Technical Code-Switching can be a Super-Power

Converting Complex Assessment Data into Approachable (and/or Audience-relevant) Executive Summaries
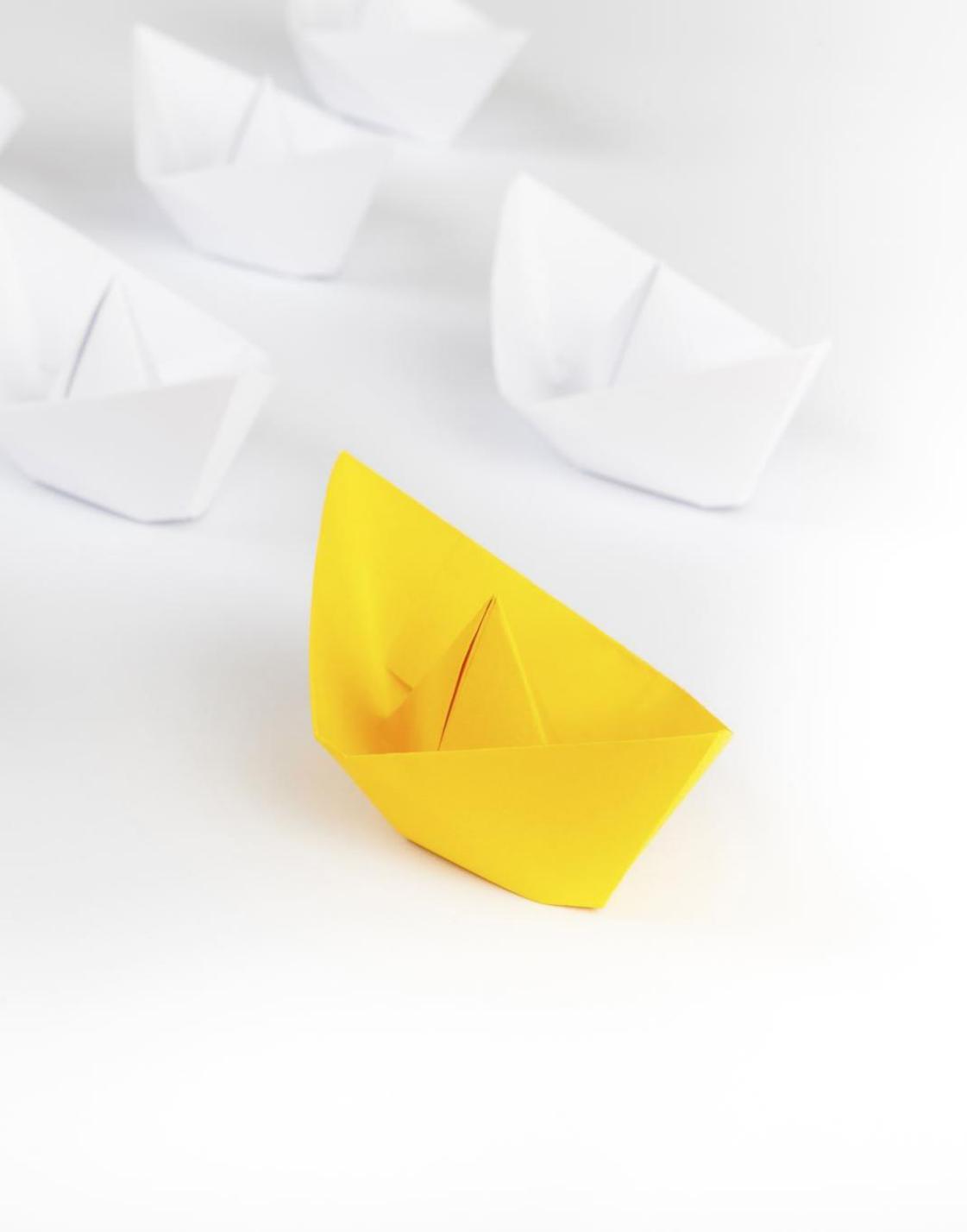
IUPUI Assessment Institute 2023

Tuesday, October 31, 2023

4:00–5:00 p.m.

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Learning Outcomes

1. Describe the concept of code-switching and explain how it is an essential skill in navigating organizational hierarchies and creating impact as an assessment professional.

2. Discuss various assessment reporting strategies including the essential elements necessary for executive-level reporting.

3. Apply various strategies for developing and presenting executive summaries that succinctly outline assessment data for senior administrators.

4. Apply a social-awareness framework that can be used for adapting assessment reporting based on the target audience.

Our Purpose

Code-switching applies to various communication opportunities and can help build strong connections across diverse cultures!

reasons for code switching
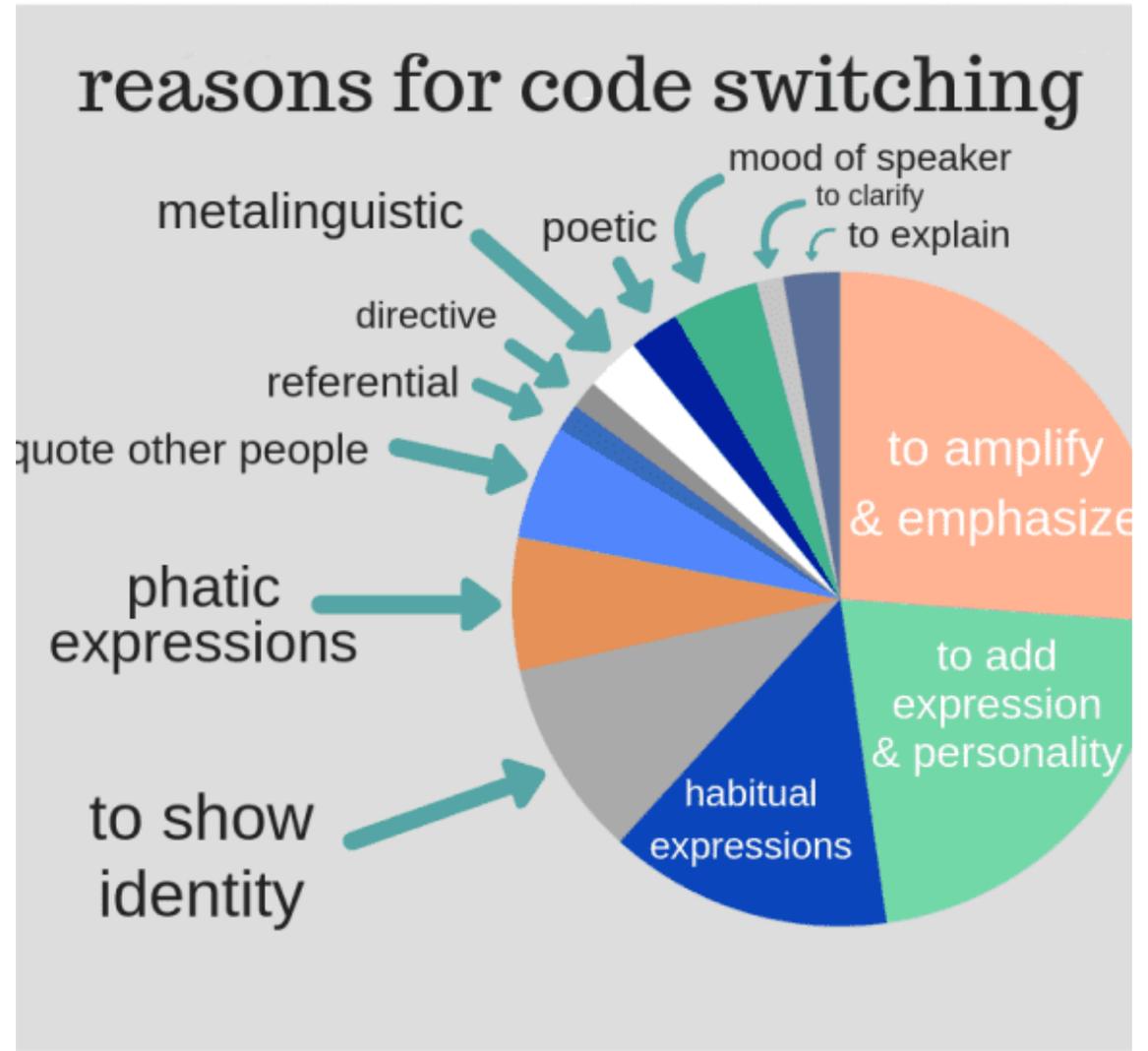
Quick Poll

- What Programs of Study are represented?

- What is the duration of your Program of Study towards degree completion?
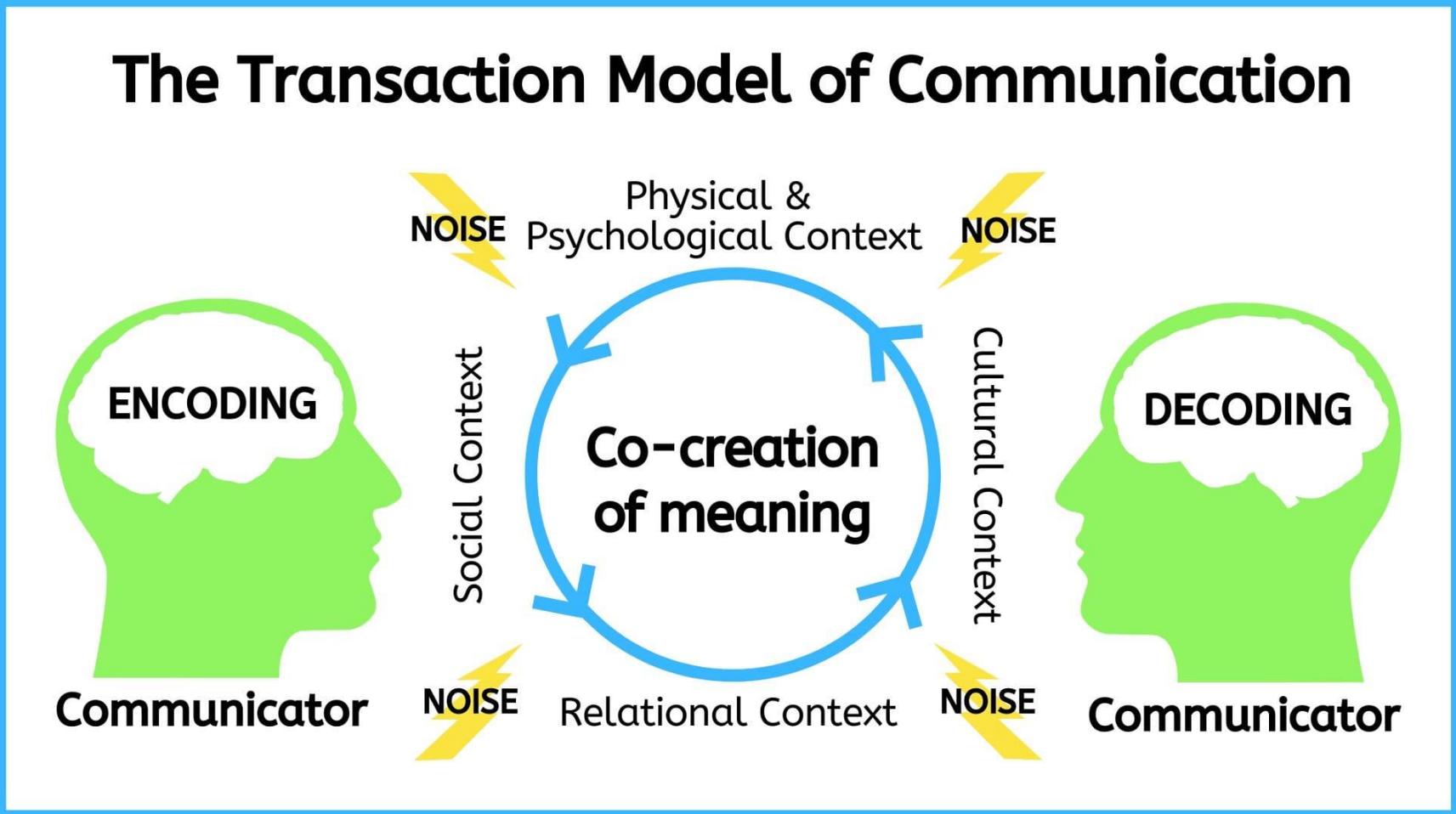
- What is your role?

Assessment Work Defined through Competencies & Attributes

- Data Review

- Pattern Recognition & Forecasting

- Story-telling

- Cultural Interpretation

- Harmonizer

- Alignment-seeker

- Many others…

The Transaction Model of Communication

ENCODING

Communicator

NOISE

Physical & Psychological Context

NOISE

Social Context

Co-creation of meaning

Cultural Context

NOISE

Relational Context

NOISE

DECODING

Communicator

Challenges for Assessment Professionals in Communication

Code Switching

- Code-switching, a term emerging in the 1940-1950s, is changing one's language, presentation, style, and/or behavior during communications.

- Code-switching has recently been highlighted in Diversity, Equity, and Inclusion conversations about how we may adjust communication practices across different groups.

Applying Code Switching to Leadership & Work

- We examine the broader application across different settings:
  - Cross-professional collaboration (e.g., information technology and healthcare)
  - A pharmacist counseling a patient (i.e., using lay terms)
  - Communicating with business partners across different industries (e.g., using common instead of external terminology).

A Tale of Code-Switching in Action

An academic administrator has been asked to provide guiding leadership to three different colleges/schools. This individual's background is in engineering sciences. They must work with a College of Education, School of Physical Therapy, and the School of Social Work for accreditation of several degree programs. Upon entering the situation, the academic administrator mentions developing Gantt charts, creating flow systems, and integrating a RACI into the process. Having experience and expertise in both engineering and assessment, the individual receives feedback that the department heads and deans were overwhelmed by the volume of information presented and felt a disconnect with the process and with how they were typically used to planning a successful accreditation review and visit.

How can a code-switching approach and mindset shift help this situation?

Approaches a Code Switching

- Seek to Understand Your Audience

- Words Matter – Use Language to Your Advantage

- Ensure Data is Contextualized, Immediate, and Relatable

- Know Where Values and Priorities May Clash

Challenges & Pitfalls to Effective Code Switching

- Jargon & Acronyms

- Data Interpretations (Unnecessary Statistical References)

- Rushing to Prepare

- Excessive focus on the "Product" or "Being right"

- Challenges with awareness

- Reliance on organizational hierarchy
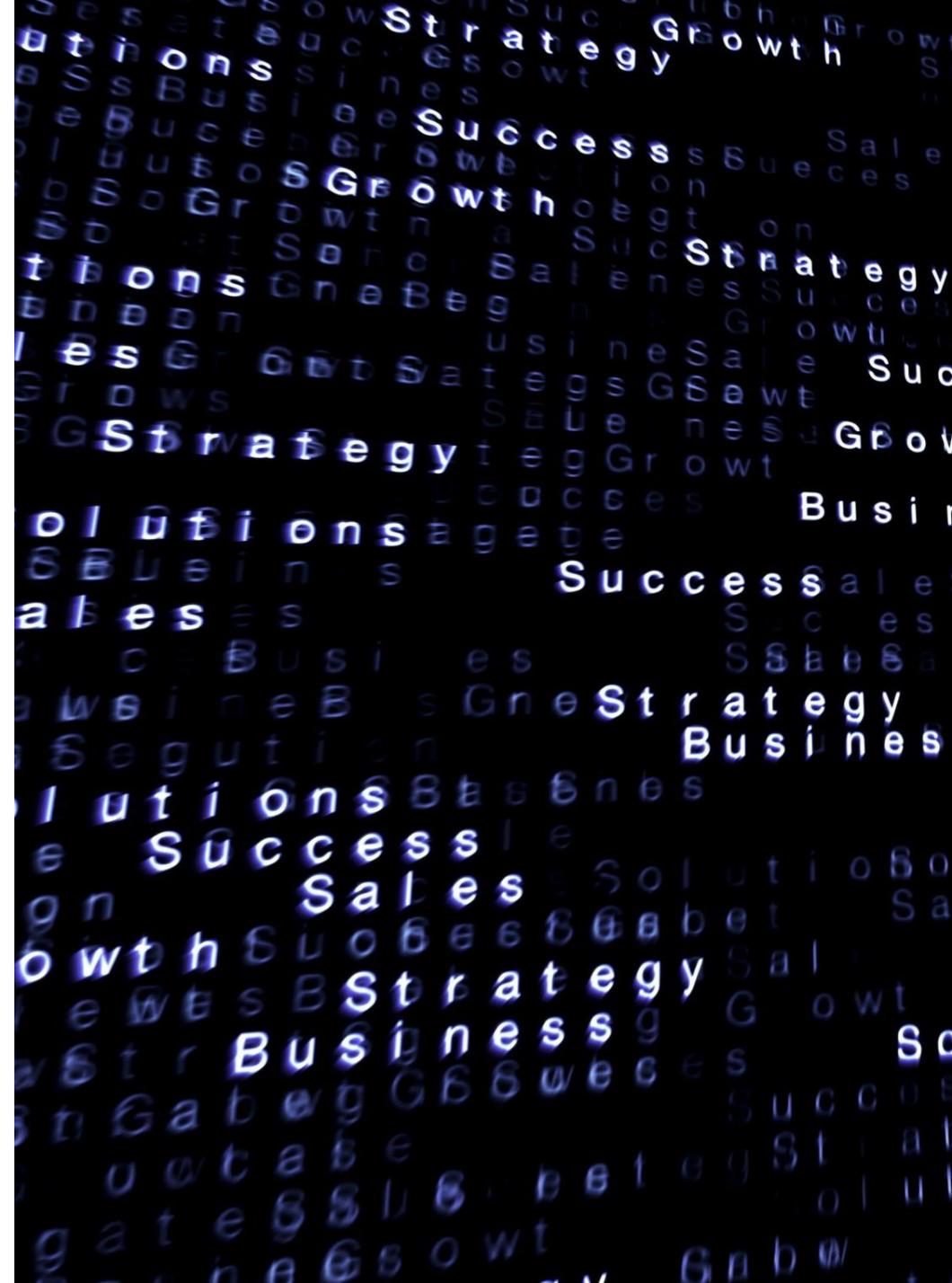
Strategy 1 – Follow Newswriting Guidelines

- Lead with the most important or newsworthy material
  - Must consider the audience first and foremost
  - Can be helpful to make a list of all the important ideas that you need to communicate and rank them for that specific audience
    - Aka "Idea Brain Dump"
  - Only then can you decide on the level of language/jargon that you can employ
- Remaining information given in descending order of importance
- Depending on the audience, your ranking of the most important can, and likely will, change
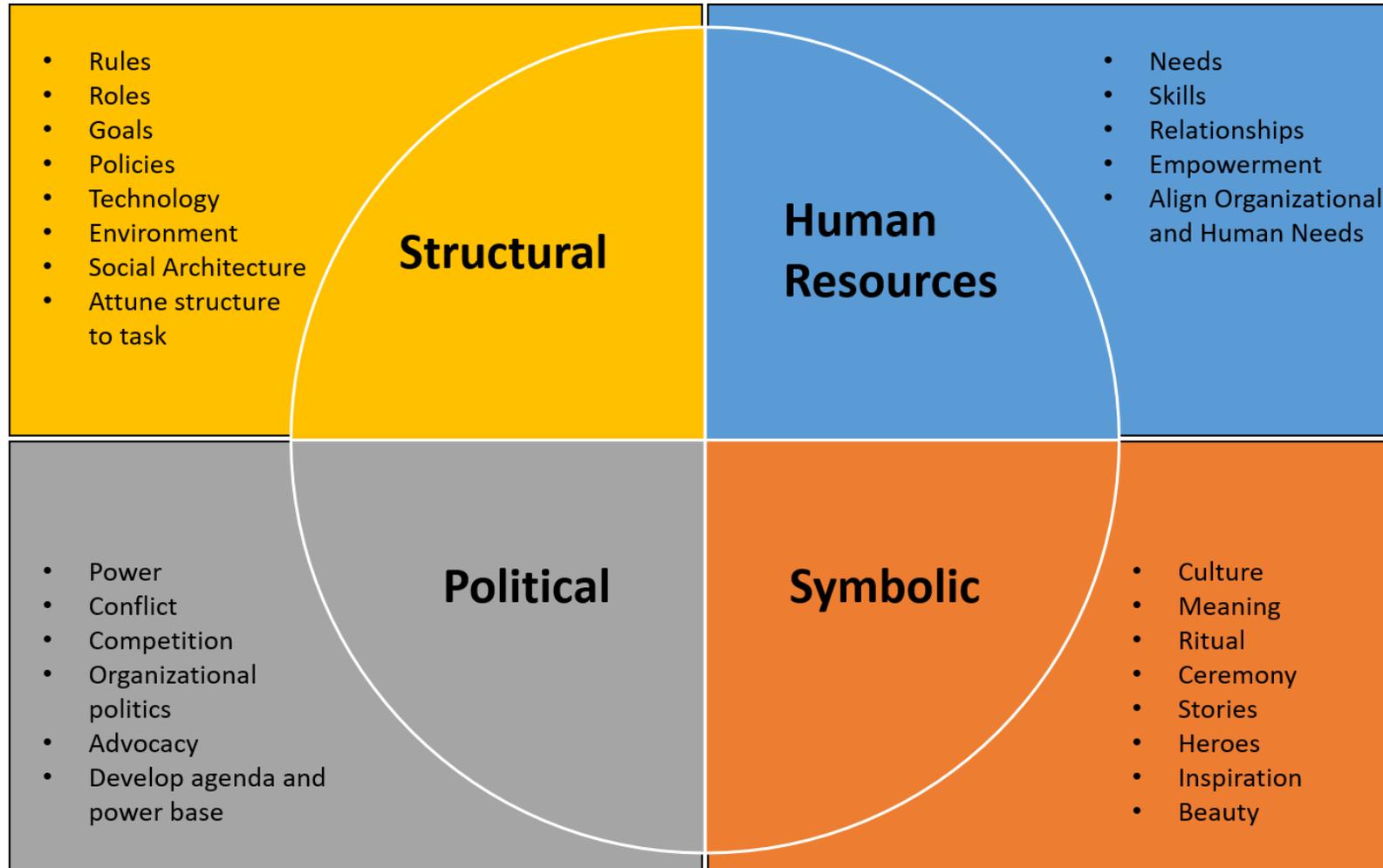
INVERTED PYRAMID WRITING

MOST NEWSWORTHY
Who? What? Where? When? Why?

Include all information that readers MUST know.

IMPORTANT DETAILS
Include additional information that is helpful, but not critical to the story.

GENERAL INFO
Nice, but unnecessary information.

CRUCIAL INFO MUST GO FIRST

THEY CAN STOP READING AT ANY TIME

Strategy 2 – Bolman and Deal's Four Frame Model[1]

| Structural	• This Frame focuses on the obvious 'how' of change. • It's mainly a task-orientated Frame. • It concentrates on strategy; setting measurable goals; clarifying tasks, responsibilities and reporting lines; agreeing on metrics and deadlines, and creating systems and procedures.
Human Resource	• The HR Frame places more emphasis on people's needs. • It chiefly focuses on giving employees the power and opportunity to perform their jobs well, while at the same time, addressing their needs for human contact, personal growth, and job satisfaction.
Political	• The Political Frame addresses the problem of individuals and interest groups having sometimes conflicting (often hidden) agendas, especially at times when budgets are limited and the organisation has to make difficult choices. • In this Frame, you will see coalition-building, conflict resolution work, and power-base building to support the leader's initiatives.
Symbolic	• The Symbolic Frame addresses people's needs for a sense of purpose and meaning in their work. • It focuses on inspiring people by making the organisation's direction feel significant and distinctive. • It includes creating a motivating vision and recognising superb performance through company celebrations.

[1]Bolman, Lee G, and Terrence E Deal. (1991). Reframing Organizations. San Francisco: Jossey-Bass, 1991.

Strategy 2 – Bolman and Deal's Four Frame Model[1]

Structural
- Rules
- Roles
- Goals
- Policies
- Technology
- Environment
- Social Architecture
- Attune structure to task

Human Resources
- Needs
- Skills
- Relationships
- Empowerment
- Align Organizational and Human Needs

Political
- Power
- Conflict
- Competition
- Organizational politics
- Advocacy
- Develop agenda and power base

Symbolic
- Culture
- Meaning
- Ritual
- Ceremony
- Stories
- Heroes
- Inspiration
- Beauty

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Bolman and Deal – Structural Frame
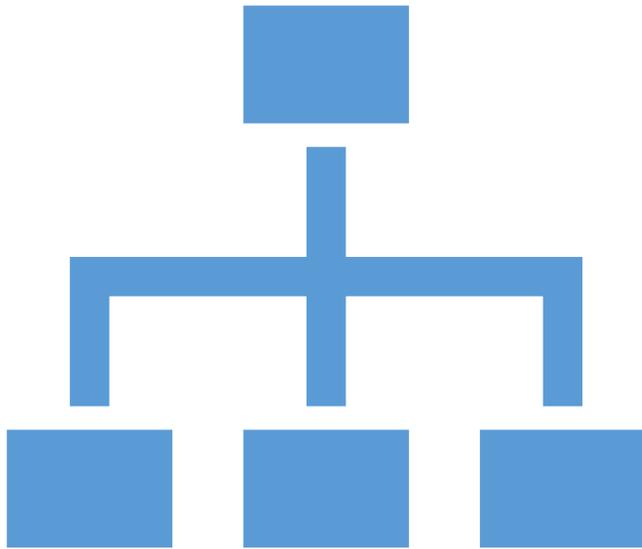
- The "How" – Can be very detailed – Difficult frame to kick off a project

- Can be perceived as very direct and dictatorial if not executed correctly
  - Tends to be a task-oriented frame

- Communication of structural frame is best when open-ended
  - Instead of declaring 'this is how we are going to do it,' it is often better to focus and communicate the overall strategy and guide the discussion of the how with stakeholder participation

Bolman and Deal – Structural Frame
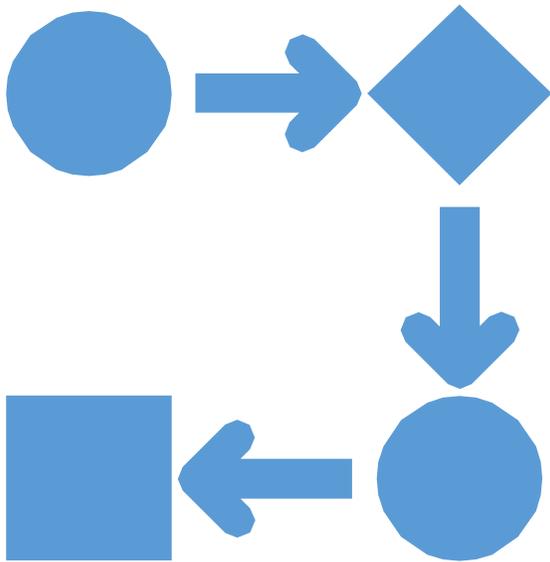
- Ultimately, you want the structural strategies developed to promote a full understanding of the processes required for assessment information to be gathered/shared, the cascading communications pathway, the sequencing of communication plans, and the ultimate use of the assessment results.

- You have to be an architect or analyst leader
  - Structure to the idea/work

Bolman and Deal – Human Resource Frame
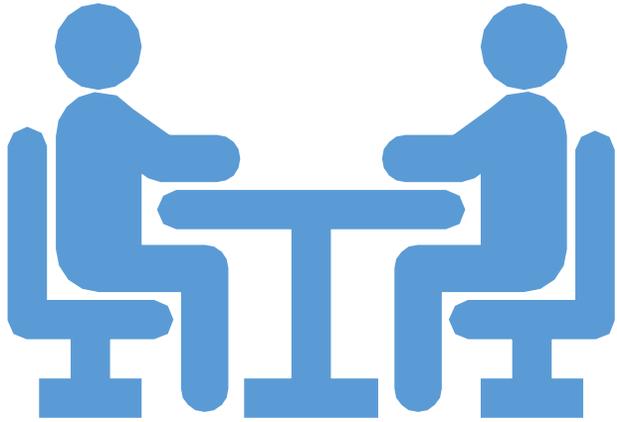
- Highly relational approach may require assessment professionals to have close communication with members of their audiences and stakeholders to establish expectations early and revisit them often through feedback and debriefing.

- Often effective if commitment to the vision is an identified problem

- You have to be a coach or servant leader
  - Catalyst for the idea/work
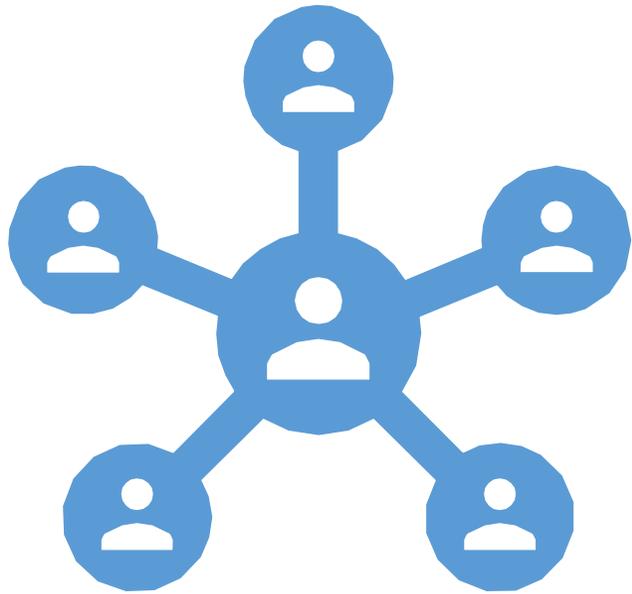
Bolman and Deal – Political Frame

- Political considerations include understanding stakeholder and audience connections and hot-button issues to ensure buy-in and engagement with ideas related to the program's continuous improvement.

- All about buy-in
  - Hidden agendas
  - Conflicting units/departments
  - Difficult financial considerations

- You have to be a negotiator or a warrior leader
  - Establish agenda and power base for the idea/work

Bolman and Deal – Symbolic Frame

- Symbolic approaches can be used as assessment professionals learn about the organizational culture and establish metrics that matter to the success of the organization and highlight its mission fulfillment.

Other Strategies/Approach Frameworks

- Tufte's Principles of Information Design: Edward Tufte, a pioneer in the field of data visualization, has developed principles for presenting information in a clear and effective way.

- Kotter's 8-Step Change Model: This model can be used to communicate complex change initiatives by breaking them down into eight manageable steps.

- Heath and Heath's SUCCESs Model: This model, from the book "Made to Stick" by Chip and Dan Heath, outlines six principles (Simple, Unexpected, Concrete, Credible, Emotional, Stories) for making ideas "stick" in the minds of an audience.

- Fogg's Behavior Model: This model by B.J. Fogg focuses on how to change behavior and can be applied to communicate complex ideas in a way that leads to action.

- The Lasswell Communication Model: Harold Lasswell's model describes a communication act in terms of who says what to whom in what channel with what effect. It can be used to analyze and plan strategic communications.

- The Pyramid Principle by Barbara Minto: This principle is used in management consulting to structure thinking and communication. It advocates that ideas be presented in a pyramid structure, starting with the main idea, followed by supporting arguments.

- Knowles' Adult Learning Theory: Malcolm Knowles' theory on adult learning (Andragogy) emphasizes the importance of experience and the need for relevance, which can be applied to make complex information more approachable for adult learners.

- Gardner's Theory of Multiple Intelligences: Howard Gardner's theory recognizes different types of intelligence and can be used to tailor communication to different learning styles

Communication Techniques

|			
Executive Summary	**Ordering**	Leveling	Simplification
Visualization with **charts, graphs,** etc.	Storytelling	Analogies **and Metaphors**	**Tailoring to the Audience**
Chunking	**Plain Language**	**Interactive Communication**	**Highlighting Key Takeaways**
Incorporating Feedback as you go	**Multimedia**	**Emphasizing** Relevance	Iterative Communication

Double Check Your Approach

- ❑ Right Audience
  - ❑ 10,000 foot vs. Boots on the Ground
    - ❑ Scope of Influence/Control
- ❑ Importance of Initiative
- ❑ Purpose/Mission
- ❑ Stage of Project
- ❑ Acronyms are defined
- ❑ Calculations are clear
- ❑ Depth
- ❑ Time vs. Volume of Info
- ❑ Images Add Value
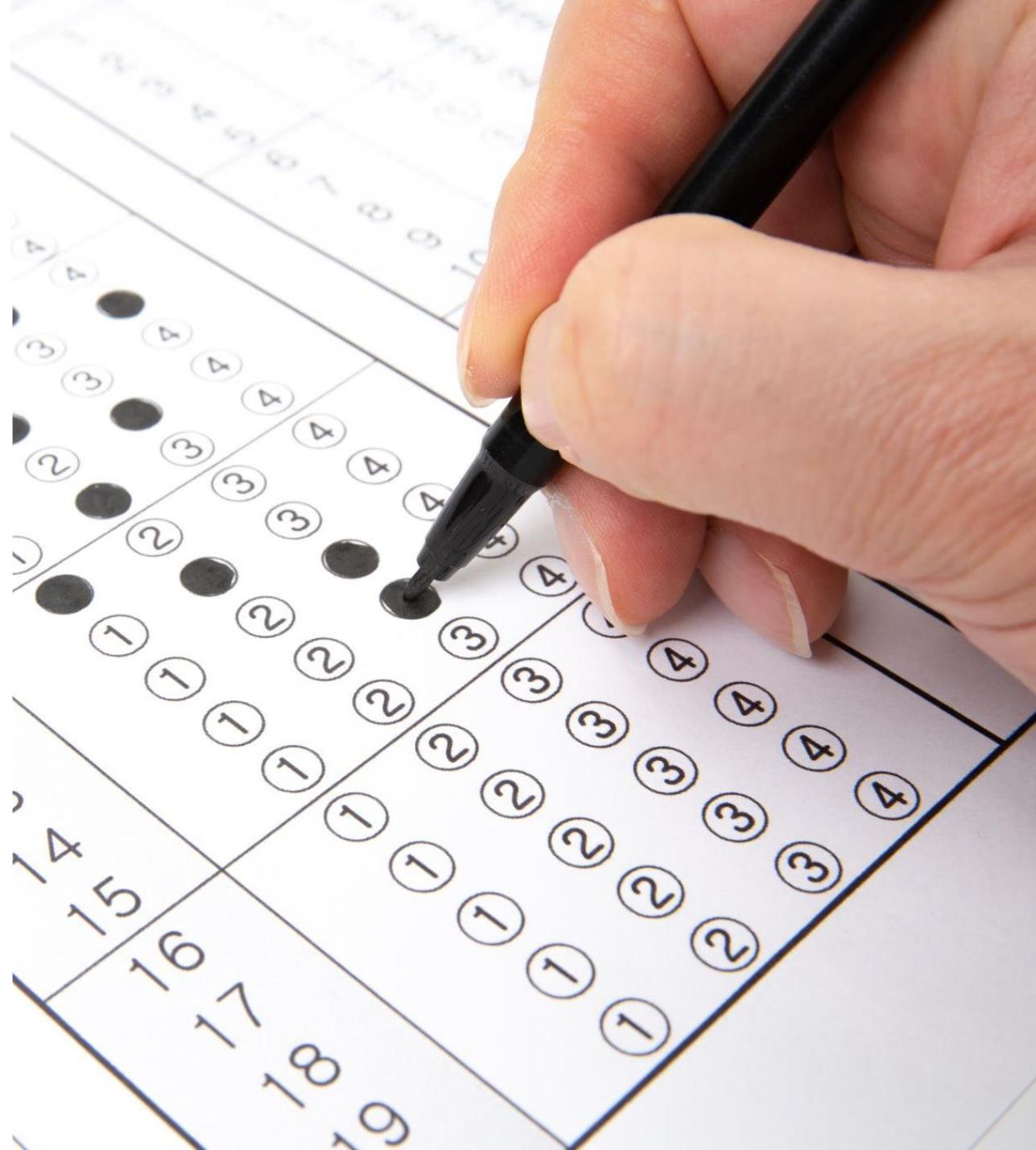
Technical Expertise
isn't always a requirement

- The broader the scope of the portfolio the less technical expertise

- Administrators
  - President < Provost < Dean < Department Chair

- Accreditors
  - Broad Understanding of field
  - Likely technical experts in one area

- Communicate at a level for the whole audience
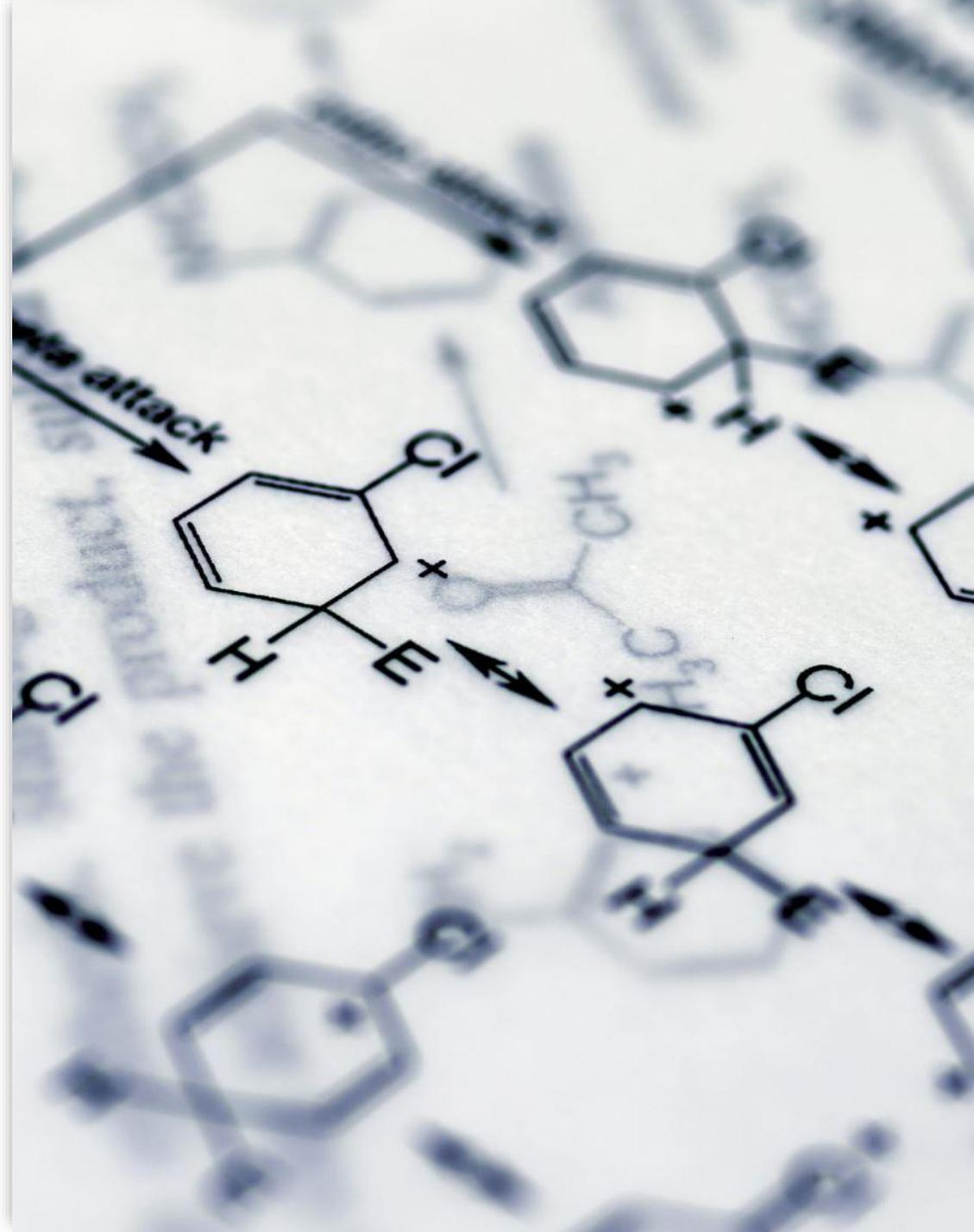
Effective Code Switching – Case Activity

A seasoned academic administrator has been tasked to work with the College of Business (CoB) and support their dean in project management for a program review. Their educational background is as a pharmacist and a medicinal chemist, having earned a PharmD and then a PhD. They have experience working with accreditation and compliance in academia. However, they have never worked with a CoB. They are scheduled to have the first meeting with the CoB leadership soon and, other than pulling the latest accreditation standards for the program, they are unsure about next steps for further preparation.

What might be helpful for this leader?

Steps to A Successful Meeting – And A Great Report!

- Meeting preparation
  - Read documents used in the specific unit / college / department
  - Highlight specific phrases and words as part of the culture's language
  - Listen carefully to the needs of the team and adopt their words and descriptors
  - Clarify jargon they use and leverage it as "insider" language
  - Make every effort to present the work in the language of that specific team and the accreditation audience

- Report Preparation
  - Become the expert in the format
  - Create future meetings to discuss interpretation of the standards and compliance areas
  - Write all language to the most general language and let the team add in the technical components
  - Lead the report development from the "side" rather than wanting to be the leader – offer to help with providing an "outsider's review"