Change Management and Organizational Development in Large School Systems

Presenters:
Mark Racine, Boston Public Schools
Preeti Burns, Houston ISD
Melissa Dodd, San Francisco USD
Tom Ryan, Santa Fe Public Schools
Thank you to our sponsor Facebook

All large districts experience change, whether it be a new leadership structure, budget shifts, or enterprise system implementation. Investing in change management practices and organizational development structures is critical to successfully addressing and implementing changes. The fundamentals of change management do not vary based on the number of students. They are the same whether enrollments are 2K or 200K. However, large districts have unique challenges, especially due to the number of stakeholders. Just getting everyone in the same room, let alone on the same page, is a challenge. During this forum, IT Leaders from large districts shared the strategies and tools they have used to bring about positive change in their respective districts. Conversations among forum participants focused on activities within their own districts to implement cross-functional and departmental change efforts.

ADKAR

ADKAR is an acronym for a five-step change management model:
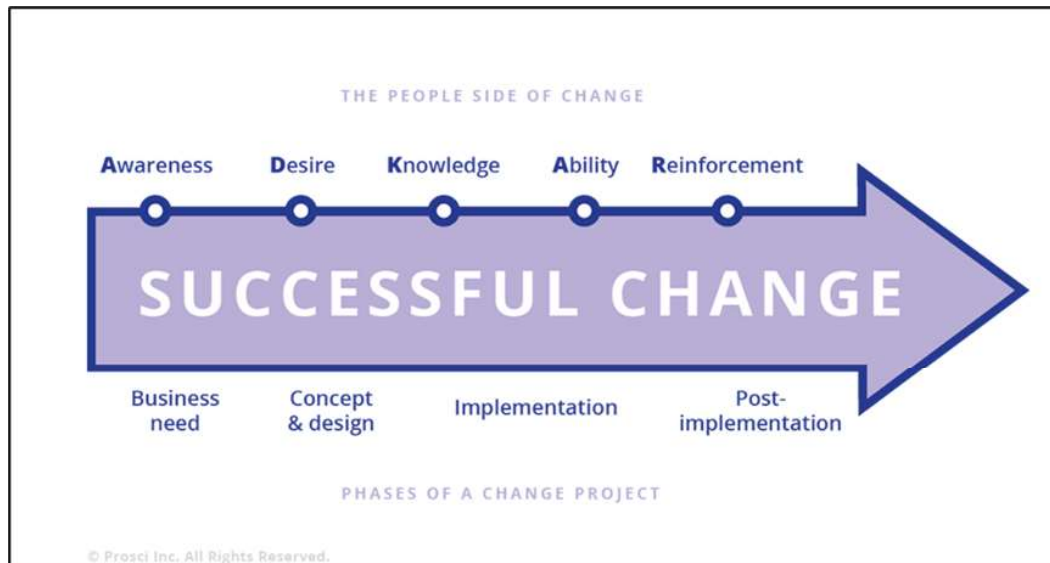Awareness
Desire
Knowledge
Ability
Reinforcement

The model addresses the human side of change. It provides a framework for organizing communication strategy, stakeholder engagement, and project management. The first step is assessing a group's awareness of the need for change. Does awareness need to be built? If everyone is aware that a current system isn't working, are they willing to change it? Many times people agree things need to change but are not actually willing to make any changes, especially if it means changing their own behavior. If that's the case, work needs to be done to create the desire for change.

To create desire, leaders need to build knowledge and the capacity for change. For example, when new technology is brought into a district, training on how to use the system is not enough. Users need to understand the "why"—not just the "how"—of new technology implementation. They need to understand why the new way is better for them and how it will improve district performance. A

core CoSN belief is that "the primary challenge we face in using technology effectively is human." If humans don't understand the purpose for change, they won't embrace it. The attitude of "Just put it in, staff is going to complain regardless of what we do," is not a model for success.

The last phase of the ADKAR model is reinforcement. Without follow-up, people tend to revert to old practices. Successful change only happens with on-going support and reinforcement.

Awareness & Desire: Is your team ready for change?
Business Need
It is essential to clearly understand and define the problem you are trying to solve. What is driving the need for the change? Are you moving to a 1:1 program to increase access? Or are you looking to engage students so they will be motivated to come to school? You need to build your plan with the desired outcome in mind. Decisions must be based on creating a strong business case that includes long-term resources (including funding sources), impact, scalability, alignment to strategic priorities, and identification of key metrics of progress. Your CFO needs to be on board with your plan.

Create Desire by identifying the WIIFM (What's In It For Me) for all levels within your organization.

Build awareness with your stakeholder groups. Create focus groups with a voice in shaping what happens, not just to give feedback. Understand what is important to each stakeholder group and use it to build desire for change. If staff does not own the solution, they can sabotage it. If change leadership is not coming from senior management, build leadership capacity in the team. Build agency with students so they can "own it" too.

Early adopters create desire in a pilot group, so it's important to keep the other stakeholders informed about what's happening in pilot programs. It builds self-efficacy. Staff will realize what is possible. Regular meetings and communication, such as the "Tech Tip Tuesdays" held in the district of one forum participant, are important to building awareness and desire.

Concept and Design
You need to have a vision but you also need a plan. Expect budget cuts and changes in district leadership. They need to be built into the change model, otherwise you'll always be in crisis mode. Crisis management distracts staff from priorities and preventions. The focus becomes reactive tactical issues rather than strategic preventive approaches.

Make sure all stakeholders are part of the decision-making process. Collaborative and cross-functional decision-making will protect efforts from a single point of failure. For example, in an effort to save money a district purchased inexpensive devices. However, because the decision was made within a silo, the needs of all stakeholders were not taken into account. After the devices were purchased it was discovered that they did not work with the district's online assessment system.

Knowledge and Ability: Is your team prepared for change?
*Implementation*
A governance structure needs to be in place. There needs to be a process to coordinate strategic priorities and resolve conflict. Resources must be prioritized, allocated, or sustained to align with key strategic priorities. "Resources" include people. The right people with the right skill sets in the right positions are needed to design, implement, and scale major change efforts. You cannot do new things with people thinking the old way.

A participant shared the "micro-pilot" method they use in their district for every buying cycle. They pilot various technologies simultaneously over 4-5 weeks. The groups piloting provide feedback and make the

> *"Get the right people on the right bus and in the right seat"* –James C. Collins

decision about which technology to purchase. This takes longer to reach a decision but creates buy-in and the desire for change to a new system. For student-facing technology, one district requires student feedback before purchasing.

San Francisco Unified School District has established a structure for building coherence and communication across their district:
- A Digital District Steering Committee—Cross-functional team of district leaders helps guide Digital District Plan
- Digital District Working Group—Cross-functional team of district staff refining a prototype for how SFUSD initiates, plans, executes, and sunsets technology
- Data Governance Steering Committee—Brings coherence to data use and protocols across departments
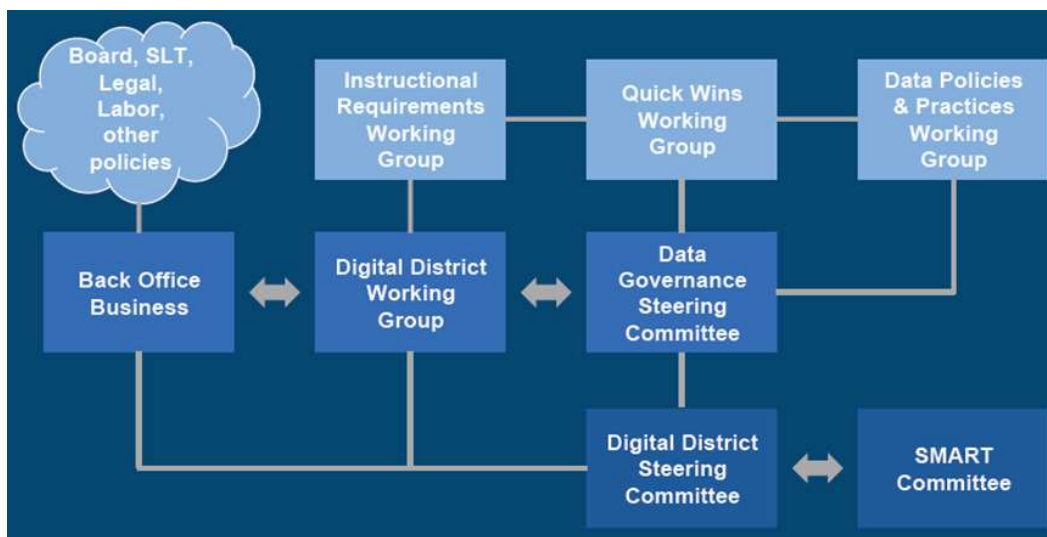
Project management is a way to achieve organizational clarity and get teams prepared for change. But teams will need training in how to work within a project management framework. There are several good models for project management, and they all start with a clearly-defined project goal or charter. It is essential to define scope, goals, roles, and milestones from the outset. Throughout the project, effective meetings must be planned and facilitated. Follow-up is critical for progress and shared accountability. At project completion, a plan needs to be in place for transitioning over to operations. When multiple projects are being managed throughout a district, project leads should have visibility into the complete portfolio of work, not just the projects they are managing. This enables a more holistic view of district goals and also enables discovery. If people are conducting similar projects, they can partner to leverage knowledge and eliminate redundant efforts and inefficiencies.

1. Definition—Define the problem
- Project intake
- Define scope
- Identify project team
- Identify stakeholders

2. Planning—Develop the plan
- Project team set-up
- Outline business requirements
- Define high-level solution
- Develop an action plan
- Stakeholder analysis
- Develop communication plan

3. Execution—Complete the plan
- Flush out detailed requirements and project plan
- Manage scope, schedule, resources
- Engage stakeholders
- Track progress
- Communicate project status

4. Transition—Close the project
- Deliverables
- Develop transition/Operations Plan
- Evaluate effectiveness
- Document lessons learned

> *"Project management is many swim lanes in one"*

Project management is both a science and an art. The science is built around tools and templates that structure how the work is done. The art is motivating and encouraging people—when to push and how to "unstick" staff to move the work forward.

The Science:
- Standard tools and templates
- Consistent methodology
- Deliverables aligned to SMART goals
(Specific, Measureable, Achievable, Realistic, Timely)
- Managing risk
- Governance structures

> *Some people change when the see the light, others when they feel the heat.*

The Art:
- How to apply the tools
- Engaging stakeholders
- Leading with influence
- Listening for understanding
- Having difficult conversations

Ongoing communication and knowledge-building are required throughout the life cycle of the project:
- Monthly workshops—Give technology project managers and leads opportunities to apply their knowledge and practice their skills
- Learning academies—Provide opportunities for central office personnel to build knowledge and ability outside of the tech department
- 1:1 coaching and consultancies—Ensure stakeholders understand project phases and how to use the tools and templates
- Annual professional learning—Focus on the art of leadership, how to give and receive feedback and manage stakeholders

Reinforcement: How do you preserve change?
Post-Implementation
After preparing for change (Awareness and Desire), and managing change (Knowledge and Ability), comes the reinforcing change stage (Reinforcement—the last step of the ADKAR framework). This is the essential final step to ensure that a change is fully adopted and sustained. Once a change has been implemented, the work is not done. Making changes is difficult, but sustaining them can be even harder. Old habits die hard and people will revert to old ways if a newly-implemented change is not reinforced.

The main activities in this reinforcement stage are:
Proactively collect and analyze feedback
- Listen to employees
- Audit compliance with the "new way of doing things"—process, systems and job roles
- Analyze the effectiveness of your change management activities

Diagnose gaps and manage areas of resistance
- Identify root causes and pockets of resistance
- Develop corrective action plans —Accountability Mechanisms
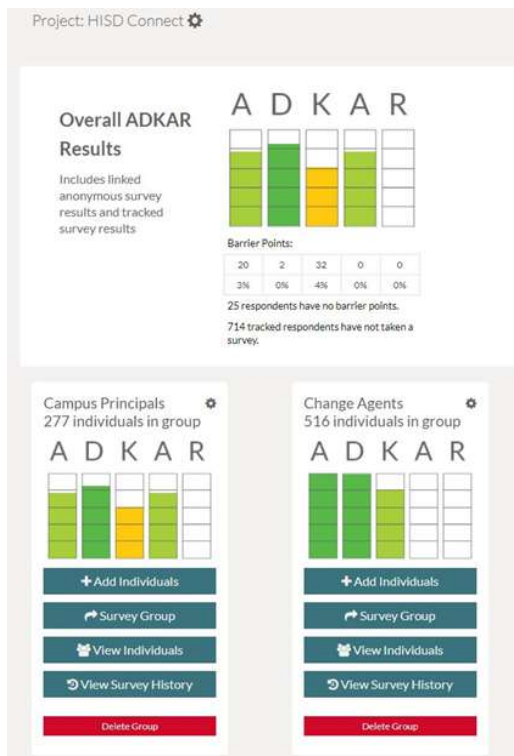- Enable sponsors and coaches to address resistance

Implement corrective action
- Celebrate successes and reinforce the change
- Conduct after-action reviews and transfer ownership of the change to operational managers
- Move to "new" business as usual

> *Training +
> reinforcement
> = behavior*

Reinforcing change is as critical to change success as the early communications to build awareness of the need for change.
Reinforcements can be actions, words, or rewards that are meaningful to the person or group being recognized; events, accountability systems, audits, feedback from employees, performance measurement systems, meaningful rewards, and celebrations of both progress and the ultimate realization of the desired outcome.

Overall ADKAR Results

A D K A R

Includes linked anonymous survey results and tracked survey results

Barrier Points:

20	2	32	0	0
3%	0%	4%	0%	0%

25 respondents have no barrier points.

714 tracked respondents have not taken a survey.

Campus Principals ⚙
277 individuals in group

A D K A R

+ Add Individuals
↱ Survey Group
👥 View Individuals
↻ View Survey History
Delete Group

Change Agents ⚙
516 individuals in group

A D K A R

+ Add Individuals
↱ Survey Group
👥 View Individuals
↻ View Survey History
Delete Group

ADKAR Dashboard

Surveys are essential tools for the change manager and project team and provide valuable information on where to take corrective action and provide more support. These measurement systems will also highlight where a change is being adopted and implemented with success, so that you can recognize and celebrate this progress, creating more energy and enthusiasm around the change.

Not taking the time to reinforce previous changes can create a change resistant culture or have individuals stuck in the thinking that "this is the flavor of the month... this too shall pass". Making future changes difficult and creating desire very challenging.

To establish an organization that is change agile and change ready, reinforce the change you have already achieved and then districts can build upon this success.

Key Takeaways

Strategies are needed to build awareness and create desire for change. Communication is a real challenge in large organizations. Building coherence across all functional areas is complex and detailed work. But there are many tools and frameworks like ADKAR that districts can use to foster meaningful communication and enable change. While the forum focused on IT leader-led initiatives, the need to be ready for external forces driving change was also discussed—"don't be the one with crossed arms" when someone other than you has called a meeting to build awareness for a change. Change is now a constant, whether driven by internal or external forces. So the best approach to organizational change is not just to manage it, but to embrace it.