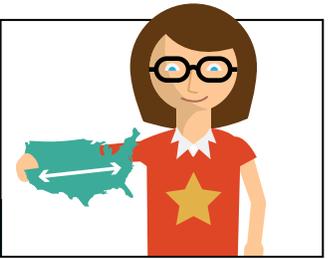


# REDESIGNING SCHOOLS

TO REACH EVERY STUDENT WITH EXCELLENT TEACHERS

CHANGE MANAGEMENT: KEY THEORIES TO CONSIDER WHEN EXTENDING REACH



## INTRODUCTION

**C**hange is hard. Not just mentally—learning new skills, steps, and technologies—but emotionally. But no matter how difficult, change is common in all sectors today, because globalization and the rapid development of new technologies keep moving the bar for quality, cost, speed, and service.

As schools, their teachers, and outside facilitators redesign jobs and incorporate technology to extend the reach of excellent teachers to more students and develop an Opportunity Culture for all, choosing the right school models is just one part of the task. The human experience—and experience in education—tells us that even perfect design will not work if teachers do not grasp it, embrace it, and contribute to its success.

Understanding the key theories of organization change management can help schools working in different contexts make changes successfully, for students and teachers.

Change management is just what it sounds like: the process of planning and executing major change steps in an organization to achieve the organization’s goals, maximize the positive impact on employees who do the work after a change, and help leaders and staff make the new ways become a habit.

Theories of change management abound. This brief summarizes the key elements of eight major strands:

- \* Job Redesign
- \* Disruptive Change
- \* Good to Great
- \* Total Quality Management
- \* Learning Organizations
- \* Reengineering / Business Process Redesign
- \* Turnarounds
- \* General Change Management

## JOB REDESIGN

The ideas of how to redesign jobs are woven throughout the theories of change management. John Slocum reviewed the literature about job redesign and wrote an overview of how to implement a redesign.

### How do you do it?

- \* **Tackle the hardest parts early.** Those planning job redesign should not sell the idea first and then get to work planning it. Instead, detail what’s going to happen and how success will be measured, and develop methods for feedback from organization leadership as the redesign progresses.
- \* **Diagnose the job before changing it.** Will it have a major and meaningful effect on the person holding the job, enough to

justify the change? What parts of the job are so problematic that they need changing? Are the employees ready for and capable of handling the change? Managers especially need to spell out “bread-and-butter issues”—pay, working conditions, supervision, and company policies and practices.

- \* **Make changes explicitly and publicly** on the basis of that job diagnosis.
- \* **Plan ahead for inevitable problems and opportunities** that arise from the redesign, to keep those problems from draining the management’s energy and derailing the redesign.
- \* **Evaluate, try again, and re-evaluate.** Throughout the design and implementation phases, redesign planners must know they will have to learn as they go.

Leaders rarely evaluate the job before redesigning it, to be sure it needs redesigning, and to understand what parts may be as effective/efficient as they're going to get and what jobs are already too complex. They also may lack the drive to make the necessary changes. Job redesign too often just adds a few tasks, rather than making significant changes.

And, Slocum said, planners are too often surprised by the unexpected consequences of the redesign. Managers don't get the supervisory training needed to implement the redesign adequately and evenly across the organization. And they too often assume that job "enrichment" appeals to *all* employees. Many, though, may feel less of a need for professional development and may feel threatened and pushed too far by the changes.

## DISRUPTIVE CHANGE

This is change that happens quickly and unexpectedly and most often is driven by organizations other than those that currently dominate a sector. Disruptive innovations create an entirely new market or business model through the introduction of a new kind of product or service—one that's actually worse, initially, according to customer response, but meets an unmet need or helps customers who have been left out.

Clayton Christensen, who began writing about disruptive innovations in 1995, draws a distinction between sustaining innovations—products or services that meet the demands of current customers in established markets—and disruptive innovations. He points to early personal computers as disruptive; they weren't what leading customers in existing markets needed, and, at first, they seemed worse, because they didn't have the power to run existing computer applications. But what they did offer enabled the rapid creation of new market applications, eventually satisfying not only the new market but those old, existing customers as well. In the book *Disrupting Class*, Christensen and coauthors Michael B. Horn and Curtis W. Johnson also have applied their thinking to predicting how disruption will change education.

### How do you do it?

Managers must first identify their organization's resources, processes, and values to understand its capacity to change. "Resources" includes people, equipment, and money, plus product designs, information, and relationships. "Processes" means the formal rules and informal routines, or patterns of work—communication, decision making—that turn resources into products and services. These habits may be the major stumbling block in dealing with disruptive change. "Values" means how employees set priorities, enabling them to judge what matters, be it a new idea or a customer. Consistent, widely understood values provide a useful test of good management, but also tell what an organization cannot do (such

as be willing to accept lower profit margins, or sacrifice quality for cost-effectiveness).

Then, leaders facing change must:

- \* **Decide whether they have the resources needed.**
- \* **Decide whether the organization has the processes and values to succeed.** Look not at whether they have worked well in the past. Look at whether what has made the organization successful previously will work with the desired changes—are the processes appropriate? Are the values going to ensure the needed focus and priority for the change?

Christensen points out the importance of processes and the change they can hinder. When a strong culture rooted in powerful processes and values has made a company successful, disruptive innovators may not have the space they need to attempt something truly new. Start-ups often succeed in emerging markets because, although they may lack resources, they are less inhibited by all the change-process steps that a larger, established company must go through to try something new.

So how can a large organization emulate a start-up in producing disruptive innovation? Organization leaders can consider these tactics:

- \* **Creating a new structure within the organization** to develop new processes—forming a respected, "heavyweight team" dedicated to this new challenge;
- \* **Creating an independent organization** to develop new processes and values—giving it independence from normal decision-making processes about resource allocations, with the full support of the original company's top leader (and *keep* it independent; the authors see this as the best solution to dealing with disruptive technologies, and do not see it working well to bring this group back into the original organization once it succeeds); or
- \* **Acquiring another organization** whose processes and values provide those needed for the change.

Accepting that old ways—and entire businesses—will and must die as part of the cycle of organization life is a core theme for Christensen. No matter the industry, he said, the needs and opportunities continue to change. An organization's units therefore have finite life spans, and disruptive technologies are part of that cycle. Companies that understand this can create new organizations to replace the ones that will die, rather than leaving new opportunities to outsiders. Doing so means letting those who manage the disruptive innovation lead with independence, and power even to replace the original organization's work.

In education, Christensen, Horn, and Johnson predict that computer-based learning, done right, can help schools make learning

become an intrinsically motivating experience in ways it has not been so far, customized for each student. For all that schools have spent on computers, the authors note, they have largely tried to squeeze the new technology into existing structures and teaching methods, rather than allowing this disruptive technology to create a new model that would change how schools operate. That new model will begin to take shape when schools implement computer-based learning in cases where the only alternative to taking a class from the computer is nothing at all—so nothing competes with this option. This computer-based learning disrupts the standard mode of teacher-led instruction. From that first step, the disruptions will occur in the creation of the “student-centric” learning tools needed (think software that acts like a personal tutor), and this will need to happen largely outside of the traditional K–12 system (for example, user-generated software), until enough demand exists for schools to incorporate them.

### GOOD TO GREAT

Author Jim Collins took a close look at the common qualities of good companies that made the leap to sustained greatness. Arguing that “good is the enemy of great,” he identified three stages his great companies went through, with two key concepts in each stage. Although he studied corporations, he pointed out: “That good is the enemy of great is not just a business problem. It is a *human* problem. If we have cracked the code on the question of good to great, we should have something of value to any type of organization. Good schools might become great schools.”

#### How do you do it?

Collins puts his concepts into three stages, beginning with staffing:

1. **Disciplined people:** Under this stage, as companies begin the buildup to breaking through to greatness, Collins offers these concepts:
  - i. **Level 5 leadership:** These companies begin with having “level 5” leaders, who are the opposite of what most people expect. They come across as humble and self-effacing, but have an iron will and unwavering determination to steer their organizations to greatness. High-profile, big-personality leaders—the ones we would expect to effect a transformation—actually proved detrimental in the companies Collins used for comparison, which achieved, but did not sustain, greatness.
  - ii. **First who . . . then what:** These level 5 leaders don’t set a vision and strategy first. Instead, they devote much time to getting the right people on board and in the right jobs, and only then figure out what direction the organization should take. The *right* people make the difference for long-term success.

2. **Disciplined thought:** It is during this stage that companies begin a sharp climb to greatness, with these concepts:
  - i. **Confront the brutal facts (yet never lose faith):** The leaders must fully believe they will succeed despite the obstacles, but it can’t be a blind faith. They must have the discipline to look hard at the reality of their situation, creating a culture in which people feel free to tell the truth. He notes that if the right people have been hired, leaders will not need to spend much time motivating them—but one of the best ways to “de-motivate” them is to ignore the brutal facts of reality.
  - ii. **The hedgehog concept:** This is about “transcending the curse of competence.” If you’re good, but not the best, at your core business, then the core business cannot be the basis for becoming a great company. “Hedgehogs” here mean those who take complex challenges and simplify them, and focus—a quality of these level 5 leaders. Figuring out what an organization can be best at and most passionate about, for the best economic results, leads to greatness.
3. **Disciplined action:**
  - i. **A culture of discipline:** Start with an entrepreneurial ethic and combine it with disciplined people, thought, and action, to get superior performance and sustained greatness. Within the framework of disciplined people (who reduce a need for hierarchy), disciplined thought (which reduces a need for bureaucracy), and disciplined action (which reduces a need for excessive controls), employees have the freedom to do what it takes to find success.
  - ii. **Technology accelerators:** Technology by itself was not a root cause of greatness for these organizations—but carefully selected and used technologies did set them apart.

Finally, Collins points out that in none of his studies was there one obvious transformation moment or dramatic change program—these organizations just kept pushing and building momentum until the point of breakthrough (and beyond).

### TOTAL QUALITY MANAGEMENT/ CONTINUOUS IMPROVEMENT

Total quality management (TQM), and its offshoot, continuous improvement, are systems intended to continuously improve quality and customer satisfaction by having every employee committed to maintaining high standards across all the organization’s operations. TQM became popular in the 1980s, originally mainly in manufacturing. It calls for all employees to participate in efforts to improve processes, products, and services. TQM follows W. Edwards Deming’s 14 points for management, formulated after he studied Japanese car companies in the 1950s and intended to

transform American industry. Productivity follows quality (by doing it right the first time), rather than productivity being pitted against quality.

### How do you do it?

Deming's 14 points apply to anything from large companies to a small division and emphasize continuous improvement and constant innovation, with a commitment to the resources needed to support that. The points include such directives as: "create constancy of purpose for improvement of product and service" (focus on the long run), "constantly and forever improve the system of production and service," "drive out fear," "break down barriers between departments," and "institute a vigorous program of education and training." Deming's major themes included these: Employees needed clear standards and tools to achieve results, in a climate of cooperation free of blame and fear. He also thought organizations must break down barriers between supervisors and their employees. To improve processes, he said, organizations also must remove the common causes of problems, such as poor product design or working conditions, and special (individual) causes, such as an employee's lack of knowledge. Finally, the use of statistical analysis to determine what variations in the quality of outcomes were acceptable empowered employees to know when to take action.

Others in addition to Deming contributed to the development of the TQM concept. Joseph Juran focused on a cost-of-quality analysis, to determine when improvements to quality had gone far enough. Philip Crosby also focused on costs, with a quality improvement goal of "zero defects" (a concept that came out of the company that built Pershing missiles, which needed to be flawless). Crosby also focused on how top management implemented expectations, and thus motivation, throughout a company. David Garvin proposed that leaders needed to look more at how high quality means pleasing customers, not just protecting them from annoyances. He saw eight categories of quality that organization leaders needed to consider to make organizations successful: performance, features, reliability, conformance, durability, serviceability, aesthetics, and perceived quality—all of which required understanding consumers' needs and preferences, rather than just controlling the production process.

## LEARNING ORGANIZATIONS

A learning organization is a group of people who are continually learning what they need, to create what they want to create. Learning organizations nurture new ways of thinking and encourage working in teams. Peter Senge pioneered the concept of learning organizations in 1990, following on the heels of the total quality management push.

### How do you do it?

Senge wrote specifically about his ideas for schools. He said the collective learning of a learning organization does not happen in most schools among teachers, principals, and district administrators. He advocated for ongoing, on-the-job learning (not going away to conferences) and applying to teachers and staff the cooperative learning that schools advocate for students. He wrote that creating a learning organization, in the context of schools, can begin by:

- \* **Helping employees work as part of a system:** Take away the fragmented, "one teacher behind a closed door" current way of working and create an environment in which teams understand the whole system, and in which innovations can occur and stick.
- \* **Giving employees power:** Organizations with a low ability to learn have people at all levels feeling they lack power to make a difference.
- \* **Creating a safe environment for innovation and change:** Superintendents must find and support principals who will create a learning environment for innovative teachers. This included allowing principals to hire teachers with passion and commitment and giving them the space—and like-minded colleagues—to challenge the status quo. Bringing these people together allows individual visions to interact, creating a "field of shared meaning" that includes deep levels of trust and understanding, to build a shared vision.
- \* **Building a shared vision that creates change on multiple levels:** Find and support teachers committed to innovation; create the necessary environment within the school, the school system, and the community. Schools with significant, lasting innovations have come out of multiple groups working together—for example, a few committed teachers working with a strong principal whose views align with the superintendent's views, all in concert with involved community members.
- \* **Coordinating efforts:** Significant change requires coordinated efforts throughout a school or district.
- \* **Providing time for change to take hold:** Building a shared vision isn't about writing a vision statement. It's a process, not an event. Over time, a learning process changes people's beliefs and views, and their skills and capabilities.

## REENGINEERING/BUSINESS PROCESS REDESIGN

Instead of taking current processes and trying simply to speed them up, this calls for radically redesigning organization processes and roles, often using information technology, to dramatically

improve performance. It relies on recognizing and breaking free from the existing “rules” and assumptions of how things should be done. In 1990, Michael Hammer pointed to the experience at Ford in reengineering its accounts payable processes, after realizing that its initial and seemingly dramatic plan to cut 20 percent of its workers—down to a 400-person department—could not compete with Mazda, whose department had all of five workers. By instituting a completely new process, Ford reduced its employees not by 20 percent, but by 75 percent. Most important, the organization gained more control and accuracy in its finances. Although reengineering can be attacked as “a euphemism for mindless downsizing,” Hammer said, it has improved the remaining employees’ jobs, giving them more authority and better understanding of how their work fits into their organizations’ operations.

### How do you do it?

“At the heart of reengineering is the notion of discontinuous thinking—of recognizing and breaking away from the outdated rules and fundamental assumptions that underlie operations,” Hammer said. To begin, examine an existing process with all those involved. For example, assemble a team with representatives from all the units involved in the process being reengineered and all those that depend on the process. Consider what steps in the process have value, and look for new ways to get the desired result. Ask “why and what if?” Then focus on these principles:

- \* **Organize jobs around outcomes, not tasks**—design a job around an outcome, instead of a single task; have this jobholder perform all the steps in a process to reach that objective.
- \* **Have those who use the outcome of the process perform the process.** For example, instead of making one department turn to a purchasing department for all the little things it needs, allow them to make their own purchases through databases—reducing the need for someone to manage every process separately.
- \* **Computerize as much as you can.** Examples include:
  - process the information you produce, rather than sending it elsewhere to be processed;
  - treat geographically dispersed resources as though they were centralized;
  - use shared databases and communications networks to coordinate parallel functions in process, rather than after completion; capture information once and at the source.
- \* **Set up your processes so those doing the work make the decisions,** with built-in controls. Allowing this self-management takes away the slowness and bureaucracy of hierarchical management.

- \* **Think big:** Changing a process should trigger changes within job design, career paths, recruiting and training, organizational structures, and management.

Finally, reengineering cannot succeed without top leadership with real vision and staying power, to avoid the “flavor of the month” reorganizations.

### TURNAROUNDS

Turnaround efforts are used in chronically failing organizations to make a dramatic comeback. A look at turnarounds in a variety of organizations—from nonprofits to health care to government agencies to industry—produced surprisingly consistent findings in what created success as well as what environments led to the need for major change. Many of the steps to success noted here echo those of Kotter’s general change management theories described in the next section. These actions were notable not just for taking a dismally functioning organization and making it somewhat better; the turnarounds rapidly took organizations from “worst to first.” Turnarounds require a strong leader who can drive change and win the support of all involved, and within that supportive environment, that leader needs “the big yes” from the board or other hirers to make dramatic changes.

### How do you do it?

- \* **Focus on a few early wins:** Successful turnaround leaders choose a few high-priority but limited-scope goals with visible payoffs, and use that early success to gain momentum.
- \* **Break organization norms:** In a failing organization, existing practices contribute to failure. Successful turnaround leaders break rules and norms. Deviating to achieve early wins shows that new action gets new results.
- \* **Push rapid-fire experimentation:** Turnaround leaders press a fast cycle of trying new tactics, discarding failed tactics, and investing more in what works. They resist touting mere progress as ultimate success.
- \* **Get the right staff, right the remainder:** Successful turnaround leaders typically do not replace all or even most staff at the start, but they often replace some key leaders who help organize and drive change. For remaining staff, change is mandatory, not optional.
- \* **Drive decisions with open-air data:** Successful turnaround leaders are focused, fearless data hounds. They choose their initial goals based on rigorous analysis, and report staff results visibly and often. For schools, the keys are using the right data to drive change and requiring all relevant staff to put their data on display in an open-air forum and then face tough questions (and helpful problem solving). The process

helps people improve their practice, but it also transforms the culture.

- \* **Lead a turnaround campaign:** Successful turnaround leaders know that change of any kind is hard, and people resist it for many reasons unrelated to success. Leaders use a consistent combination of motivating and maneuvering tactics that include communicating a positive vision of success; helping staff personally feel the problems customers feel; working through key influencers; and silencing critics through the speedy success of early wins, thereby casting vocal naysayers as champions of failure.

## GENERAL CHANGE MANAGEMENT

John Kotter identified the main point behind most attempts at organizational change in other sectors: becoming a better competitor. Change management movements all have the same goal, Kotter said: to make fundamental changes in the way they do business to cope with new or more challenging markets.

### How do you do it?

The basic lesson to learn, Kotter said, is that the change process takes time; it requires a series of steps, and skipping them leads to failure. Even the best leaders often make major mistakes along the way, and these often derail the entire change effort. Kotter identified eight common errors, which he turned into a list of eight steps to take to prevent failure:

- \* **Create urgency:** Start honest discussions to develop the urgency around the need for change, to get the whole organization invested in change (at least 75 percent of management needs to support the change). Although this sounds easy, half of the companies he studied failed in this first phase, Kotter said.
- \* **Form a powerful guiding coalition:** Major change efforts often start very small, with just a few people involved, but enough people must join early on to work as a team in convincing everyone that change is necessary. The “change coalition” should include top leaders, but also a variety of people

with different job titles, reputations, key relationships, and expertise—including those leaders but also, for example, board members, customer representatives, and union leaders.

- \* **Create a vision for change:** Link all the ideas circulating for solutions to an overall, easily understood and remembered vision that includes values that are central to the change. Keep refining the vision.
- \* **Communicate the vision:** Include it in everything the company does and talks about, and demonstrate the desired behaviors.
- \* **Remove obstacles:** Look for people who resist the change—often out of fear—as well as processes that create barriers to making changes. Check organizational structures, job descriptions, performance and compensation plans to be sure they align with the vision. Reward people who make the change happen.
- \* **Create short-term wins:** Because real transformation takes time, have early results that the staff can see, using short-term targets as well as a long-term goal, both to keep motivation and the sense of urgency high, as well as to silence those opposed to the change.
- \* **Build on the change:** Too often, companies declare victory too early—as soon as they see early evidence of clear performance improvements—killing the momentum for all the changes needed. Changes need to become part of the company culture first, or the transformations that had been introduced will slowly fade away. Instead, after every win, analyze what went right and what still needs work, and keep building on that knowledge, maintaining the sense of urgency, and refreshing the leaders of the “change coalition” as needed.
- \* **Anchor the changes in organization culture:** The change must become part of the core processes and values in and throughout an organization, and must continue to maintain leaders’ support. The change must become part of “the way we do things around here.” Existing staff and any new leadership must communicate how the changes have improved the organization, and must consistently demonstrate the new approach.

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