

## Week 12: Change

### I. Highlights

- A. Change is very personal. We all react differently, some more flexibly than others.
- B. Your expectation of what's coming affects how easily you handle change.
- C. "Top-down" change is dictated from the boss and imposed on everyone else.
- D. Success is more likely when we agree change is needed in the first place.
- E. Not all change is good. Remember to ask if the change is worth it.
- F. Change has ripple effects/unintended consequences.
- G. Elements for successful change: vision + education + incentives + resources + action plan. Negative consequences if any of these is missing.
- H. Hard side of change = measurements + timelines + policies/procedures + securing resources
- I. Soft side of change = vision + attitude + buy-in/commitment + creativity + overcoming resistance
- J. Influences & concerns = pros/cons + cost effectiveness + social approval + complexity + efficiency + trialability + observability + compatibility + terminality
- K. Transition phases = denial & shock >> resistance & strong emotions >> negotiation >> valley of despair >> acceptance (or not, and give up at this point) >> exploration & experimentation >> full commitment & integration

### II. Homework

- A. Group project (case study) presentation and paper due next week!
- B. Articles on Angel about change, plus others that may help with the case studies.  
Read whatever she posts.

**III. Activity: Get in precise alphabetical order by first name. Fill every chair. Shift to accommodate new people who come in late.**

A. What are you feeling with this activity?

1. Uncomfortable being out of my normal seat/ position
2. Embarrassed to not know everyone's name by week 12
3. Annoyed to keep having to shift when people come in late (which six people have done so far in ten minutes)
4. Cramped to be sitting so close to people I don't know well
5. Distracted having people on all sides
6. Annoyed not to be getting away with the talking that normally happens in the back row
7. Glad to get scrambled up, good to have to be next to different people, maybe talk to someone you haven't talked to before
8. Time waster! It's taken us 15 minutes to settle down.
9. Feels very restrictive. We're adults, why can't we choose where we sit? This feels like elementary school.
10. Anxious being next to unfamiliar people in a strange location. Takes away a coping mechanism for us.
11. Curious where this is going...

B. Tonight's topic is change. That's the point.

C. Quote: "Change: only babies like it." Yet change is inevitable.

D. This is an example of a top-down imposed change. Terry's behavior is different, more directive/barking orders/demanding we do it her way, the classroom is set up differently, she's asking different participation of us.

## IV. Change

A. Change is very abstract, yet very personal. We all react differently to change.

Some of us are more flexible than others.

1. Some go with it, adapt, figure out the new rules and go along with it.
2. Others have a harder time because we're slower to adapt to change. Can be based on temperament and biology and childhood experience. We need time to warm up to change.
3. Maybe feeling anxiety / apprehension / discomfort right now. For some, that will dwindle during the evening. For others, it will be hard all night because it takes a long time to adjust.
4. Where are you on that continuum?

B. Harder or easier to change depending on your mental expectation / perception. If you come into a situation expecting one thing and something else happens, there's more to deal with cognitively, socially, and emotionally. If you come into a situation without expectations, there's less work to do overcoming that expectation and can get right into adapting to the change.

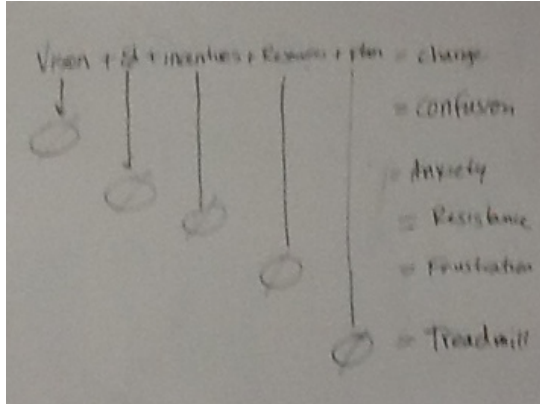
1. Values and beliefs have a lot to do with change.
2. If this happened the first week of class, some of us would drop the class.
3. Others would take it as the way things are going to be and accept it more easily than we are tonight after 11 weeks of a different atmosphere.
4. Emotion around change is even stronger if you're attached to an outcome you're expecting, such as dinner at your favorite restaurant and then your husband chooses a different restaurant on the way.

C. Change is a process that takes time, has several steps that move us through the process and set up our new normal. This can take a short time or a long time depending on how big of a change it is, and depending on whether the change was imposed by someone else or was your own decision from within.

1. This is “top-down” change because Terry ordered it.
  2. It could be “bottom-up” change if we all decided together that this is nonsense and we’re moving the tables a different way.
- D. Success for change, especially bigger changes, is more likely when there’s agreement that change is needed.
1. We’re resisting tonight because nothing was wrong with the way we were sitting. This change is imposed on us.
  2. At work, if the staff feels the need for change, it’s more likely to succeed regardless of who starts it.
  3. Imposed change that doesn’t have buy-in/ commitment usually doesn’t last long or become the new “status quo.”
- E. Not all change is good. Our fast-paced Silicon Valley life conditions us to seek change (technology is always changing, the grass is greener on the other side, new clothing styles out every few months) and think it’s better, but change is not always for the best. Think about, is this change worth it? Is it going to be beneficial? Or do we not need this so it might make things more negative instead of helping?
- F. Change has ripple effects. The bigger the change, the bigger the ripple because it influences more people, especially at work.
1. We can make great plans and coordinate and implement the process very effectively, and there can be great buy-in, but there’s almost always an unintended consequence too. Be prepared to spot that and deal with it when it happens.
  2. Sometimes a change in one area seeps through and causes change in other areas, whether we want that or not.
  3. Example: technology is wonderful in some ways, but has really hurt our social interactions in other ways. Unintended consequence of devices that

- were supposed to make life easier, so we have to come up with strategies to counter this.
4. Unintended consequences can be positive or negative, can add a layer of complexity to what we thought was a simple change.
- G. Change is highly personal. We can approach change with very careful planning of all the details, but people's reactions will always be personal and may be unpredictable.
1. Different for each person based on personality characteristics, beliefs, values, past experience/history, even if the change is necessary
  2. Be prepared for this social-emotional piece that will come up, guaranteed, because we all react to change in very personal ways
- H. Think about the last big change you went through. What aspects of your personality came out in that? How did you handle it?
1. Depends on whether it's imposed from the outside or voluntary from the inside, depends on whether we get warning ahead of time or not, depends on whether it's work or family, lots of variables
  2. Depends on whether the change is to something you have experience in or not, such as teaching a different age group
  3. Comes more easily if you've been through lots of changes before (you've learned coping strategies growing up) or not
  4. Some of us are slow-to-warm, will resist at first and then be okay
  5. Some of us are planners, and immediately start making checklists and plans to cope with the change
- I. Change happens more fluidly when these things are in place
1. *Vision*: is there a plan or rhyme & reason to this?
  2. *Education*: do you have the knowledge base and skills to deal with this and do what we're asking?

3. *Incentives*: are there incentives (money or not, what's in it for me?)
4. *Resources*: enough money, time, human power, etc. to carry this forward
5. *Action plan*: more step-by-step, who's doing what and when



*Sorry this is blurry. The factors are spelled out above, with the unintended consequences below if those things are missing:*

6. Unintended consequences of a change that isn't fully planned:
  - a) If vision is missing, the resulting feeling is confusion. If I don't know why we're doing this, it's confusing.
  - b) If the education is missing, it results in anxiety. I don't know how to do what you're asking! Stress! This anxiety can be debilitating, even to an otherwise competent person.
  - c) If the incentives are missing, it results in resistance. Why should I care? If I wait it out, she'll get over it and things will go back to normal. I'm not invested in this.
  - d) If the resources are missing (not enough time or materials, not enough warning in advance to prepare, not enough people to support it), the result is frustration. This can also lead back to resistance and anxiety. We want to do this but don't have what we need to carry it out effectively. This is common when centers try to adopt a new curriculum model, or K-12 right now adopting Common Core.

- e) If the action plan is missing, the result is a “treadmill.” We want to, we’re trying, but we never have what we need in the right place at the right time because pieces of the puzzle are missing, timing is off, we never really get anywhere without that plan.
- 7. Remember there’s a personal piece. Anxiety may look different for one teacher vs. another, but it’s still anxiety.
- J. Our stories
  - 1. I’m a planner. When change comes that’s beyond my control, I immediately jump to the action plan. If there’s no plan, I’m a basket case until one gets written. I’ll write it.
  - 2. A new play-based director comes into a Montessori center and wants to make lots of changes. She can’t explain why except “upper management says so.” They’re missing the vision (why do we need to change?), the education (does she really understand Montessori?), the incentives (no benefit for changing), the resources, and the action plan. This is going to be a disaster.
  - 3. Some will try to show support and find ways to make harmony, even if it means following a lesson plan you don’t agree with or a leader you don’t know well. When she was new, she was very vocal about opinions and ticked off a lot of people. Going along with things she doesn’t like is a way of getting that unity and creating trust with the team.
  - 4. Think about each of these pieces when we’re in charge of a change.
- K. Hard (concrete, technical, factual) side of change (have to account for these when planning)
  - 1. Measurements: how do we measure success (dollars, enrollment numbers, statistics, etc.)
  - 2. Timelines: this week? three year plan?
  - 3. Procedures & policies

4. Securing resources: money, staffing, supplies, location/square footage/storage, etc.
- L. Soft side of change (also have to account for these when planning, because change is personal, not mechanical/technical)
1. Vision: why are we doing this, how does it fit into what we want for our organization and our people
  2. Attitude: do we (as an organization) hate or resist this? Is this good for everyone or are we gritting our teeth and getting through it because we have to? Is the director setting a positive or negative tone?
  3. Buy-in/commitment: from key people, or this will all fall apart
  4. Creativity: seeing the same thing from a new perspective, or embracing something new, change can be a breath of fresh air, create new ways to do the tasks that come with this change
  5. Overcoming resistance: resistance may come from the lack of incentive in the plan, but more often from not believing the change is necessary or not trusting the people in charge of it (never try to make changes before establishing trust because no one will follow you)
- M. Influences and conscious or unconscious concerns people have with change (also have to account for this when planning)
1. Attributes of innovation (pros, neutral, cons): is this going to move us forward, backward, or stay close to where we are?
    - a) If the answer is neutral, do we even need this change? What will happen if we do nothing?
    - b) Sometimes the change keeps us neutral but doing nothing will be a negative as the world moves on without us.
    - c) Example: We're okay right now, our pre-K works well, we can ignore all these changes in universal preschool and transitional kindergarten. Doing

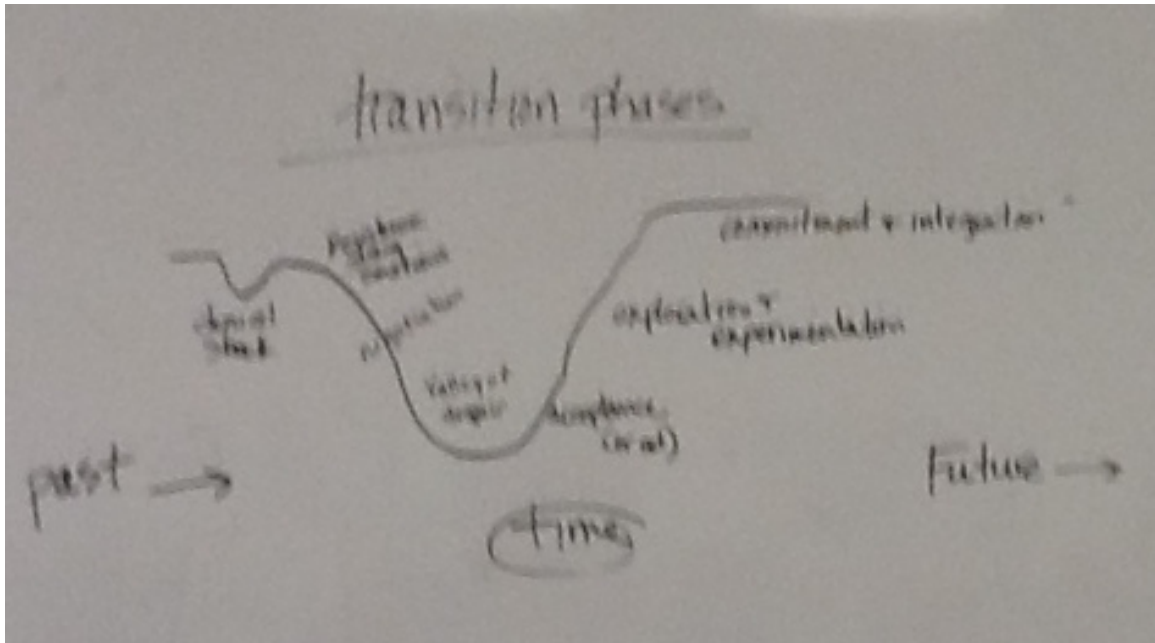


nothing means we'll get left behind when those changes happen to the world around us in the next few years.

- d) Sometimes this is addressed in the vision of the plan. ("We're making this change because...")
  - e) If this isn't clear, there's confusion about why this change even matters.
2. Cost effectiveness
- a) don't implement change we can't afford or that isn't sustainable
  - b) if the program is underfunded (no supplies, no raises), you'll get more resistance because of the perception of spending money on this fancy new change when there are basic needs not being met. Comes across as not caring about the employees or not having trustworthy priorities.
3. Social approval
- a) Could be how the community perceives you, PR/ goodwill
  - b) Could be personally, whether the teachers in the classrooms agree on this change so some follow it and some don't, affects peer social approval when someone decides whether or not to follow the change
  - c) Definitely a cultural and personal aspect in this (attitude of respect and compliance toward boss, vs. comfortable challenging the boss if you disagree)
4. Complexity
- a) more complex the change, the bigger the scope, the more time we need to make the change and understand it
  - b) need more planning for both the hard side and soft side details
  - c) maybe make the changes slower with smaller steps at a time
  - d) even if you have a lot of buy-in/ commitment, people can be get lost in the details if there's too much happening at once, end up with resistance

5. Efficiency: are things thought out and executed well, the right things happening at the right time, new forms are ready to use
6. Trialability: is there a way to try this out on a smaller scale, can we “test the waters” and if it doesn’t work, can we change it? Is there a way to get a feel for it before we commit all the way?
7. Observability
  - a) Can the change be observed? How will we notice the results? Are things smoother? Are people happier? Are there more children enrolling?
  - b) Can we see this in practice somewhere else and then imagine it happening with us? Helps the staff prepare for our change by seeing it somewhere else first-hand.
8. Compatibility
  - a) “Goodness of fit” (a phrase from temperament research): does it go together and mutually support our program?
  - b) Is the change we’re asking people to do compatible with our program’s values, beliefs, and what we’re already doing?
  - c) The play-based director coming into a Montessori school and making changes is struggling with this.
  - d) Have to consider organizational compatibility, plus individual compatibility. Does it fit our people’s values, knowledge, skill sets, resources, etc.? Can we actually carry this out?
  - e) When there’s a mismatch, it results in negative feelings, resistance, anxiety, and people feeling threatened by the emotional conflict.
9. Terminality: can we stop it? If it doesn’t go well after a while, is there a way to end it? Can we back up, stop, slow down, or find a compromise/ middle ground if we need to? Do we have a place and a process to discuss this possibility as a team?

N. Transition phases (can last a while or happen quickly, depending on the type and complexity of the change; is similar to grief process)



Sorry this is blurry. The steps are spelled out below:

1. Steps

- a) Denial & shock (not open to new information yet)
- b) Resistance, strong emotions (admit it's real, but still a lot of emotion, often negative, discussion/arguments)
- c) Negotiation (I'll do this if you do that...)
- d) Valley of despair (uncomfortable, maybe depression/the blues, maybe anger, maybe hopelessness, as we ask people to let go of what they did/knew before and make room for new behavior, causes some "cognitive dissonance" which is very uncomfortable because we haven't mastered the new thing yet)
- e) Acceptance (or not)
  - (1) propels us into the positive steps of dealing with the change

- (2) is the point where people can decide not to deal with it and exit instead (move to a new center instead of dealing with a 4th new director in 4 years)
  - f) Exploration & experimentation (let's try this, tweak it a little here or there, figure out what works)
  - g) Full commitment & integration (becomes the new normal, is the desired end outcome, could take days or years depending on the complexity)
2. This process is the same regardless of how you handle change. If you're flexible and adapt easily, the steps may go faster, but it's the same process.
  3. Getting a group of people through this process to this desired end feels really good, builds a strong group. We are at risk of losing a person or two along the way if they're not willing or able to make the change. It's painful but part of the process.
    - a) A lot of this is so human, so much a part of life, so it can be helpful to think about stressful change times in terms of these steps. This is what's happening. People are not going crazy, it's natural, and it won't last forever.
    - b) Our world says "learning is fun," but in reality, it's not that fun. It's uncomfortable to scramble our brains and create new order.
- O. This research about change was in place 30 years ago, but we've paid a lot more attention to it as society is changing so much more rapidly today.
1. This comes from business and systems theory, but we're applying it to education.
  2. Old top-down style like IBM 50 years ago is out. Things are more group-oriented now, the "worker bees" have more say, and this change research reflects that.

3. Our relationship-based industry can't handle that top-down structure.  
Teachers need more voice as we move into more reflective and collaborative style compared to 30 years ago.