Change Management Designed for Schools

Change management provides structure and oversight within change to quell peoples' apprehension and fear. With effective change management, change is far from scary. And with inspirational leaders at the helm, change is inviting, it is fun, and it is energizing. In addition to strong leadership, sustainable change requires a guiding vision, skilled team members, individual incentives, adequate resources, and a plan of action.

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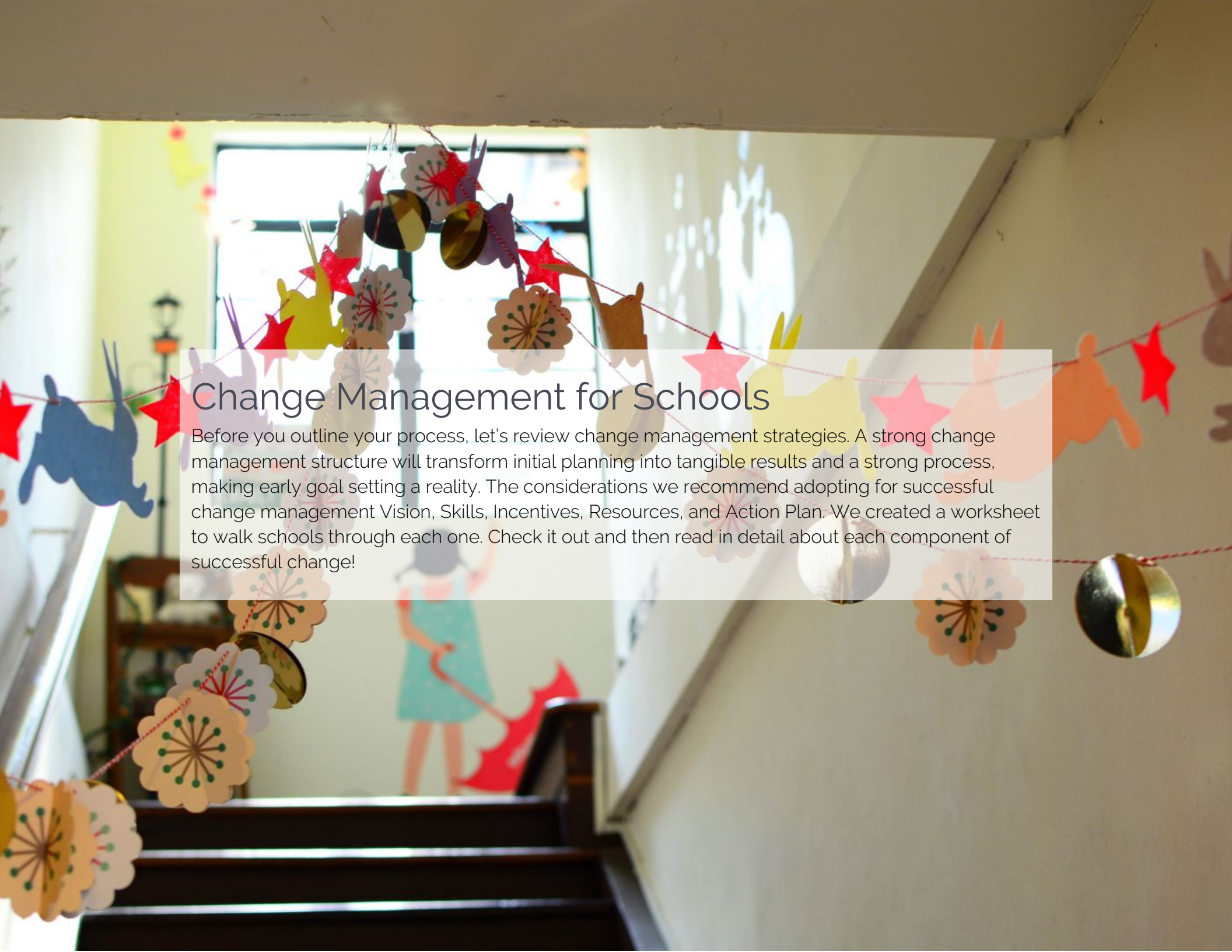
Introduction

To most people, change is scary. It requires us to depart from the known, move towards an uncertain end, and inevitably encounter a few hiccups along the way. *Why do we take on the challenge?* Without change, we cannot move forward as humans, or as institutions.

> Change management **provides structure and oversight within change** to quell peoples' apprehension and fear. With effective change management, change is far from scary. And with inspirational leaders at the helm, **change is inviting, it is fun, and it is energizing**. In addition to strong leadership, sustainable change requires a guiding vision, skilled team members, individual incentives, adequate resources, and a plan of action.

As with any organization, change management is relevant to schools and districts. Education is an ever-evolving field. From new pedagogies, new technology, new funding parameters, and new expectations for graduates, **change is a fixture of education**. School leadership needs to be prepared for these shifts and capable of guiding staff in the face of uncertainty.

Set your team up for success by following this recipe for change! In this whitepaper, we give you the tools to guide your school through change using **proven change management strategies**. We begin by outlining the most important aspects of **change management for schools** and offer **education-specific process planning steps** to help you predict potential roadblocks to success, identify current setbacks in your process, and ensure your team is on track to meet its goals. We also share case studies that highlight leaders that have successfully managing change within their school.



Change Management for Schools

Before you outline your process, let's review change management strategies. A strong change management structure will transform initial planning into tangible results and a strong process, making early goal setting a reality. The considerations we recommend adopting for successful change management Vision, Skills, Incentives, Resources, and Action Plan. We created a worksheet to walk schools through each one. Check it out and then read in detail about each component of successful change!

Change Management Guide

Vision: What is the purpose of the initiative? Why?

Skills: What experience is needed to realize your vision?

Incentives: What motivation or encouragement does your team need to buy in?

Resources: What tools and structures are needed to achieve your vision?

Action Plan: What steps will you take to succeed? What is the timeline?

Vision	Skills	Incentives	Resources	Action Plan

VISION

We teach our students by using essential questions to guide their learning and contextualize their day-to-day tasks. As adult learners, we, too, need to know why we are engaging in a challenging endeavor. Without an understanding of why your school is undertaking a new process, teachers will get confused. Create and articulate a **vision** to give your team **clarity**.

Questions to consider:

- What is the purpose for the project? Why now?
- How does this vision fit with the school mission or philosophy?
- Has this vision been shared with teachers, administrators, and the broader community?
- How will we know when we've achieved our goal? What does "success" look like?

These are guiding questions to help you define your vision; modify them to fit your specific project. For more, read our blog on how we use three questions to help schools articulate their vision when it comes to their curriculum process: http://bit.ly/vision-questions

Our go-to tip: Take the vision one step further and reach consensus. For your vision to inspire, it must be one around which your team can rally and unify.

SKILLS

Individuals who feel as though they have not been properly equipped to take on a project become **anxious**. Support your team by ensuring that they have, or can learn, the skills to **confidently** bring the vision to life. We can't expect our teaching team to master a skill after one informational training session. Give your teaching team the time and safe space to practice these skills after they're introduced. Have patience as they demonstrate their commitment to the change.

Questions to consider:

- What do teachers already know about the initiative? Have they had any PD around it?
- What is the technical proficiency of the team?
- Who among your team is an expert or potential leader?
- What additional skills will be needed as we begin?

Our go-to tip: Leverage the existing expertise in your team to foster teacher-leadership and encourage collaboration.

INCENTIVES

No change comes without barriers or points of contention. When you encounter instances of resistance, think of them as growing pains towards a stronger organization. Without incentives, team members become **resistant** to change. Dedicated though they may be to improving student outcomes, teachers need to see tangible, personal gains from the hard work they put into this initiative. Incentives should range in scope, reinforce positive components of the work, and inspire a **desire** to embrace the new undertaking.

Questions to consider:

- What will teachers gain from this work in the short term? In the long term?
- How will you encourage teachers to begin to build robust curricula? Time? Stipends?
- How will you express gratitude for your teachers' hard work?
- What benefits will the leadership team get from embarking on this project?

Our go-to tip: Build celebrations for milestones into your strategic plan! When will moments of encouragement be needed the most?

What does "buy-in" really mean and how do we build it?

Buy-in taps into one's desire to be part of a process. Teachers work to build buy-in with their students every day, and they, too, need to be shown why to care. Teachers should understand why a curriculum process will benefit your district and/or school, *and* how it will benefit their practice and students' educational experience. This involves elements of reason and emotion. Though we can't instill or simply build desire, we can help to lessen resistant feelings that come with change, like anxiety, fear, and confusion. To manage resistance from your team, explore these readily-applicable techniques for curriculum leaders.

1. Listen and seek to understand objections

Entering your curriculum discussions with an open mind will go a long way. If you work in a larger school or district, appointing teacher liaisons can support this dialogue. Many of our partner school leaders have found it helpful to have

an intermediary teacher leader listen to and speak with resistant faculty. Teachers may feel more at ease speaking with a peer who advocates on their behalf to the leader(s).

2. Remove obstacles

Through these conversations, you will learn a lot about teachers' values and priorities. They may even share where they feel they have shortcomings or lack essential knowledge to complete the tasks at hand with quality. Point to your plans, allotted training and support, time to develop/discuss/review curriculum maps.

3. Make a personal appeal

Empathy can be a powerful motivator. Hearing the words "I've been there…" in a story connects with and validates feelings. When curriculum leaders empathize with teachers' hesitation to "get on board" with mapping, they invite all emotions on the journey to mapping. Depending upon your relationship and rapport with a teacher, you may ask them to try a phase or portion of the curriculum process plans as a favor. Schedule and honor a check-in point, where you can converse again about their thoughts, obstacles, and potential solutions for the remaining issues.

4. "Meet in the middle"

If you make a personal appeal, offer a solution that requires a little "give" from you. Perhaps you will cover their classroom's art time while the teacher takes one hour to develop their upcoming curriculum unit. Perhaps one staff meeting a month is given up for curriculum mapping and announcements are relayed in an email. Designing a relevant initiative and setting realistic expectations for teachers' busy schedules went a long way in building buy-in.

5. Provide simple, clear choices and accountability

At the end of the day, willingness to participate in a new process or plan is a choice. Providing clear steps for teachers to engage in this change, as well as the advantages and/or consequences of not engaging, leaves the choice with them. Keep teachers accountable by following through on the set expectations. Be sure, too, to celebrate small moments and shifts in their participation. Celebrating is an important part of the curriculum mapping process!

RESOURCES

When teachers aren't given the resources they need to do good work, they become **frustrated**. What's the scarcest resource of all? **Time**. Teachers often find themselves overburdened, unable to give adequate attention to their various responsibilities. Prioritize the project by supporting your teachers with time, access to information, and structure. Listen to their needs so that they become comfortable with this change.

Questions to consider:

- How and when are teachers expected to integrate this work into their busy schedules?
- What exemplary material will you share with your team?
- How will you encourage a culture of coaching and mentoring?
- What avenues are available for your team to ask questions and offer feedback?

Our go-to tip: Create an "Intro" process for teachers that includes tutorial material and periodic check-ins for support.

ACTION PLAN

Give teachers a sense of what to expect over the next few years. Without a roadmap, teachers feel lost. When this happens during the initial phase of change, the lack of direction leads to numerous **false starts**. Avoid these traps and work toward **continued progress** with a multi-year plan. The plan should include measurable, actionable first steps to demonstrate immediate gains for the team.

Questions to consider:

- Where do we hope to be in one year? Two? Five?
- Who will be involved, and at what stage of the timeline?
- What systems are in place to act on progress and results?
- Beyond major milestones, when will teachers have time on an ongoing basis?

Our go-to tip: Include in your action plan how and when you will communicate with your team regarding milestones, risks, next steps, progress.

With continuous changes in education policies and school make-up, we must not expect that we will "finish" the work of managing change. As teachers, there is always room to revise and improve our practice to ensure that our students receive the best instruction possible. As leaders, it is our job to stay mindful of our teams' emotions and needs and revisit this change management protocol. This requires flexibility and patience, but it is well worth the team-wide success.

Process Planning for Schools

Now that you have an overview of change management, it's time to jump into your process planning. While building your process, you define your end goal(s) and how you will achieve them. In clearly articulating these milestones you work through potential obstacles, recognize the nuances of the change, and make the plan accessible to your team. This will leave all involved – including yourself – feeling supported and empowered, rather than anxious, confused, or frustrated.

IDENTIFY THE ELEMENTS

To design a successful process, there are three main elements to consider:

> **Tasks:** What must be done in order to reach the desired outcome. Tasks may be as straight forward as creating a schedule for a testing week, or more complex, such as developing graduation standards. Often, more complex tasks can – and should – be broken down into smaller sub-tasks.
>
> **Time:** How much time it will take to complete the outlined key tasks. This includes timelines, deadlines, and duration of the tasks.
>
> **Resources:** What your team will need to achieve the end goal. This can include work time during in-service days, professional development, and supportive software or technology.

These key elements are interrelated. If one element changes, it will impact the others. For example, if you have to reduce the amount of time you can dedicate to professional development for teachers, you may need to adjust the number of tasks you had planned to complete that academic year.

Our go-to tip: Outline the tasks included in your process and clearly identify how much time you have available to dedicate to this work. Think about the specific sub-tasks that will be involved, how much time each will take to complete, and the frequency (or consistent time) individuals will need to complete those tasks. You might also consider where and how can you reallocate time to maximize the impact of your team's work. From there, it's easier to identify the necessary resources.

CONSIDER EVERYONE INVOLVED

Once you have drafted a plan with the time, tasks, and necessary resources, consider your "**stakeholders.**" A stakeholder is a person with an interest, investment, or concern in something. What is "at stake" for teachers? You guessed it: time! By doing a stakeholder analysis, you can proactively think about the all-important "buy-in" piece of your long-term goals and plans.

Determining the degree to which certain groups' interests will sway the success of your process needs to be considered throughout the project. Armed with this knowledge, you can proactively build buy-in with these groups based on their key motivators.

Our go-to tip: Make a list of the key stakeholders split across 2-3 groups (e.g. teachers, administration, parents and students).

Analyze the groups' power and impact. "Power" refers to the sway a group has in the project, while the "impact" relates directly to the tasks that need to be accomplished. These two factors can be qualified as high or low. For example, if teachers are expected to diary map their curriculum, they have a high level of power and high level of impact on the overall success of the curriculum mapping initiative.

List out key motivators and characteristics of the groups that have high power and impact. List the interests and incentives of your process that directly relate to the group's interests. What changes can you make to your project to address their key concerns and ensure they benefit from their involvement?

KNOW AND PLAN FOR OBSTACLES

All processes and projects have risks. Perhaps funding changes, there is leadership transition at the school, or teachers' time to engage in curriculum is cut short. Though many risks are unforeseen, many can be prevented (or their effects minimized) with careful, proactive planning. Without understanding what the risks may be – and having thought ahead about how to get around them – your plan may not be as viable as you hoped.

Our go-to tip: Think back to the three factors (task, time, and resources) of your process. Reevaluate what you have outlined. Key questions to consider include:

- Have you made any assumptions in the outline of the three factors? A common assumption we see is around time (e.g. teachers will work on their own time). Without time clearly allocated, this assumption often leads to frustration and other road blocks.
- What other initiatives may take away from or influence the three factors? We have to look at this change within the bigger picture of the school or district. Often, there are competing initiatives, so it is essential to readjust expectations in line with an over-arching strategic plan
- How can you plan for changes and their potential impact? Unforeseen obstacles arise. And, while we may not be able to predict what they are, we can add in extra time or funds to ensure they do not deride the project.
- Did you assume any characteristics or key motivators? Be sure to revisit your analysis of everyone involved in the process. How might you gain relevant insight from the group itself, to double check the key incentives are accurate and meaningful to the group?

BUILD A TEAM

Processes revolve not only around the outcome, but also the people involved. In addition to having a sound multi-year plan, we strongly encourage building a core leadership team. Some schools decide to have multiple teams, such as grade level teams, building teams, technology teams, and professional development teams. As a bonus, teams might also help to identify stakeholder needs and potential risks to your plan.

Once you have your team assembled, it's time to begin their leadership journey. Setting expectations, for the team and the goals, is essential from the beginning. Note that some schools have found it effective to begin with an outline of their curriculum process factors (i.e. time, tasks and resources) and then collaborate with the team to make final decisions as a group.

Our go-to tip: Use the following outline for your first meetings with the team:

- Share your plans and vision with the team(s). Consider their feedback and input. They may identify resources or risks you hadn't considered.
- Provide time for your team to set norms and bond as a team. Allow them the space to understand and expand upon their role and responsibilities, considering each member's unique strengths.
- Structure your process so the team can gradually lead the tasks. There are a few key phases to set your team up for this successful path:
    - Forming: Team comes together and defines their role, as well as the curriculum process.
    - Storming: Team identifies things to change and how to do it.
    - Norming: Team establishes relationships and confidence as a group.
    - Performing: Team examines and executes tasks at a high-functioning level. The project/process leaders guide, when needed.

COME BACK TO YOUR PLAN OFTEN

Once you've formed a plan, put all the pieces in place, and set the work in motion, it's important to build-in time to check on the progress of each element. Planning time to reflect and reevaluate ensures this essential tip will take place. Whether things are going well or have gone off-course, set milestones and schedule meetings to review your

plan, touch base with influential groups, reevaluate the status of potential risks/roadblocks, and check-in with your teams.

Our go-to tip: Keep your plan on track by:

- Returning to the vision for beginning this work. Has it changed or evolved?
- Checking the factors (time, tasks, resources). Have these changed? Are there other initiatives that could be included in this task or will influence these factors?
- Checking in with influential groups. Have the key motivators for your highly influential group(s) changed? Survey to see what professional development needs and/or questions exist.
- Reevaluating where you are in the change cycle. What roadblocks may lie ahead this year?
- Coming back to your team. Do they have rewards/incentives, skills, reasonable timelines to be successful in (eventually) leading this process? Moreover, do they have trust in you?

School Stories

We work with schools and districts as they initiate, oversee, and manage change. We get to celebrate their successes and are able to share them with you! We hope you can learn from their experience. Here are some of their stories.

SCHOOL CHANGE WITH CURRIUCLUM MAPPING

Anne Egan and Lorin Helbling, Blessed Sacrament Parish School and Cathedral Catholic High School, detail lessons from their experience leading a curriculum mapping initiative.

Curriculum mapping is not a noun. It's a verb! School leaders and teachers communicate actual learning within a framework for school-wide improvement through collaborative and reflective practice. In order to be successful, it requires shared goals, clear roles within a growth mind-set; for most schools, it's a cultural change with learning at the core. It means moving away from the "old way of doing things" and for some this is very scary and threatening. It will take a committed leadership team with a vision and clearly articulated goals to lead change successfully. Here are some lessons learned:

- All in leadership must understand this not a program but a culture change. Accountability for professional expectations and behavior must be clearly articulated.
- The leadership team must have a clear understanding of the curriculum mapping process along with well-defined clearly articulated goals.
- The faculty must be able to articulate the goals and understand it is not just another program or a means of recording curricular scope and sequence in an electronic format – it is reflective practice that guides all decision making.
- Curriculum mapping is a team effort – as stake-holders all administrators, counselors, administrative support teams, and faculty members are expected to actively participate.
- Too much time discussing what and how to go about curriculum mapping rather than actually doing it can give recalcitrant faculty more time to dig in their heels.
- Lack of consistent calendared time can undermine the process.
- When new programs are added, be able to clearly articulate how they connect to those already in place.

CREATING SUSTAINABLE AND LASTING CHANGE

Kelly Bucherie from Magnet Schools of America shares with us her tricks for creating lasting change in schools.

1. Have a zone of proximal professional development

Create opportunities for teachers and staff to experience "professional development" in a systemic manner so that changes are implemented and supported.

Teachers familiar with Vygotsky's idea of "Zone of Proximal Development" know that the "ZPD" is the sweet spot of learning—not so challenging that students can't do it, but challenging enough that students push beyond their comfort zone. Professional development is the same way. Professional development is optimal when participants work outside their comfort zone; i.e. not with their colleagues, not at their work site, and not in isolation. Teachers should be pushing themselves during their professional development as much as they strive to challenge their students. For sustainable change, they should be in their ZPPD: Zone of Proximal Professional Development. Remember: professional development can be as simple as observing fellow teachers or as expansive as added workshops and conferences.

2. Collaboration

Another technique that we encourage our students to use—yet we, as educators, may not always partake in—is collaboration. Collaboration should move past talking, sharing, and reaching a consensus. There must be critical thinking to solve a problem or an issue. Not only should collaboration involve teachers and immediate staff members in the school, collaboration between all stakeholders, parents, teachers, admin, and students, should occur so that ALL are invested in the improvement and progression of the school. If there is collaboration, that means there is active involvement.

3. Calibrate

When collaborating, a critical technique to improve upon that collaboration is calibration. Science teachers know, before a lab, all devices must be calibrated to provide the most accurate and precise manner. Calibration of standards and/or expectations among different and various stakeholders can bring clarity to your program, your deficits and your successes! Be inclusive when determining your status on a standard.

4. Have a system

Regardless of the goal—whether it is focused on an individual, a classroom, or overall school improvement—it is imperative to have a plan or a system in place to hold everyone accountable. Having a system, even if it is as simple as a word document, provides a recorded baseline, a level of formality that simply discussing a change would not provide.

FROM VISION TO ACTION

Jenni Swanson Voorhees, Sidwell Friends Lower School, outlines the steps taken by the school to initiate change after determining the vision – making their vision a reality.

1. The year before we started mapping, the principal and I attended a Leadership Institute workshop in Portland, Oregon at Atlas. There we gained a greater sense of the **value of mapping and the potential challenges** we might face getting it off the ground.
2. We spent one day with a willing third grade teacher who began to put the third-grade math curriculum into the first version of the unit template we had designed. **By the end of the day we had tweaked the template and learned a lot about how best to use the categories**
3. In the summer, we spent another day with teachers from every grade to give them an opportunity to also try out the template with their math curriculum. Teachers had more questions and we were able to make **more adjustments to the unit template**. By the end of that day we had researched resources for Enduring Understandings and Essential Questions, and we had many more teachers experienced with mapping.
4. We decided to use the "Core Team" approach to introduce mapping to the whole faculty. We invited teachers who were seeking leadership opportunities to volunteer for the Core Team. They serve as the representative of their grade level and are the go-to mapping resource for their colleagues. Many people stepped up to this challenge and willingly volunteered to meet on one day in late August to plan how mapping would be introduced and supported during the coming year. **By framing this as a teacher-leader role, we attracted teachers who were eager to think through the best ways to present this material to their colleagues.**
5. Working with our Account Manager, **we planned an agenda for our onsite training that would offer teachers plenty of input and discussion while also serving as an introduction to the mapping process.**
6. During our all-day Core Team workshop, teachers chose to focus on curriculum mapping as a **living, interactive document to benefit the community through the transparency and collaboration opportunities it offers**. The Core Team was able to suggest further changes to the template and request more resources to make available when we presented mapping to the whole Lower School faculty. These changes were made on the spot and we were able to work with them real-time.

7. As a Core Team, we agreed on **reasonable goals** for this year, a schedule for meetings, and **suggested benchmarks to measure our progress**. This was made into a slide that could be printed and shared.
8. In preparation for the faculty roll-out, the Core Team designed a day-long workshop to introduce mapping. They planned a morning of interactive presentations followed by afternoon meetings in grade levels. Based on their concerns about **common language and understanding** among our faculty, the morning agenda, run by Core Team members, included:
    - To create Unit Calendars for all our subjects
    - To write Enduring Understandings and Essential Questions for all our Units.
9. The afternoon session of the faculty roll-out allowed groups to disperse into grade level meetings to begin mapping.

From the very first day we could feel the enthusiasm about this new venture, led by teachers who were invested in their leadership roles and eager to work to support and guide their colleagues. Six months later we have had monthly faculty meetings dedicated to mapping. Grade level teams have also devoted one meeting a month to discussing their maps. The Core Team will meet soon to do a quick check-in about our grade level's progress and to reflect on how the year has gone so far. We hope that this enthusiasm for mapping and sharing our curricula will carry us through to next year when we will expect teachers to begin to put their content, skills, and assessments into the maps.

Conclusion

Change does not have to be scary. With change management strategies and sound process planning, your school or district can successfully initiate new projects and processes that are carried through to fruition. Keep up with shifts in education, and, ultimately, empower student achievement. Happy planning!