

# **From Insight to Impact: A Shared Strategy for Systemic Improvement and Implementation**

---

Nick Syrrist  
Jeremy Sawtelle



**SHASTA**  
COUNTY OFFICE OF  
EDUCATION



## **Will Barnett**

Will Barnett, Senior Director of Continuous Improvement, leads State and Federal Programs for Shasta COE, supports staff in the Educational Support Services Department, including regional improvement efforts as the GeoLead/Far Northern Partnership across 11 northern California counties, helping schools build stronger systems and positive cultures where students and staff can thrive.



## **Jeremy Sawtelle**

As the Director of Specialized Student Support for the Shasta County Office of Education, Jeremy focuses his efforts on Improvement Science and human-centered systems design. He applies this expertise to provide coaching and guidance, leading teams through the complexities of organizational innovation and implementation throughout California. Informed by a variety of leadership capacities locally and statewide, Jeremy brings a comprehensive perspective to creating sustainable systems.



## **Nick Syrrist**

Nick is a Director for District and School Support for the Shasta County Office of Education. Nick believes the next challenge, the next performance gap, the next decision to make is always coming. Given that change is something we can predict, it is something we can therefore manage through a system-based framework.

## The Layers of the Middle School Crisis:

A Historical Perspective

### 1980s-1990s THE CRACK EPIDEMIC

- Parental Incarceration
- Community Violence
- Unaddressed Trauma

TRAUMA

INSTABILITY

### 2001 NO CHILD LEFT BEHIND

- High-Stakes Testing
- Underfunded Support
- Pressure Over Preparation.

DISCONNECTION

### 2020+ COVID-19 PANDEMIC

- Social Isolation
- Disrupted Learning.
- Attendance Collapse

### TODAY MIDDLE SCHOOL IMPACT

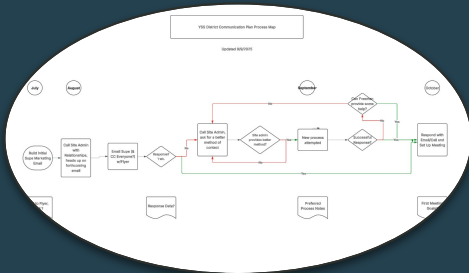
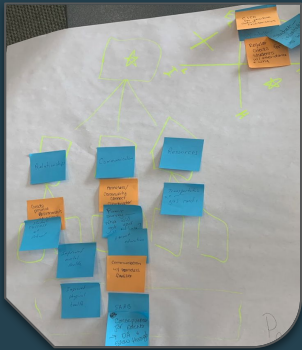
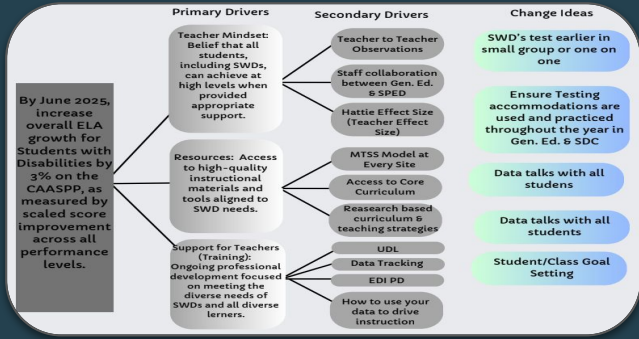
- Behavioral Dysregulation
- Social Skill Deficits
- Chronic Absenteeism
- Emotional Instability.



**Question:**  
When is a 'good time' to begin a response?

**Change is Constant.  
Maintenance is a Routine.**

# Improvement Science



VISION

CURRENT REALITY

*A definition-* The ongoing disciplined **effort of everyone** in the system to discover **evidence-based changes learning**, stronger system performance and better outcomes.

\*Improvement Science Collective

*...We have observed teams use **Improvement Science** to unpack their complex systems and then fail to make change due to ineffective ideas put into the right place.*

*“Analysis Paralysis”*

# Implementation Science

**When defining implementation science, some very non-scientific language can be helpful...**

- The intervention/practice/innovation is **THE THING**
- *Effectiveness* research looks at whether **THE THING** works
- *Implementation* research looks at how best to help people/places **DO THE THING**
- Implementation strategies are the stuff we do to try to help people/places **DO THE THING**
- Main implementation outcomes are **HOW MUCH** and **HOW WELL** they **DO THE THING**

How we get “what works” to the people who need it, with greater speed, fidelity, efficiency, quality, and relevant coverage.

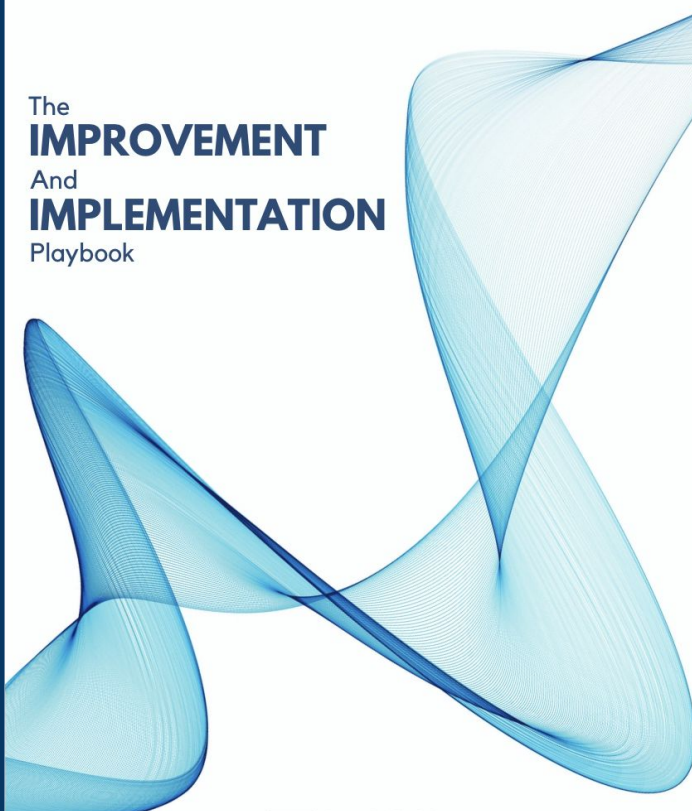
-University of Washington

*...We have also observed teams find effective ideas through  
**Implementation Science** tools and attempt to fit them into the  
wrong complex part of their system.*

*“We have another idea this year”*

*...Both of these attempts are frustrating for teams,  
take substantial time and resources, and lead to  
unwanted outcomes.*

The  
**IMPROVEMENT**  
And  
**IMPLEMENTATION**  
Playbook



JEREMY SAWTELLE / NICK SYRRIST  
VERSION 1

# OR...Both?

*This playbook is an attempt to use these two powerful frameworks and tools to guide teams through the investigation of complex human-centered systems and the implementation of strong evidence-based practices.*

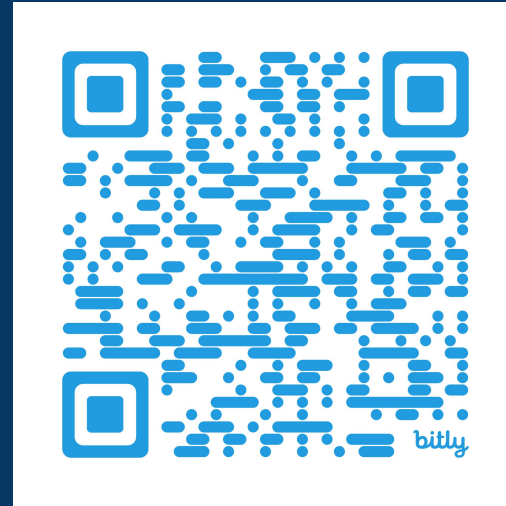
The  
**IMPROVEMENT**  
And  
**IMPLEMENTATION**  
Playbook



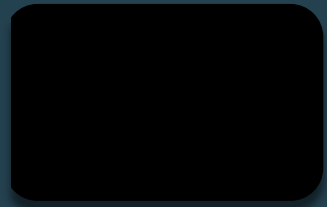
JEREMY SAWTELLE / NICK SYRRIST  
VERSION 1

<https://bit.ly/4pkQ1nz>

*Playbook Link*



*This is version 1*



Thank you...



What are the components of this  
Playbook?

# Section Outlines

---

## WHAT IS IN THIS PLAYBOOK?

### **Phase 1 -- Framing The Problem**

Identify A Problem – 11

Build A Team – 13

Establish a Huddle Protocol – 15

Map The Process – 17

Initiative Mapping – 19

Align to Mission, Vision, Values – 21

Gather Feedback – 23

## WHAT IS IN THIS PLAYBOOK?

### **Phase 2 -- Analyzing The Context**

Review Data Sources – 27

Update Problem Statement – 29

Cause Brainstorm – 31

Gathering Feedback – 33

### **Phase 3 -- Developing a Theory for Change**

Draft Theory of Action – 37

Define Key Metrics – 39

Narrow Focus – 41

# Section Outlines

---

## WHAT IS IN THIS PLAYBOOK?

### **Phase 4 -- Exploration**

Discover and Gather Ideas – 49

Discovery Cycles – 51

Fit and Feasibility – 53

Gathering Feedback – 55

### **Phase 5 -- Installation**

Action Planning – 55

The Pilot – 57

Review and Improve – 59

## WHAT IS IN THIS PLAYBOOK?

### **Phase 6 -- Initial Implementation**

Establish Feedback Loops – 63

Launch – 65

Review and Improve – 67

Decide if Change Should Be Scaled – 69

Status Check – 71

### **Phase 6 -- Full Implementation**

Maintain Consistency – 74

Expand Training and Readiness – 76

Report Results – 78

Maintain Efforts – 80

# PHASE 1

Framing The Problem

## Actions Preview

Identify a Problem

Initiative Mapping

Build A Team

Align to Mission, Vision, and Values

Establish a Huddle Protocol

Gather Feedback

Map the Process

## Recommended Tools

Impact/Effort Matrix

Team Creation Form

Norm Setting Protocol

Process Map

Initiative Crosswalk

Empathy Interviews

Affinity Protocol

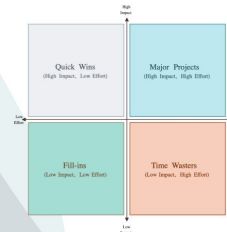
# PHASE 1

Framing The Problem

## Identifying a Problem

We all know that there is always something we need to fix, right? But before we can actually fix it, we need to pinpoint exactly what the problem is. It's not enough to just have a general idea. We need to clearly show what the problem is (that's our "Problem of Practice"). This means finding solid reasons and facts that prove the problem exists and why it matters.

It's very important for leadership to agree on what the problem is. If we're not all on the same page, we'll end up working in different directions, wasting our time and effort. So, our first job is to figure out one clear problem that is complex and human-centered, but also within the sphere of influence of the organization.



## Recommended Tools To Use:

The Impact / Effort Matrix  
Credit: The Improvement Collective

# PHASE 1

## Identifying a Problem

### Must Have - Progress Indicators

- The problem is high leverage systems work.
- There is a clear understanding of why this is a problem to build a team to improve.
- An initial problem statement has been drafted.
- The problem is complex.
- The problem is within the sphere of influence of the organization/team.

### Should Have - Progress Indicators

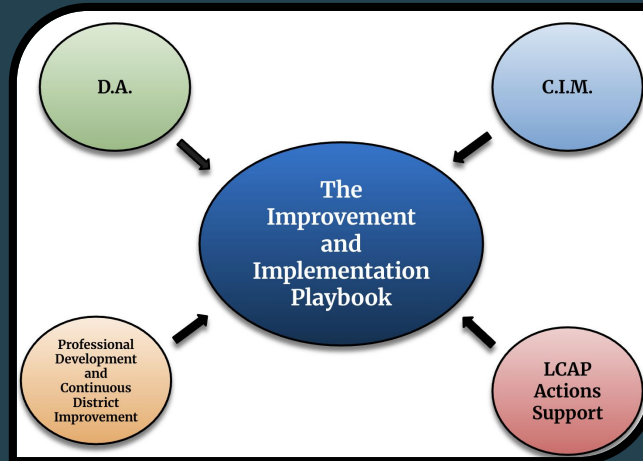
- The motivation to improve this problem is not a direct result of a compliance process.
- This problem was identified because of continuous data monitoring within the organization.



# Working through Human Centered Complex Problems in an Organization

*This Playbook Does Not Use Any Compliance*

## *Acronyms*



These are not once in a while tools. These can help solve daily challenges.

Phases 1, 2, 3  
“We have a problem”

Phases 4, 5, 6  
“We have an idea”

# What is the Problem?

---

Parent survey came back.

Pickup/dropoff was rated a 3/10 and a major area for improvement.

# The Affinity Protocol

---

Parent survey came back. Pickup/dropoff was rated a 3/10 and a major area for improvement.

**In your opinion: What are the main challenges affecting pickup and dropoff at your site?**

Use Post-It Notes. One thought per note. Volume game. 2 minutes tops.

[Please Note: The Prompt says 'challenges']

# What are we already doing?

<b>Name of Initiative or Plan</b> (if plan is required by an accountability process, please note if it is a district, state, or federal requirement)					
<b>Initiative or Plan Start and End Date</b>					
<b>Leadership of Initiative</b> (name of leader and key team members)					
<b>Relation to District</b> (or State, etc.)					
<b>Target Student Group</b>					
<b>Financial Commitment</b>					
<b>Expected Outcomes</b> (with measures)					
<b>Evidence of Outcomes</b> (data showing impact to date)					

Enter the Initiative Inventory.

Area of Performance	1	2	3	4
<b>Impact:</b> <i>Using data, what level of measurable impact does the initiative have on students?</i>	No data/No impact	Little impact	Some impact	High impact
<b>Support:</b> <i>What is the level of support provided to staff for implementation?</i>	No support/Little support	Occasional support	Mostly Supported	Fully Supported
<b>Fidelity:</b> <i>What is the level of fidelity with which the initiative is implemented (site or district wide)</i>	No fidelity/Little fidelity	Exploring	Initiating	Implementing

# Where to Focus: The Fishbone Diagram

**PoP:**  
Pickup/dropoff  
cited as a  
major concern,  
rated 3/10 on  
parent survey.

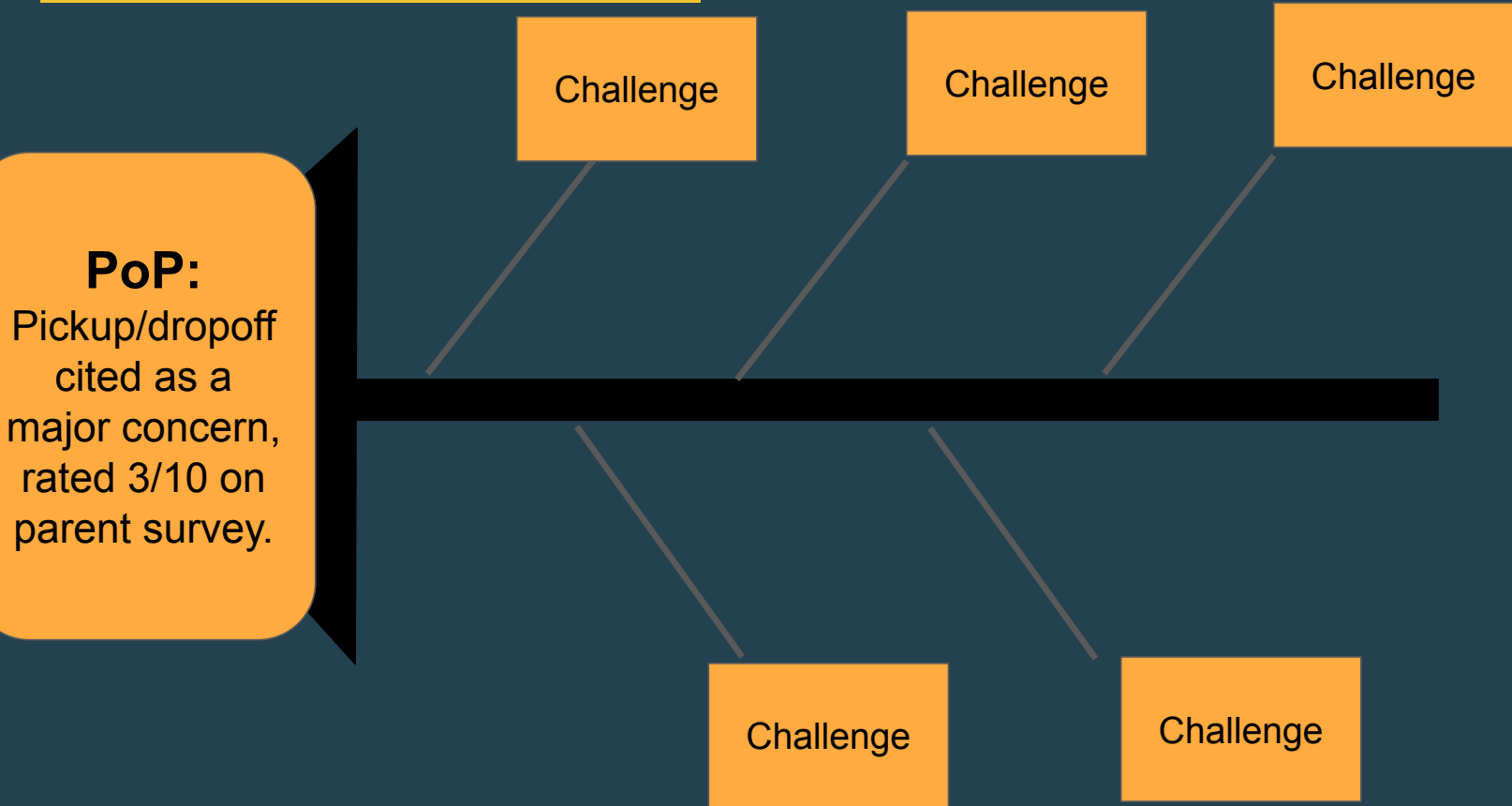
Challenge

Challenge

Challenge

Challenge

Challenge



# The Fishbone Diagram

---

**PoP:**  
Bus routes  
are missing  
students and  
late to school.

Challenge

Challenge

Challenge

Challenge

Challenge

# The Fishbone Diagram

---

**PoP:**  
Literacy rates  
remain flat  
despite  
current  
intervention  
efforts.

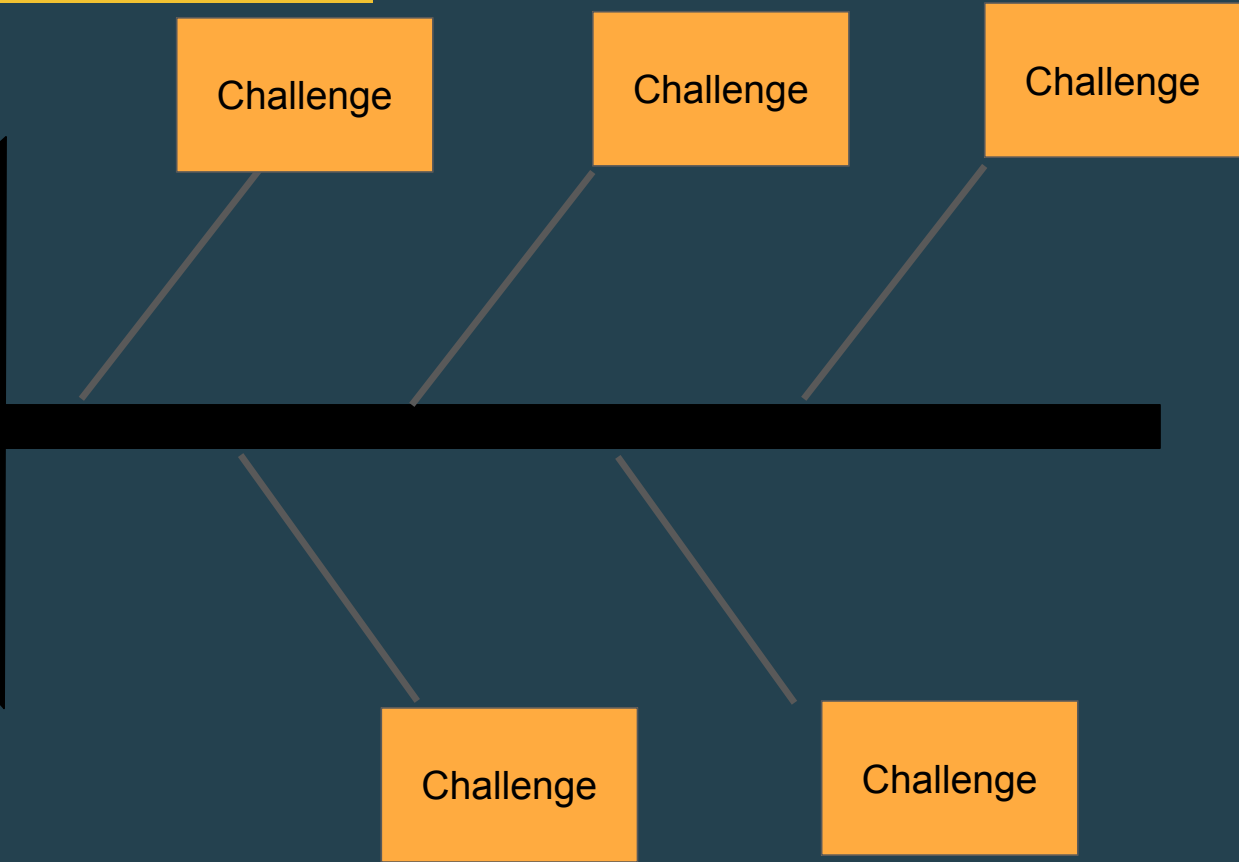
Challenge

Challenge

Challenge

Challenge

Challenge



# The Fishbone Diagram

---

**PoP:**  
Current  
reinforcements  
aren't working  
to drive  
positive  
behaviors on  
campus.

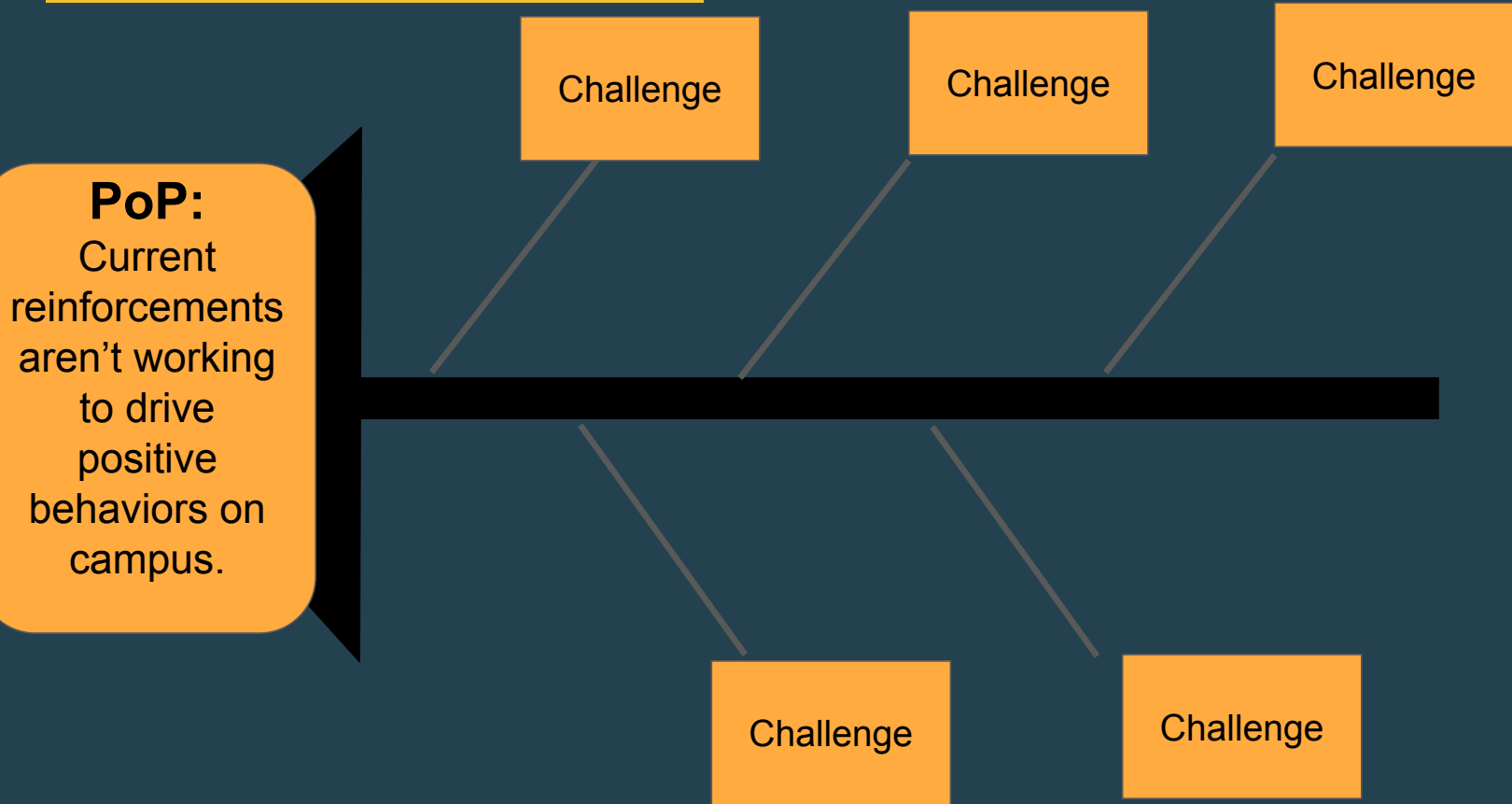
Challenge

Challenge

Challenge

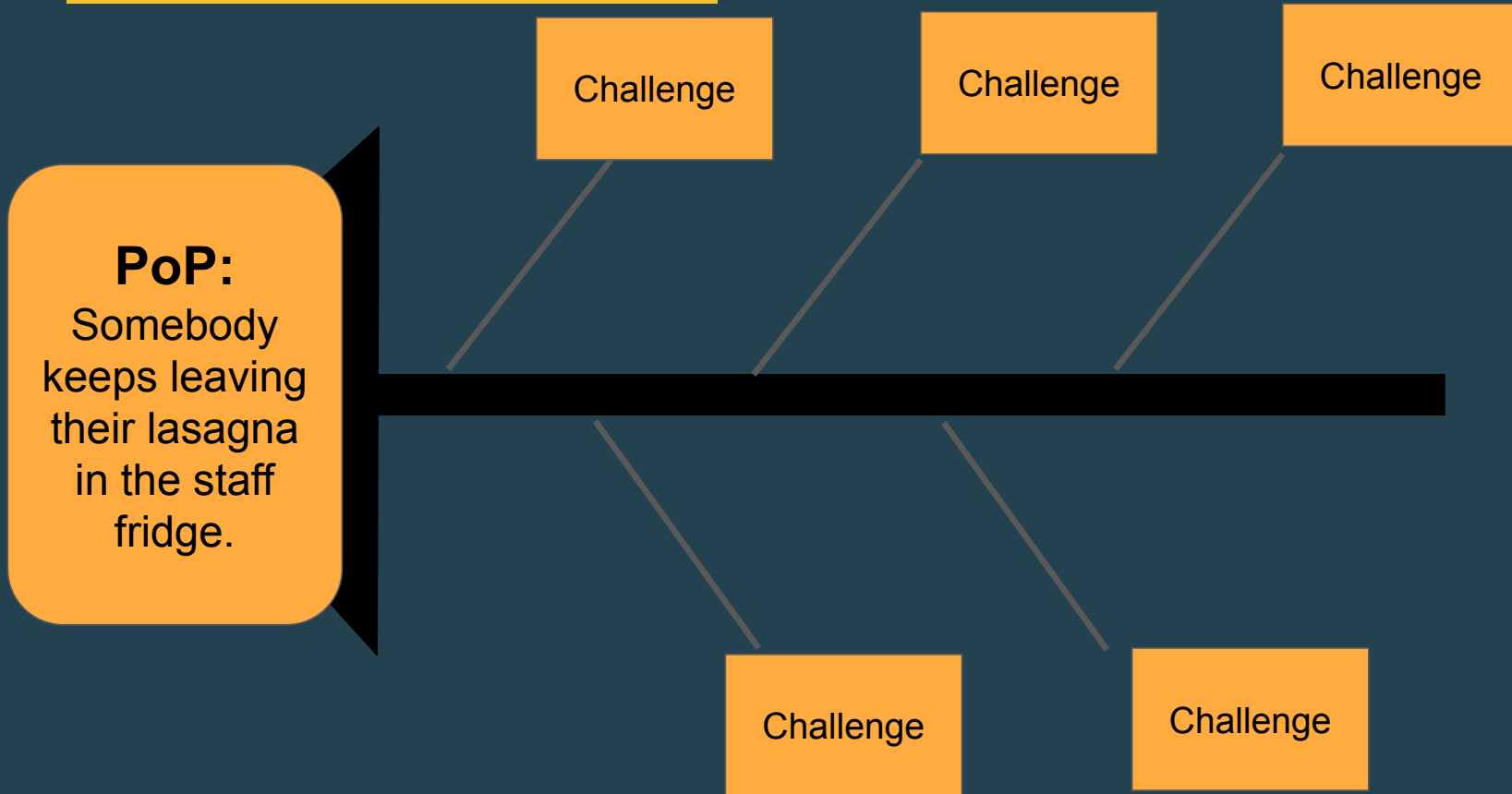
Challenge

Challenge



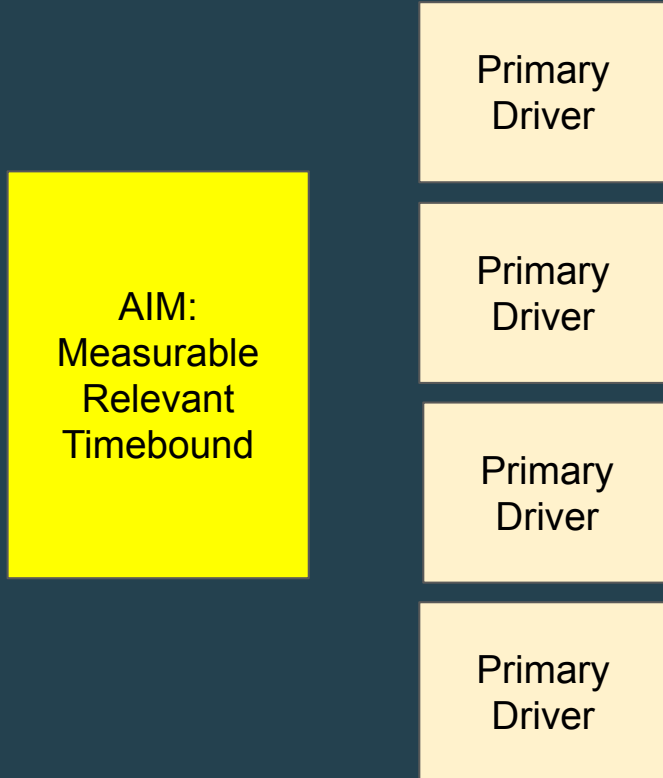
# The Fishbone Diagram

---



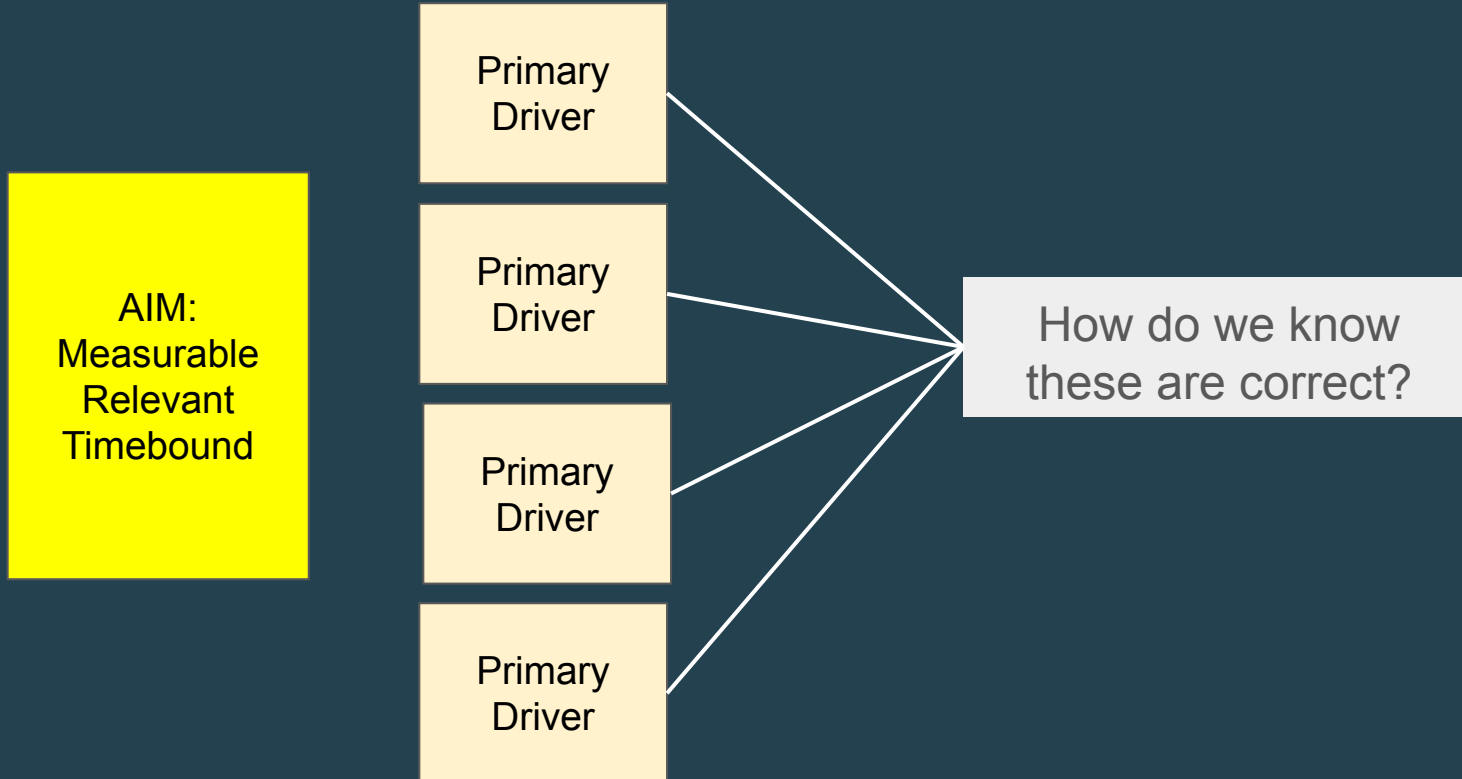
# Set a Goal: The Driver Diagram

---



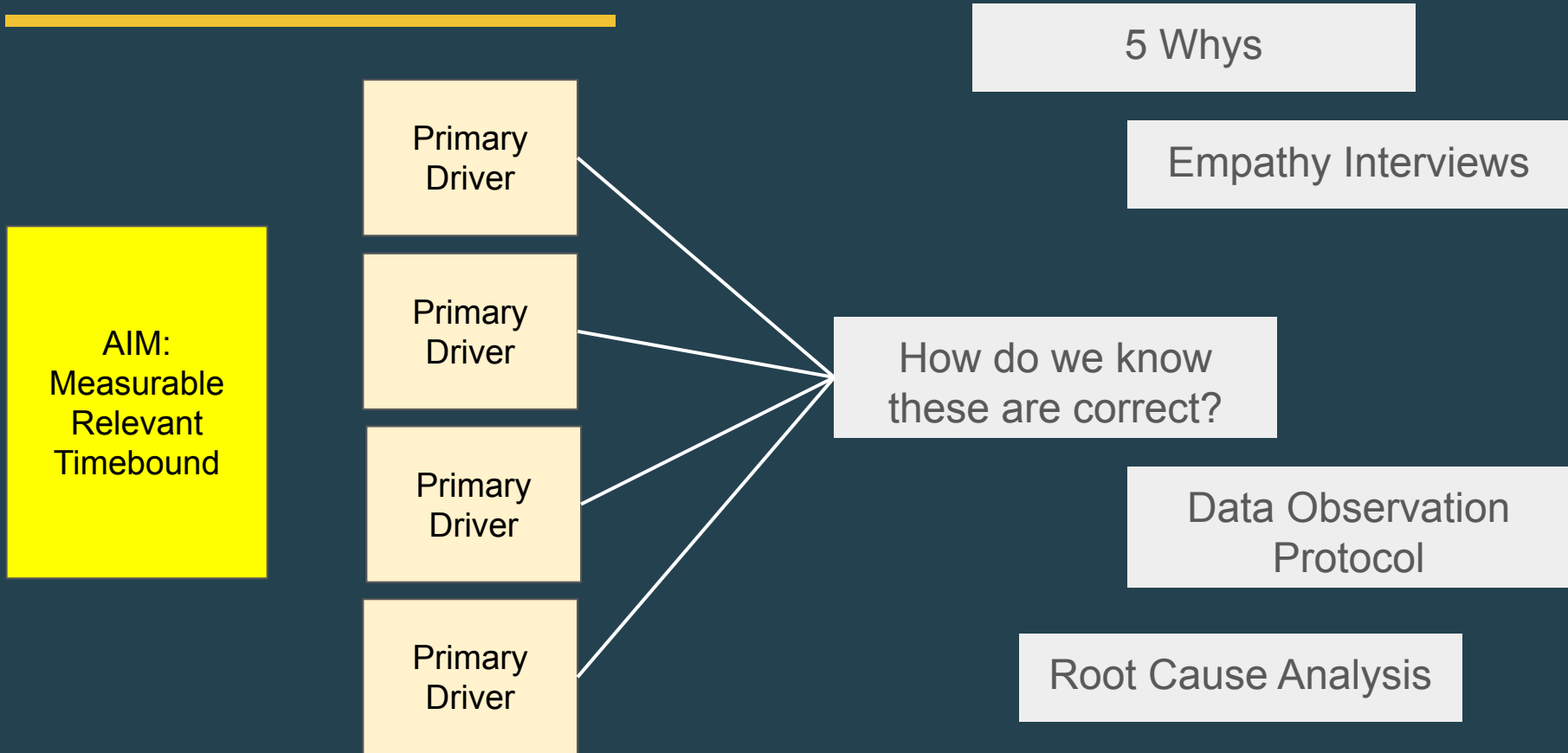
# The Driver Diagram

---



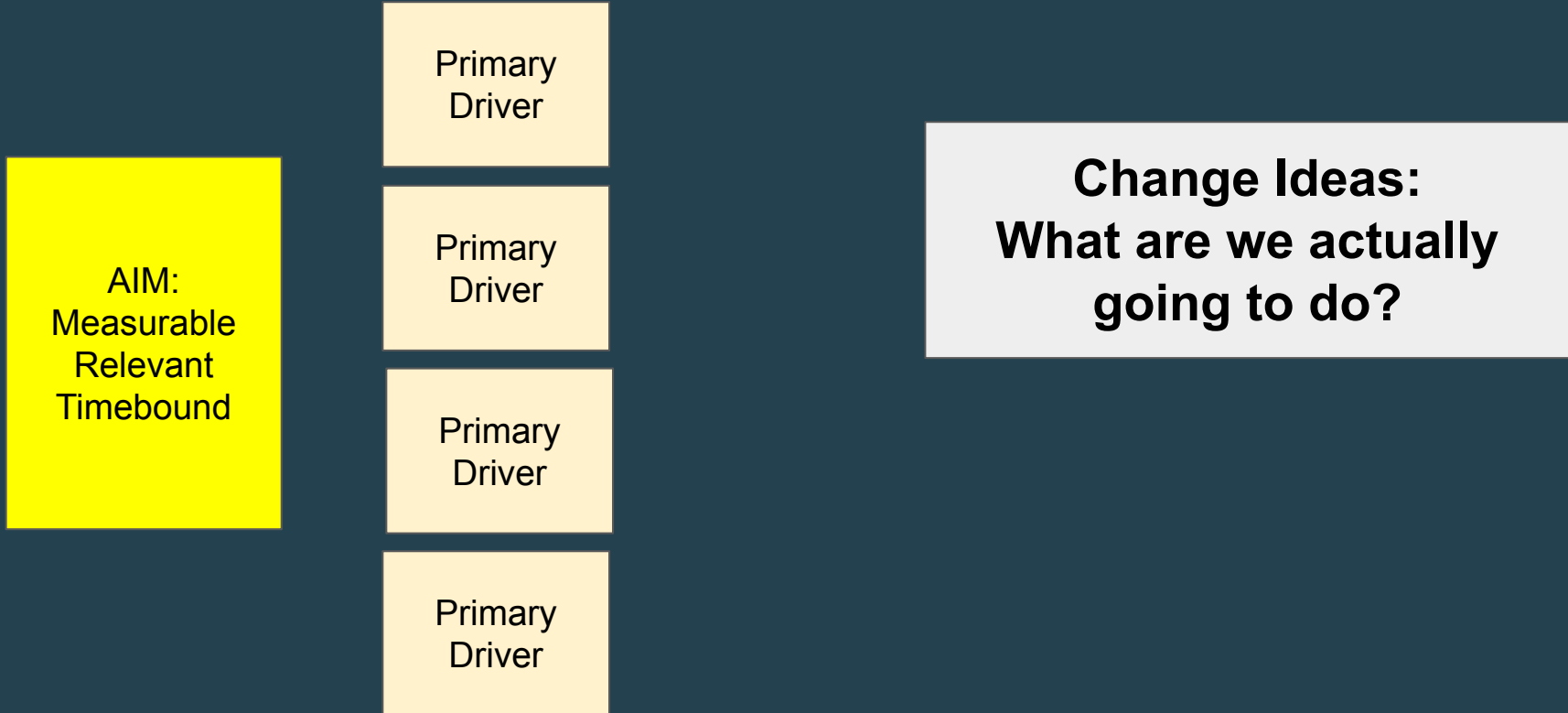
# The Driver Diagram

---



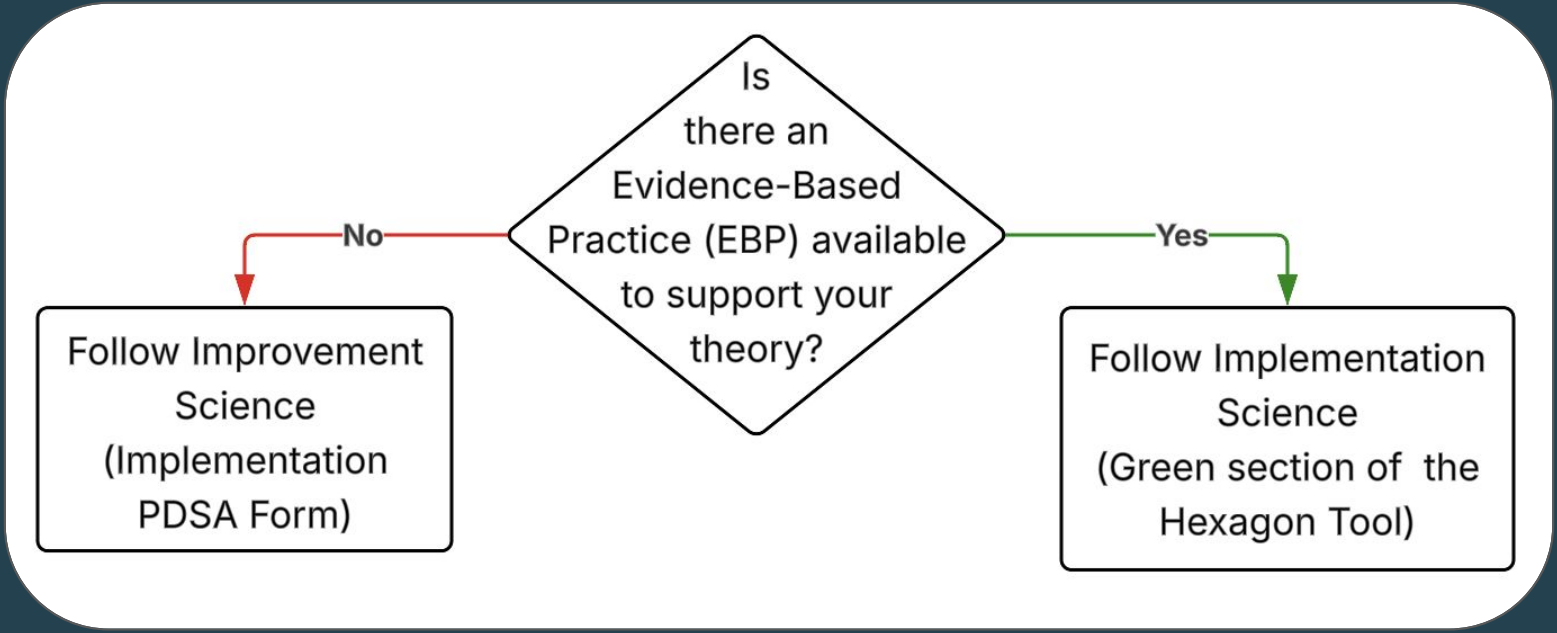
# The Driver Diagram

---



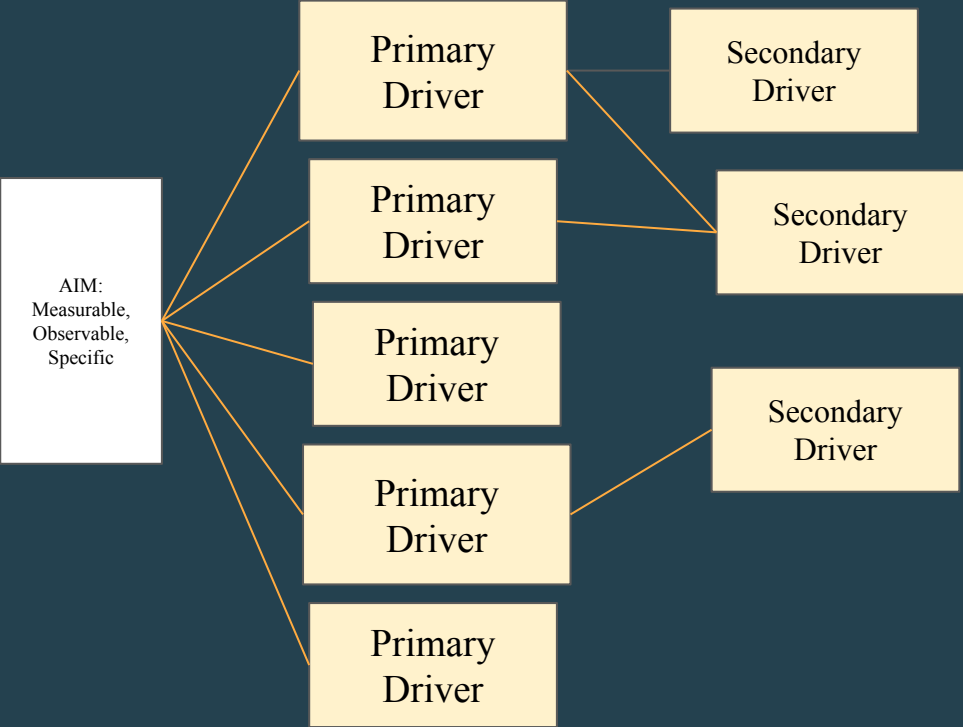
Here is where we run into a lot of problems.

Make the room bigger.

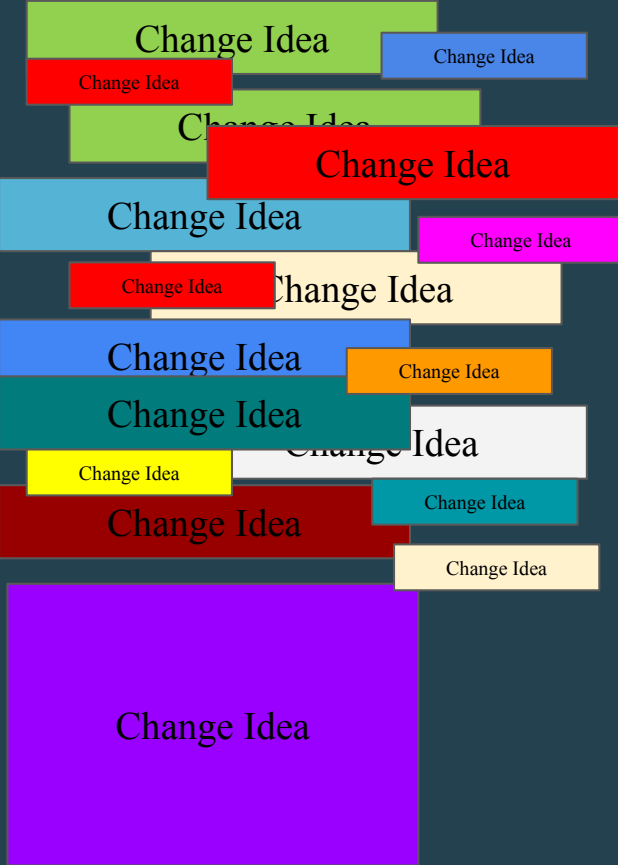


# Driver Diagram

## Phases 1, 2, 3



## Phases 4, 5, 6



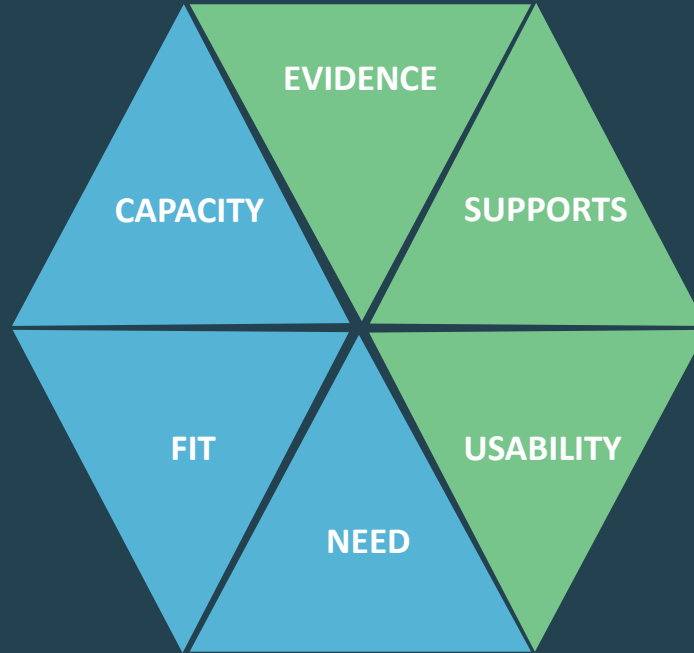
How do we know those ideas will work?

# The Hexagon Tool

---

## IMPLEMENTATION SITE INDICATORS:

- Can we handle this change?
- Is this change targeted to our need, or just a good idea?
- Does this change align with where we are headed and invested?



## PROGRAM INDICATORS:

- Is this a good idea?  
How do we know?
- What would we need to ensure our people are properly equipped to begin?
- What would success look like with this change?

How might we all use this Playbook?

## **You have teams.**

Grade level teams.

Department Chair teams.

Safety teams.

Site Council teams.

PLC teams.

Literacy teams.

Party planning teams.

Compliance teams - CSI, DA, CIM

## **Your team has goals.**

Are they the right goals?

How do you propose to approach them?

How did you calculate your strategy?

What determines a success?

What needs do your people on the ground have to ensure these practices stick?

Where are the gaps in your organization's leadership/training/feedback loops/data acquisition plans keeping you from reaching your goals?

**Improvement and Implementation Science do not  
solve problems by themselves.**

**BUT:**

They provide focus on next steps  
Tools to structure your approach  
Data to remove the guesswork

# Future Plans of this Playbook

The  
**IMPROVEMENT**  
And  
**IMPLEMENTATION**

Playbook **1.5** .... **2.0** .... **2.5** ....



JEREMY SAWTELLE / NICK SYRRIST  
VERSION 1

## COMING SOON - VERSION 1.5

Coaching Facilitation Slides

Team Dashboard / Fidelity Measure

Coaches Dashboard / Fidelity Measure

Coaching Facilitation Guide

The Psychology of Change Addition

Do you have feedback or ideas for us to innovate? Please let us know!

This book lives in a live web link so we can iterate based on feedback. We would love to collaborate with you.

We appreciate you!



JSAWTELLE@SHASTACOE.ORG



NSYRRIST@SHASTACOE.ORG

# Want to Learn More?

---

If you or your team are interested in learning more or receiving a full Improvement/Implementation Science training certification, let us know.



[nsyrrist@shastacoe.org](mailto:nsyrrist@shastacoe.org)  
[jsawtelle@shastacoe.org](mailto:jsawtelle@shastacoe.org)

Questions?

Thank You!