NETS) Program	Example 2: Fifth-Grade Camp Program
		<p>“Couldn’t the paid counselor/teachers at the camp handle it with me?” while suggesting there should be some compensation for working these extra hours while away.</p> <ul style="list-style-type: none"> • We’ll refer to the teachers bringing their fifth-grade students as teachers, and the teachers who are permanently assigned and working at the camp as camp teacher-counselors, or simply teacher-counselors.

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