



SHELL
EDUCATION

Orchestrating School Change

Transforming Your Leadership



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Foreword

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Chapter 1

What Is School Orchestration, and Why Is It So Important?

As leaders, we are all focused on initiating, supporting, and maintaining effective changes in our schools to serve students in better ways. This book serves as your guide for making those kinds of significant and much-needed changes happen. As we begin our look into this kind of change, consider this all too common example of traditional change efforts:

Culver Elementary School: A Case Study

T.M. Culver Elementary School, a K–5 school with approximately 600 students in a suburban/urban part of the Midwest, boasts a relatively diverse population. Between 30–40 percent of students in Culver do not meet the state proficiencies in reading and writing, and a significant area of concern has been in mathematics. Culver’s students, across all grade levels, do generally worse in mathematics than other students in similar elementary schools in the region.

The culture at Culver is relatively stable. The grade-level teams at Culver have always met regularly to discuss curriculum, instruction, and student discipline issues. Trust and congeniality seem to be high within, and among, the grade levels at Culver. Teachers enjoy friendly professional and personal relationships with each other, and turnover among the staff at Culver is relatively low.

Culver’s principal, Shirley Russell, has been at Culver for seven years, and she has become increasingly concerned about overall student performance in reading, writing, and especially mathematics. A few years ago, she directed her teachers to analyze the student performance data and meet in teams to address the performance gaps. These efforts have continued for several years, but Culver still has not met its targeted performance standards in mathematics. While they met their targets in reading and writing, Ms. Russell was still concerned that many students were not as successful as they could be in those areas either.

For one full year, Ms. Russell gathered data to illustrate her concern, with the hope that the data would also point to remedies. In order to help

her clarify the problem, she spent large amounts of time in teachers' classrooms. She conducted informal walk-through observations and required formal teacher observations. A pattern in these observations began to emerge. Ms. Russell noticed that in the vast majority of cases, teachers were teaching to the whole group, even in reading. She rarely saw the teachers involve the students in conversations about their learning. Most of the teaching was "stand and deliver" by the teacher, and this information concerned her. She knew that with the move toward more intense learning standards, required by the state, the focus had to be on differentiating the work and engaging the students in longer, more sophisticated analyses of learning and application of skills. She knew that the "stand and deliver" approach to teaching would not address the intent of these new learning standards.

At the end of her year of classroom visits and analysis, Shirley Russell discussed her concerns with her leadership team, which consisted of grade-level representatives and special-area representatives. In these discussions, she mentioned what she was seeing in the classrooms and why different teaching strategies might address their student performance needs better.

This series of discussions with her leadership team culminated in the decision that professional development in differentiation strategies might address the concerns about whole-class teaching, and the lack of grouping and altering of work or processes to meet individual needs.

The leadership team agreed to study differentiation on their own for several months. Principal Russell sent two members of the team to a seminar on differentiation. In addition, the team began a book study on differentiation and met twice a month to discuss their readings, learning, and ideas for Culver.

At the end of this period of study, Ms. Russell's leadership team conveyed general enthusiasm for the extensive professional development in differentiation for the faculty. It was determined, by the team, that this professional development would begin in August of the upcoming school year. Principal Russell, excited that her team had come to this conclusion, jumped at the chance to begin initiating this professional development at her school.

Principal Russell knew that if she were to undertake this major initiative, her central office would need to be supportive. She met with key central office leaders and illustrated her concerns. The central office staff members were enthusiastic about the professional development and offered a small amount of funds to support the initial training.

The leadership team began the August training with an overview that lasted one-half day. Following this overview, two consultants, nationally known for their expertise in differentiation, conducted the training with the staff. This training lasted an additional two days. At the end of the training, Ms. Russell asked participants to complete a “ticket out the door.” This informal evaluation revealed favorable responses to the training and general enthusiasm for the ideas presented in the training.

Once the school year began, Ms. Russell began supporting the implementation of differentiation in small steps or low-prep strategies. She assumed that because she had discussed the idea so thoroughly with her leadership team, all teachers understood the goals of the training. Russell pressed for implementation of low-prep strategies by communicating directly with teachers in informal conversations. She sought opportunities to troubleshoot the initiative with her staff and encouraged all reluctant or hesitant teachers to get on board with trying differentiated strategies. Almost all of the conversations Ms. Russell had with her teachers during September or October were generally positive and no real opposition was voiced. Principal Russell was thrilled and scheduled her November follow-up training.

The November differentiation training was conducted by the same two national consultants and lasted two additional days. At the end of the training, respondents were again asked to give their feedback. At that time, feedback was generally positive again. At the completion of the training, Ms. Russell announced that she would be in classrooms to support the implementation of differentiated strategies.

During November and December, classroom visits were conducted by Ms. Russell. As she visited classrooms, she began to notice the implementation of differentiated strategies was inconsistent. Some teachers were implementing only one or two strategies. Other teachers, however, were not seen implementing any visible differentiated practices. She was alarmed as the feedback from the training had been so generally positive. She decided to visit team meetings to support the implementation of the training. During these meetings, she reminded teachers of the practices they should be implementing. Again, during these meetings there was no overt opposition to the practices she was promoting.

By January of that year, Russell had not noticed remarkable improvement to the practices she had seen in September and October. In fact, it seemed that most teachers had adopted one or two differentiated strategies and were using them over and over, not pursuing any deeper exploration of sophisticated measures taught in the extensive training. In

fact, Ms. Russell began to hear, for the first time, open resentment to the lack of involvement in the original decision as well as the changes that were being required of teachers. During team meetings with Ms. Russell, relationships seemed awkward and a bit strained. Principal Russell began targeting teachers who she thought were most oppositional to the practices and started to spend more time in their classrooms to send them the message that the changes were important. She was direct with these resistant teachers, requiring them to implement the differentiated strategies immediately. Principal Russell began documenting these teachers in writing and sending them to other teachers' classrooms to observe differentiated strategies. These efforts yielded few changes with the reluctant teachers' practices.

In addition, parent complaints began to emerge. Apparently, teachers were communicating to parents their dissatisfaction with the new instructional practices, stating that they were expected to do too much, there was not enough time to plan, and that students were confused about the new strategies. Parents began questioning the changes and openly questioned the intelligence of making such instructional changes. Principal Russell held firm with the intent of the differentiated practices professional development and asked the parents for patience as they made the changes.

What Happened at Culver Elementary?

Does this story seem familiar? This all too typical case requires us to consider these questions:

- Why was the change at Culver Elementary never fully actualized?
- What was going on in the culture of the school to be so resistant so quickly?
- What evidence did Ms. Russell have to assume things were going well?
- What evidence could she have collected to get a better feel for the changes?
- Why didn't the training result in actual ongoing implementation of the strategies?
- What support did the teachers need from Ms. Russell? What did they get?

Shirley Russell worked hard to implement differentiation at Culver Elementary School, and she had data to support the need. She followed what seemed to be a natural, seemingly logical path for leading the changes. Yet, in spite of her best efforts, this initiative fell flat as so many often do in our

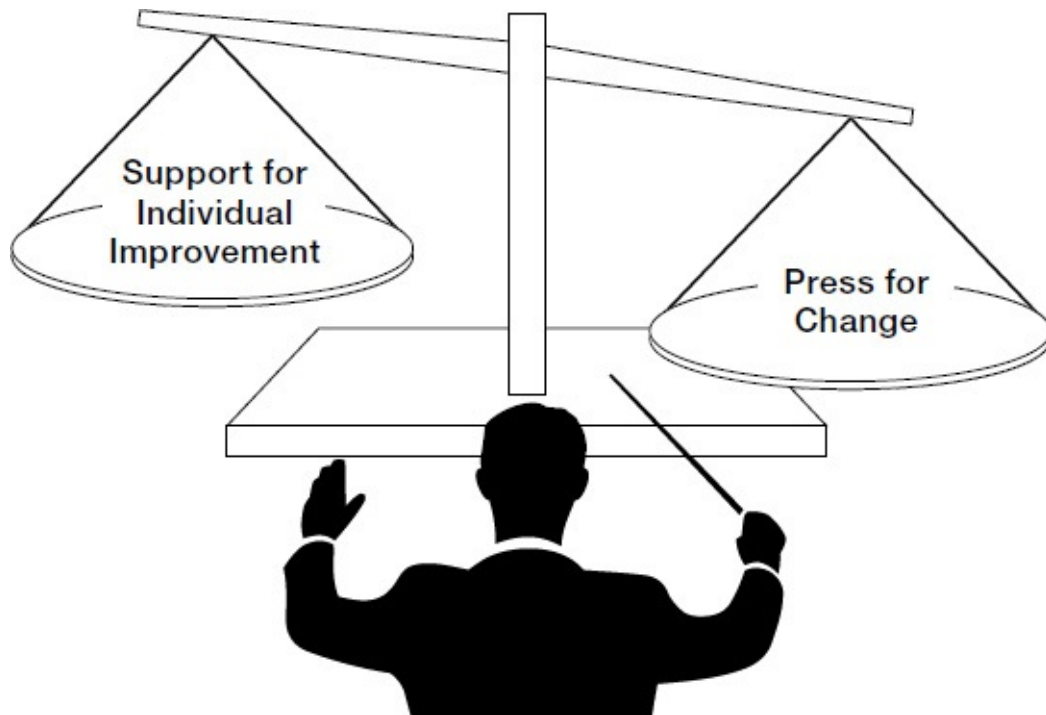
schools. She was never able to put together a system of support and responses to move the initiative forward, toward full, lasting implementation. Russell’s orchestration resulted in more “noise” than lasting, balanced music. This example illustrates the need for a different kind of leadership—a maestro’s orchestration of different elements, which together create a symphony of sustained improvement.

The word “orchestration” is meaningful to all of us who are dedicated to leading and facilitating school improvement. Central to the idea of orchestration is the concept of “masterminding”—the engineering, directing, arranging, and organizing of projects of significant merit. An artistic reading of the word reminds us that orchestration is highly correlated with the concept of “choreographing”—the conceiving, planning, and directing of a “dance” having multiple complex and synchronous components. If we take these ideas associated with the word *orchestration*, we learn much about our roles in nurturing, supporting, and demanding long-lasting change in our schools.

To be effective and efficient school leaders, we must view ourselves as orchestrating (masterminding and choreographing) improvement in our schools. Indeed, to orchestrate requires a maestro, someone who is an artist of considerable skill. This maestro must demonstrate artistry in choreographing the complexities of a major initiative and designing supportive efforts to keep the initiative alive and thriving as a communal effort. The maestro must, at the same time, show great skill in masterminding the day-to-day efforts to spotlight progress and improvement to all of the stakeholders in this community improvement. These two ideas are central to orchestrating change in schools. Therefore, if you find yourself in the middle of orchestrating numerous significant changes and critical initiatives for the benefit of students in your schools, this book is your resource. No matter the initiative, no matter the level—elementary, middle, or high school—any work, if it is worth doing, requires careful and thoughtful orchestration if it is to succeed.

Too many of our best school efforts fall apart during the first two years of implementation. This failure is not due to a lack of effort; rather, the failure is due to a lack of careful orchestration of efforts, balancing the press for change and the support for individual improvement, throughout the initiative’s new life until it becomes embedded into the culture of the school.

Figure 1.1 Imbalance of the Press for Change



An imbalance of the press for change and the support for individual improvement actually creates disequilibrium at the school (see [Figure 1.1](#)). Thus usually sending the message that tremendous, exhausting effort will probably only occur at the beginning of the change and that the changes are temporary. The predictable exhaustion results, then, in an abandonment of effort. Simply put, the orchestration is too tiresome and the demands of practice unreasonable at first. Seeing no alternative set of strategies and understanding a long history of approaching change in this way, the smart folks simply walk away from it and wait cautiously and cynically for the next “great idea.” Thus, our usual concert of school change is a short one, and the results are not met with thunderous applause.

While orchestration of change is complex, it *is* possible. Therefore, when considering or beginning any major change at a school, whether it be implementing new rigorous standards, creating differentiated classrooms, developing flexible scheduling for high school students such as modified blocks, or executing a balanced literacy design to rethink the teaching of reading at the elementary level, use this book to balance your efforts to orchestrate a full implementation of *your* initiative. Adapt the tools and frameworks in this book to provide evidence of the change. Practice the feedback frameworks to hold powerful and purposeful conversations about the change. Just as a maestro balances his or her approach to leading an orchestra, look at all of the instrumental work at the school and strategically facilitate the blending of your efforts throughout the concert of change.

Focus questions, notes, and measures for your orchestration of change

include:

What Are the Fundamental Ideas We Need to Be Thinking About? **Chapter Two** begins with an overall graphic framework of the content and tools of the book, providing a foundation for the leader as he or she continues to use the book as a resource for lasting change. The chapter also details what we know about orchestration—the idea that masterminding these changes requires relationship-rich collaboration with teachers. Using this chapter as a springboard into their work, leaders learn that working in concert with teachers requires a differentiated approach built on an understanding of teachers as people as well as professionals. These “lessons of change” undergird orchestration and must be contemplated at the beginning and throughout the work.

What Will Make My Actions Effective? **Chapter Three** examines critical decisions the leader must make in becoming knowledgeable about the initiative. In essence, the chapter asks two questions. The first question is “What are the big ideas behind this initiative, and what content must I master in order to continue to orchestrate a support system to ensure that the work goes forward?” The second question is “How do I continue to work with teachers to orchestrate this initiative when they know more about it than I do?”

How Do I Develop a Vision for This Initiative? **Chapter Four** explores the power and necessity of having a vision for the change being sought. This vision is different in scope and direction from the customary “vision statements.” A vision is needed for any initiative—a written picture or description of how things will be changed as a result of this particular work. This vision is vital if people are to be reminded of the moral purpose of the change as well as the progress they are making toward that vision. This chapter not only explores the rationale for the vision, but it also provides step-by-step processes for creating this vision for your initiative.

What Kinds of Conversations Should I Be Having about This Initiative? **Chapter Five** is all about the relationships built through the critical conversations leaders have with teachers every day. Central to this relationship is the idea of trust, how to build it and why it is so important when pressed for results. Leaders will also find the conversation frameworks and feedback strategies useful as they embed their daily management with these crucial, quick, and informal dialogues. This chapter also answers an important question, “How can I resist the urge to fix resistance and see resistance as constructive to my work?”

How Do I Develop Targeted Professional Development to Sustain the Initiative? **Chapter Six** is the maestro’s guide for continuous adult learning.

Designing powerful professional learning—informal and “just in time” to support the initiative—is essential to long-lasting results. Various designs and effective, inexpensive professional learning models enhance the maestro’s “baton” for continuing development of knowledge and skills to translate the initiative into practice.

How Do I Know if Anything Is Changing as a Result of This Work? **Chapter Seven** focuses on results. Using tools and strategies from a variety of sources and two evaluative frameworks, the leader meets evaluation head on with data and information to see if implementation of learning is occurring in classrooms and if teachers are routinely using the strategies and adapting their strategies to get even better student results.

Can I See an Example of This in Action? **Chapter Eight** offers the school leader an opportunity to see how all of the work fits within a case study. Through this real-life example, the leader can reflect on the strategic decisions that were made and how the concepts, tools, and frameworks in this book all unite to achieve lasting change.

You are not alone in the work. The vast majority of our colleagues are devoted to students and want to succeed. Those highly skilled and dedicated educators have great potential for shared leadership in your ranks. Yet, just like the maestro of an orchestra, your staff members need someone who leads the efforts. *You* are the conductor of these changes. Realize the potential of your initiatives, and revel in the idea that you were part of brilliant academic “music” filling your halls with the resounding notes of learning and change.

Questions for Consideration and Discussion

1. How do you respond to the idea of “orchestration?” Why?
2. When do you notice an imbalance between the artistry of change and the masterminding of change?
3. How do you try to achieve a balance between the press for change and the support for the people doing the work?



Chapter 2

What Are the Fundamental Ideas We Need to Be Thinking About?

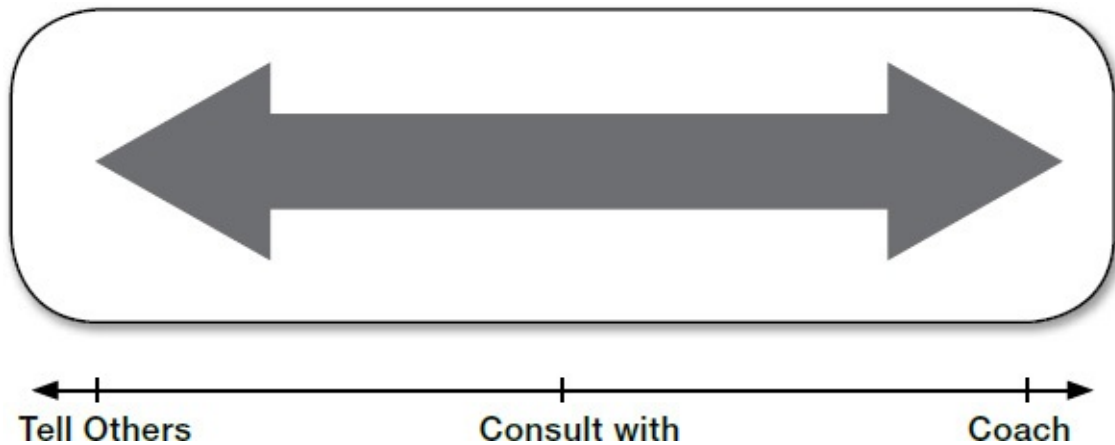
Remember the scenario from Chapter One? Shirley Russell was focused on results as she attempted to lead teachers to implement more differentiated instructional strategies. She trusted her faculty to begin trying out the strategies. Principal Russell spent a considerable amount of time in classrooms looking for the changes and engaging in conversations with individuals, pressing them to begin trying out the new ideas. Anyone could have seen that Ms. Russell was busy in her support of differentiation. In spite of these efforts, she did not witness success, and nothing really improved at the school. Some of the reasons may be in her approach to the change and how she balanced the factors that could have better orchestrated lasting improvements at Culver Elementary School. These factors, or fundamental ideas, are central to transforming our leadership.

Let's begin with reflective questions that examine the way we are presently doing things. These reflections include questions such as:

- How am I going about my daily business now?
- How am I attending to the most pressing initiatives in my school?
- What is the nature of my interactions with teachers regarding my most important initiatives? Why is this the case?
- What is my approach to day-to-day dilemmas?

These reflective questions uncover the way we prefer to work with initiatives and people. Frequently, our approach as leaders tends to fall along the continuum of leader behavioral preferences shown in [Figure 2.1](#).

Figure 2.1 The Maestro's Preferences Continuum



Consider your day-to-day approach to work and the people with whom you work. Too often, many of us try to lead by “telling,” essentially commanding others to follow our prescriptives. This preferred manner of getting things done causes us to be engulfed in daily tasks, many of them incredibly small and inconsequential. As a result, we are exhausted from working as hard as we possibly can and are astounded by the lack of results or at best, inconsistent results.

Some of us prefer a consultative style. We enjoy working with others and sharing our expertise, hoping to influence others into making more efficient and effective decisions about instruction. In essence, our job, as consulting leaders, is to convince others that our ideas are the best for them.

The problem with both telling and consulting methods is that they assume that the people with whom we are working are not as professional or knowledgeable as we are. When our job is to pull them toward better ideas, oftentimes our ideas for change are met with resistance.

Contrast these two methods with the coaching method. Leaders in the coaching world approach change as equals with the great majority of teachers and staff. The goal is for leaders to position ideas and actions, so they spark thinking among colleagues and decision-making about improvement. Coaching is not necessarily “soft.” Indeed, some of the most powerful coaching strategies hold the other parties much more accountable than the “telling” or “consulting” methods of leadership. Think about it. When you tell someone to get on board with a change, you may be exerting authority, but you are also doing most of the heavy lifting. Instead of holding the other person accountable for thinking and learning, you are only holding the person accountable for following your order, however nicely put or sincerely felt.

Central to the idea of coaching others are two fundamental ideas. They are exemplified in [Figure 2.2](#).

Figure 2.2 Relationships Plus Results Formula



This formula creates the foundation for our work. Deceptively simple, this formula provides the foundation for the effective school leader as he or she thinks about how to orchestrate the necessary school changes. What is required is what Deal and Peterson (2000) first called “bifocal vision.” The premise of a bifocal vision is that orchestrating change requires not only visionary thinking and management skill, but just as importantly, it requires ongoing professional relationships with others in the school to support the long-term motivation and commitment to the work. School change is exceedingly complex and requires these relationships to sustain it and to build a culture of “organizational citizenship” (Lewin and Regine 2000). This organizational citizenship promotes the feeling that we not only get a sense of accomplishment from successes in the work but also from the relationships that professionally feed us every day. What leaders will glean from this book, then, is this premium on the dual vision of leaders—building relationships while focusing on results and holding all accountable for the change. These ideas beg the question of all of us: *Are your daily actions both building relationships and focusing people on results?*

The leadership preferences continuum and the relationship plus results formula really demand that the effective maestro incorporate both as he or she makes individual decisions about how to work with each teacher at the school campus. In effect, these ideas are encouraging, and yet they demand that the maestro adopt a differentiated approach to working with the adults in the school. The complexity of knowing how to work with individual teachers may seem overwhelming, unless the maestro has a set of key concepts to construct a framework—a schema of sorts—for orchestrating the kinds of actions that will lead to sustained improvement. These key concepts, shown in [Figure 2.3](#), form the foundation for this book and the key elements for the leader to consider as he or she develops differentiated strategies for working with the adults in the school.

Figure 2.3 Orchestration: The School Leader’s Framework



The maestro, then, must consider these six elements simultaneously in thinking about leading the changes at his or her school. In addition, the leader must consider these elements in thinking about how each of his or her teachers is responding to the need for change, and adopt a differentiated approach to working with each individual or groups of individuals (Kise 2006). In other words, people really react in a personal way to the demand for change; just as in working with students, there is no one approach or pathway that works for all. It is important to remember that the vast majority of teachers want to do well at their school. Therefore, the differentiated approach to working with teachers may provide a more tailored and effective way of addressing how individuals are reacting to the changes. This allows the leader to better match actions with individual personalities to encourage teachers to make the next step toward institutionalizing the needed improvements, so they can continue to feel successful in contributing to a universally important cause—educating our students more effectively.

It is hard to coach others—building relationships while focusing on results—unless each of us as leaders operates from a schema that arrives at positive beliefs about teachers and staff and how successful they want to be. In

keeping with this reflective chapter, our next task is to ruthlessly examine our fundamental beliefs about the people with whom we work. The vast majority of teachers and school staff members are working as hard as they feel they can, and they want to experience success every day. While this basic premise may sound good to all of us (and we would never admit that we don't believe it), it is important at this point to examine these core beliefs. Consider the following and reflect on whether or not you strongly agree with each of the following beliefs.

Consider These Beliefs Before Continuing:

- ☞ Teachers are innately curious about their own knowledge and skills; they are willing to talk about what they know and what they want to learn to improve their skills.
- ☞ Teachers enjoy using practical information in reflective ways to think about and change their own classroom practices or to improve their own knowledge and skills.
- ☞ Teachers, under supportive conditions, can develop their own theories of what will work better for them in their classrooms, so their students achieve more.



If we fundamentally agree with each of these beliefs, it is next to impossible to approach orchestration of change from a “telling” point of view since that preferred set of behaviors undermines the kinds of relationships and daily actions mandated by these beliefs. In effect, these beliefs demand a more personalized approach with people, focusing on simultaneous relationship-building while holding all staff members accountable for continuous growth and improvement.

Finish your reflection on these big ideas by putting yourself to the test. For one or two days, make some notes about your own work in orchestrating change at your school or schools. You may want to reproduce [Figure 2.4](#) electronically and complete it over several days. Then, take stock of where you square with these beliefs about a) telling, b) consulting, c) coaching, and d) your beliefs about teachers.

Figure 2.4 My Orchestration Log

Contact	Nature of the Conversation or Action	Telling?	Some Telling?	Consulting?	Consulting and a Little Coaching?	Coaching?

For each critical action throughout the this process of reflection, log the primary contact and the nature of the action or conversation. Then, put yourself to the reflective test. If your overall behavior and tone was to tell the person what to do or accomplish, put an *X* in the telling column for that contact and action. Continue to log all of your major conversations and actions for the two days and put an *X* marking the best fit for your behavior and tone. Then, after two days of logging these actions and conversations, look at the patterns. What do you see? What does that say about your preferences and how you work with people? Do your actions and words project beliefs that you regret?

Thinking About the Nature of Your Interventions

This log, if completed, documents the variety of interventions the school leader has with other individuals in the school. We now know that effective school leadership often requires the maestro to intervene to increase the potential for the initiative to become more effective and long-lasting. Hall and Hord (2010, 105) describe the idea of intervention to be “any action or event that influences the individuals involved or expected to be involved in the process.” Therefore, in thinking about our framework for orchestrating change, the assumption is that leaders will first consider the six elements:

- Creating and managing the vision
- Keeping on track with targeted professional development
- Evaluating and interpreting progress
- Facilitating conversations with teachers about the work
- Maintaining fundamental knowledge about the initiative
- Understanding and anticipating the next changes

The leader will then consider “where his or her teachers are” in relation to the anticipated changes and provide differentiated interventions. Such interventions may include actions such as sending a new article supporting the initiative to selected teachers, discussing progress and next steps with a teacher, and personally gathering additional information about the nature of the initiative for personal development. What is important to remember is that the maestro is considering actions he or she must take in direct relationship to the initiative. In other words, the maestro does not set up conditions for the initiative to be successful and then sit on the sidelines and watch it unfold. We know that successful implementation requires daily attention to the initiative, deliberate actions on the leader’s part to move it forward and to keep progress steady toward institutionalization.

Interestingly, events are circumstances that happen outside the deliberation and intention of the maestro (Hall and Hord 2010, 106). The leader must also notice and consider these events that were not planned, yet influence the progress of the initiative. Examples of events include the following:

- Conflicts that erupt among teachers about the initiative that derail the momentum of planning
- A conversation that results, accidentally, in misconceptions about the initiative
- An opportunity for teachers to struggle with an implementation dilemma
- Unexpected positive results and immediate relationships with an outside consultant supporting the initiative

Events can have positive or hindering consequences in relation to the initiative. What is important is that the leader is aware of them and decides whether or not to intervene.

There is, then, a critical relationship of the initiative to the maestro. This relationship demands a consistent and regular review of the six critical elements of orchestration and calibrating possible interventions to the individual or individuals for targeted relationship building and results-focused success. This describes the essence of the philosophy of change that permeates this book. Consider these reflective questions as you dive into each element of the maestro’s collection of critical concepts:

Questions for Consideration and Discussion

1. What is your preferred style of working with people? Does it work? When does it backfire and why?
2. How do you react to the idea that rich relationships plus a results focus

equals successful change? Does this formula match with your actions? Why or why not?

3. Do you believe all interventions are created equal? Can you examine your interventions in the last week? How successful were they? How do you know?
4. Identify an example of an event that you would allow to happen in order to advance the initiative. Why is that important?
5. Why is it important for leaders to examine their philosophies about people and change before orchestrating and masterminding an initiative?



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