Organizational Change Management – Initial Findings

September 2023

Context

As part of the Organizational Change Management (OCM) process, the assigned OCM leader **conducted leader interviews**.

Why Interview?

- Identify issues of concern prior to the project progressing too far along

- Begin identifying key stakeholders impacted by the project

- Understand what messages might resonate around value proposition with various stakeholders

- Informs OCM approach, timeline and proposed outcomes

Process

- About 45 minutes in length

- To date 4 interviewees with 5 leaders across functional areas

- Also incorporated information attained from the kick-off

Outline of this Document

#	Topic
1	Context
2	What OPI is most excited about? (Potential Benefits of the Project)
3	What OPI is most concerned about? (Potential Risks and Concerns)
4	Initial Stakeholders and Assessment
5	About messaging
6	Initial brainstorm - communication channels
7	Cultural and contextual factors

What we know from research: Effective Implementation Strategies to Impact Student Achievement

✓
Current stage

STRATEGY 1: CREATE A CONTEXT CONDUCIVE TO CHANGE

STRATEGY 2: CREATE A SHARED VISION OF CHANGE (WHEN IDEALLY IMPLEMENTED)

STRATEGY 3: INVEST IN PROFESSIONAL LEARNING

STRATEGY 4: PLAN FOR IMPLEMENTATION & ALLOCATE RESOURCES

STRATEGY 5: MONITOR PROGRESS

STRATEGY 6: PROVIDE ONGOING SUPPORT

Hall, G.E., & Hord, S. M. (2019) *Implementing change: patterns, potholes, and principles (5th ed).*

OPI Perspectives on Potential Benefits of Project

Save Time of District and School Staff

- Streamlined data collections process for PowerSchool SIS districts
- Easier access to data needed for compliance, and supporting student success

More informed data decision making at all levels

- Data access and insights at the school, district, OPI and legislative levels to inform decision making and investments
- Ability to quickly view trends over time, such as chronic absenteeism, highlight success stories across the state and compare/contrast districts and schools

Modernized technology that is easier to secure and sustain over the long run

- Centralized data for easier access
- Robust data security
- Streamline and simplify applications

5

Other Key Benefits

Data Quality

- Currently, OPI cannot get live data access from PowerSchool SIS Districts.
- Having access allows OPI to catch data quality issues sooner (as they can with IC schools/districts).

OPI Data Requests –

- Currently, OPI cannot get live data access from PowerSchool SIS Districts.
- When data requests come to OPI researchers or analysts, they can get more up-to-date data from IC districts. Data reported from districts using PowerSchool or other solutions is typically outdated because these districts are only required to submit to IC State Edition at specific time intervals (not in real time).
- Also, having a robust publicly available set might eliminate data requests. Currently, in GEMS, it is difficult to export data for all districts.

Identifying Types of Challenges

According to the Adaptive Leadership work from Ronald Heifetz and Marty Linsky, one common problem that organizations face is not correctly identifying the kind of challenges that naturally surface during complex change (technical vs adaptive). Understanding the differences between the two can help leadership approach the challenges effectively and with the right perspective

Technical Challenges/Fixes		Adaptive Challenges
Solved by experts - either internal, external, or both	**Stakeholders Involved**	Solved by stakeholders; Changes occur in values, beliefs, behavior, roles, relationships, & approaches to work
Solutions can be implemented quickly — often by edict, decree, or mandate	**Time & Implementation Involved**	Implementation of these solutions often take significant time & cannot be done by edict
•PROBLEM SOLVER: The leader can solve or delegate issues to experts to solve •Focus on SOLUTION	**Role of Leader or Authority and Focus**	• CONVENER & COMMUNICATOR: The leader's role is to bring people together to do the work of solving it together • Focus on PROCESS
• INFORMATIVE Learning: Learning that introduces new ideas, skills & content (e.g. Training) • Basic Perception of self & world remains relatively the same; feels familiar	**Learning Required & Comfort Level**	• TRANSFORMATIVE Learning: Learning that is focused on changing whole mind, perspective, perception, and orientation • Feels unfamiliar, outside of comfort zone, risky

7

OPI Perspectives - Adaptive Challenges

- **Securing buy-in from smaller districts –** need to communicate value smaller districts will gain from this project.

- **Requests from OPI that require a change in behavior, work or routine of districts -** Coordinating with districts on technical details (resetting passwords, changing URLs, etc.) or having to put data in a new format. These will take time at minimum and may be met with some resistance by some districts (if they are not bought in).

- **Parent community that is highly protective of their student's data.** Data access might sound threatening. Even if data sharing agreements are legal, there may still be concerns. *(It will be critical to highlight the robust security of the solution and embody strong data governance).*

- **Turnover, trust and building relationships:** Like many educational entities, there has been turnover at OPI. There has been some loss of institutional knowledge and districts are establishing trust with OPI staff.

"72% of our schools have less than 100 students. Most of these districts don't have tech staff. We need to show real life examples of what value this will show."

"We have a school where the teacher is the principal and also the bus driver. Unique stuff like this can make it harder to implement. The value must be worth the benefit."

8

OPI Perspectives - Adaptive Challenges

- **District's taking time to submit high quality data:** LEAs do not always report accurately within their SIS. They do not see the value in spending time to report data as they already know what's going in their school building (often less than 100 students)

- **Sustainability of the project** – is there funding to secure the project over the long run once ESSER runs out?

- **Ensuring academic/instructional side of OPI are engaged –** for the project to be successful, dashboards will need to be used and ideally embedded into educational routines and processes of schools. The instructional side of OPI may have more access to these processes and the educators connected to them. This is a highly influential stakeholder group and their engagement is critical.

"Initially modernization meant updating and consolidation of homegrown applications. This project is very different from that."

"Almost none of the OPI staff know much about this project."

OPI Perspectives on Other Challenges

The following came up during interviews as key technical challenges.

- **More clarity needed around legal ramifications of data sharing** (between PS, OPI, LEAs).

- **Connection with Infinite Campus**

- **Integrating with other agencies:** When working with other agencies, such as DLI, there may be challenges. They use social security ID as unique identifier. Concern that the "fuzzy match" process won't work. Commissioner's Office uses Oracle Cloud, which has made it harder for OPI. *Note: scope of this project does not include connections to other agencies*.

- **Connectivity can be a challenge in some parts of Montana**

The Do's and Don'ts

Do this...

- ✓ Lead with the interest of Montana student interests first and foremost

- ✓ Lead with the value that the project will bring to districts and the students they serve.

- ✓ Key messages should be communicated by trusted individuals (likely within OPI or Montana)

- ✓ Find ways to embed the use of the platform into daily routines or existing work

- ✓ Streamline work of LEAs

Don't do this..

- ✗ Don't lead with technology nor with a specific vendor or vendor product

- ✗ Don't promote a specific solution or vendor or imply that one district or entity must change vendors

- ✗ Key messages should not be communicated from "outsiders" or those not known or trusted by districts

- ✗ Don't position the new solution as a new thing

- ✗ Don't ask LEAs to do something that can be done at the central level

Critical and/or Influential Stakeholders – Initial Brainstorm

- Data Staff (GEMS, Data Ops and AIMs)
  - Staff know very little about the project
  - Many equated "modernization" with the consolidation and updating of homegrown applications and not with COTS solutions like Unified Insights and Connected Intelligence
  - Most of this group has not seen a demo of the product or presentation of project goals
- OPI IT Staff
- Districts
- Further segmentation might include those who use PS SIS vs. IC vs. others; small, medium and large
  - District staff: IT/data focused, leadership focused, academic focused
- Parents / PTA
  - Critical to child's educational success
  - Note: have ability to sign off on whether their child's data is shared or not
- OPI instructional/program/academic leadership
  - If the project is to be successful, dashboards will need to be used and ideally embedded into educational routines and processes of schools.
  - The instructional side of OPI may have more access to these processes and the educators connected to them.
- Legislators
  - They may be key to the long-term sustainability of the project in terms of funding

Possible communication channels – Initial Brainstorm

- Data Team meetings
- Montana Association of School Boards (to get to districts)
- Montana Council of Educational Leadership
- Montana School Business Officials
- K12 Data Task Force
- K12 Data Modernization webpage
- Special Education Task Force
- "In the Know" Lunch sessions
- PowerSchool User Group
- SIS OPI staff member how manages connection with IC districts

Top Cultural & Contextual Factors

Contextual and Culture Factors that Will Affect Implementation

Culture of Local Autonomy

Why this Matters?

Recommendations that require uniformity or consistent process across the school systems may be met with resistance. Change management will be needed in these cases.

Montana Solution for Montana Students

Why this Matters?

Recommendations that are espoused by Montana leadership, not outsiders, will gain significantly more traction.