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CHANGING A SCHOOL ORGANIZATION: A PRIVATE SCHOOL CASE STUDY

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Abstract

This paper focuses on the main results of an organizational diagnosis aimed to identify the needs for a planned change intervention in a school based on a private charitable organization.

Because an organizational diagnosis is a complex process, the choice of a theoretical model is critical, as it determines the type of information to be collected; it guides the interpretation of that information, and defines the course of action. In this project, we have taken Nadler and Tushman's Organizational Congruence Model [1] as a basic guideline. This model assumes the organization as a whole system, whose performance is contingent on the congruent adjustment level between their primary components.

Therefore, we searched for incongruent sources, with special focus on the strategy and the fitness of the processes under internal and external environment pressure and demands. In order to get a wider vision of the organization, we carried out an organizational diagnosis using methodological triangulation, with qualitative and quantitative procedures. Following an action-research methodological framework, results of data analysis were debated with the participants and the school director. Data collection started by analysing the school documentation, followed by individual interviews with the school director and general director. Subsequently, questionnaires intended to assess the organizational culture were applied to the school staff (teachers and school assistants). A focus group was also carried out to understand the way the individuals respond to each other's perceptions and how they construct shared meaning. The use of this method also served to involve the organizational members in the change process. Finally, an adapted force-field analysis has been conducted to enhance the participants' willingness and commitment to the change process and to mitigate the resistance associated to it.

Results show that a perceived need for change exists. Specifically, participants' wish for a clearer school strategy aligned with the mission of the organization in which it is integrated. Moreover, results indicate the need for organizational changes towards a more appropriate resource distribution, a non-bureaucratic culture that may foster potential innovation, the implementation of a regular practice of feedback on work practices, and the enhancement of the organizational communication between departments. As orientation for change, we recommend an incremental change process, based on a cooperative thinking approach on the strategy and objectives of the school, and using the current review of the school main documents as a chance to redefine the management strategy. Furthermore, effective ways to assess and publicize school outcomes, and a systematic practice of performance assessment are also needed.

Keywords: Organizational Change, Organizational Diagnosis, Action Research, Organizational Congruence Model, Educational Management and Administration.

Due to contextual demands, organizations face the constant need to adjust and adapt in order to maintain their stability. School organizations are not an exception and have to answer to these demands to guarantee their quality, efficacy and sustainability. Very little literature has addressed the school as organizations. However, analysing the educational environment from an organizational point of view could allow a better understanding on why school organizations change and how they strive for educational efficiency

The object of this project is a private school based on a private charitable organization that exists for over 45 years, in which we searched for the needs and to propose orientations for organizational change by analysing the current operating way. We consider a planned and systemic change perspective, using Nadler and Tushman's Organizational Congruence Model (OCM) [1] as a basic guideline, attending to the specificities of change in a school organization context.

1.1 Project objectives

On a systemic approach all organizational areas are interdependent [2][3] so the focus can be put on one or several areas of the organizational dynamics. In this case, we chose the organizational social system, the goals and mission, the surrounding environment, the structure, and the processes. These are the crucial areas on a school organization [4]. Consequently, this study was also guided by the following purposes: survey the congruence between the organization mission, strategy and processes; understand the adequacy of the current operating taking into account the characteristics of organization and the vicissitudes of the environment; frame attainable intervention proposals to keep quality levels in order to guarantee the organizational sustainable development.

As the organizational diagnose is in itself an intervention [5] and a change exercise [6], the thinking and learning resulting from an organizational diagnose prepares to the changes observed in the environment [2][7]. Thus, we aimed to contribute to a culture of reflection and learning in this school, which stimulates innovation and assures a better adaptation response to internal and external demands.

2 CONCEPTUAL FRAMING

2.1 Change in organizations

Generically, the process of change involves the notion of an equilibrium interrupted by a disequilibrium that conducts again to stability. This notion has its origin in the Lewin's [8] three stages planned change model: unfreeze, change, and freeze. This model highlight that change can be divided in phases in which different change mechanisms have to be managed [2][3][7][8][9][10][11][12]. Because organizations are open social systems and complex and dynamic organisms, with interrelated and interdependent elements, the intrinsic dynamics of each organization and its relations with the environment triggers the need for change [1][2][13].

2.1.1 Types of organizational change

Organizational change can vary according to its nature, goals, purpose, type, and the way it starts. It also implies consequences on individuals, groups, organizations and environment [3][10][14].

The change process can be classified for the unit (singular or multiple, as it refers to one or several organizations) or the way change starts (prescribed or constructed, as it is imposed or results on the organization elements movements) [3][9][10][15]. Organizational changes also vary on the way it occurs. It is of first order if its aims are operational and do not bring alterations to the organizational as an all. Second order changes require profound transformations on strategy, structure or functioning patterns [3][10][11][16]. Regarding the category of change, it can be planned (implies planning, and needs stability and time to go through the various stages of change) or unplanned (when it is reactive and immediate, responding to external pressures). Planned change allows a better, effective and well-adjusted response to the environmental changes [3][17]. Thus, combining both order and category criteria, Porras and Robertson [18] outline four types of organizational change: incremental (first order and planned); transformational (second order and planned); evolutionary (first order and unplanned); revolutionary (second order and unplanned).

To sum up, the type of change suggested in this project is incremental, since it is planned and the proposed alterations do not threat the foundation premises of the organization. Several studies have pointed out this type of organizational change as being a powerful support for organizational development and efficacy [3][16][19].

2.2 Change in school organizations

There are few studies on schools as organizations, and the literature on change in schools is even more uncommon [20][21]. The causes and the need for a change in school organizations can range from a need to promote competencies that allow students to compete in a global economy to a need to reduce costs [4][22][23][24]. The goals can be structural, strategic, behavioral, and procedural, so are similar to change objectives in any other type or organization. That illustrates the assertion that an effective school organization should have equilibrium between its interdependent elements [4]. This equilibrium should be directed to improve the organizational effectiveness, in short term, and to promote an organizational context where improvement happens naturally and continuously [4][25].

2.2.1 Business perspective in school organizations

Corporate language in schools is becoming more noticeable with the use of expressions such as “clients”, “strategic management”, or “benchmarking”. It usually reveals a framework for action [24][26]. The idea of *strategy*, which is crucial in the OCM realm, has an important role in school organizations, as it implies a clear notion of future direction and requires schools to define their mission, vision, values, goals and procedures [25]. It involves an environmental assessment, benchmarking, and a shared a vision. For instance, *quality management*, supporting a business rationale to school management, leads to emphasize areas such as reduction of costs and waste, enhancing training quality, extensive client consultation in order to answer to their needs and expectations, adjusting the staff selection and even the student selection [26].

2.2.2 Public and private school organizations

There are no significant differences between public and private schools regarding change and innovation, but private schools, as they are often market oriented, tend to have a more defined innovation orientation. Nonetheless, it is not certain that private schools are more innovative than public schools. Some practices in private schools, such as selectivity and structural characteristics, may cause inflexibility concerning innovative action. But they can allow an easier implementation of innovation as private schools tend to have more personalized and direct leadership procedures [20]. Regardless of being a public or private school, several authors value the view of schools and its management processes as organizations, reinforcing the effects of the management practices on student and teachers performance, and on school outcomes [4][22][23][27][28][29][30][31].

To sum up, despite the school organizations specificities compared to other types of organizations, the contribution or organizational research should be considered when studying schools, since there is no conceptual framework for studying organizations and organizational behavior that cannot be applied to schools [32].

2.3 Planned change and organizational diagnosis

The planned organizational change includes three different phases: diagnosis; action or intervention, and assessment [3][19][33]. In this paper we are focused on the diagnosis phase in which problems, needs and solutions are identified. The diagnosis target can be one or several areas of the organizational dynamics, as all areas are interdependent [3][19], and it can be remedial (when it tries to find problems and solutions) or developmental (when searching for ways to get the organization stronger and well succeeded [34].

As it is a complex process, choosing a theoretical model to frame the organizational diagnosis is critical. It will determine the type of information to be collected, guides the interpretation of that information, and defines the course of action [1][2][7][13][35]. In this project, we rely on the Nadler and Tushman’s Organizational Congruence Model [1].

2.3.1 Organizational Congruence Model

The OCM assumes the organization as a whole system, whose performance is contingent on the congruent adjustment level between its primary components, and is influenced and influences the environment [35]. Thus, stressing the role of interdependency of an open system, this model focuses on the transformation processes that convert inputs into outputs [1][13]. There are four categories of inputs, each one affecting the organization in a different way: *environment*, i.e., the people, other organizations, economic, social and legal constraints; *resources*, such as employees, technology, capital, information, position in the market; *history*, that influences the way it functions on the present; *strategy*, i.e., the decisions made facing its resources and environmental demands, considering its history [1][13].

The outputs are what the organization produces, not only the final products or services, but also the individual and group performance within the organization. Therefore, it is important to know if the strategy allows meeting the goals, how the resources are used by the organization in achieving those goals, and to understand the way the organization positions itself to harness new opportunities and defend from threats [1][13]. The transformation process is the core of OCM, resulting from the inputs and leading the production of outputs. It has four basic components: *work*, or the basic tasks; *individual characteristics* of the people who do the work, their knowledge, skills and behavior patterns; *formal characteristics* of the organizations, such as formally defined process and methods to individuals do the work; *informal characteristics* of the organization, i.e., the implicit guidelines that

influence the individual and group behavior, such as values, culture and politics [1][13]. To undertake a diagnosis based on OCM, Nadler and Tushman suggest the following steps: identify the symptoms; define the inputs; define the outputs; identify the problems; describe the organizational components; assessing the congruence between the different components analysing data collected in the previous step; find some hypothesis on the problems causes. At last, it's necessary to identify the next steps – to choose a strategy, implementing it and assessing its impact, and, depending on the outcome, predict the consequences or collect new data [1][13]. These are typical steps of a planned change.

3 DIAGNOSIS: METHODOLOGY, SAMPLE AND PROCEDURES

This organizational diagnosis used methodological triangulation, through qualitative and quantitative procedures, based on action-research methodology, which implies that the results of data analysis were debated with the participants. These data collection took place between May and November 2011 and started by analyzing the school policy documents (and of the private charitable organization which the school is part) from 2005 to 2010.

3.1 Individual interviews

The first interviews were conducted with the school principal (SP) and the general director (GD). Firstly due to the need to understand the organizations as a whole, secondly to integrate these elements from the beginning, since the intervention's initiative came from the researchers. These were structured interviews built with the purpose of data collection on the different organization components, based on the OCM, but also to deal with the doubts which arose from the policy documents analysis and observations. The interviews were then entirely transcribed and subjected to content analysis.

3.2 Questionnaire

Because there were no data on the school organizational culture and to assess the organization social system, a questionnaire was applied to all teachers and school assistants. We used an instrument, adapted by Ferreira e Martinez [7], to analyze the organizational culture, based on the Competing Values Framework [36] which considers four organizational culture dimensions: Clan, Adhocracy, Bureaucracy, Market [37]. It includes 24 items and answers are systematized in a 1 to 7 Likert scale, where 1 is *very rarely* and 7 *very often*.

We collected 117 questionnaires, 64,3% on a universe of 182. 52.1% of participants are teachers and 47,9% other school assistants, 90,6% are women. Ages range from 18 to 68 years old, average age of 34.76 years old (SD=10.17). The average organizational tenure is 10.29 years (SD=7.2), ranging from 1 to 33 years. Regarding the education level, more than a half of the participants had a university degree (51.28%), and secondary (17.09%) or professional education (12.82%).

3.3 Group Interviews

Group structured interviews with focus group has been undertaken in order to understand how group members discuss a subject, respond to each other's perceptions and build a shared meaning [38][39]. Because the group behavior should be a relevant focus of change [8], it is necessary to actively include group members in the change process for it to succeed [40]. So, five group interviews were carried out, with total 31 participants recruited among coordinators, teachers and school assistants, divided into four groups with 6 elements and one with 7 members. These groups were homogeneous in terms of duties and responsibilities, reasonably representing a wide spectrum of experiences and opinions, and were organized according to the suggestions on group size and the requirement to have a direct involvement with the subject [38][39].

The structured interviews included questions about the organizational components considered by OCM, but also the intervenient perceptions on the organization singularity, and on the degree of consistency between the school and the social charitable organization it is part of, as well as the strengths, weaknesses, and threats from the environmental and change viewpoints.

3.4 Force field analysis

Finally, we developed an adaptation of force field analysis with the same participants in group interviews. As Krueger [41] suggests, we observed that the findings, insights and learning from the first focus group were important to the follow up, because it allowed the confirmation of perceptions.

In a first step, a few hours before the meeting, a task description and tables referring to each step was handed to every elements of the group. They were asked to identify at least three problems of the school. On the second step, with the entire group reunited, three sub-groups were created. On the third step, they discussed the problems previously identified and they mentioned the more significant ones. In the next step, each of the group members searches for individual suggestions to solve the problems. Then, working in small groups again, they discussed these solutions. In the sixth step, the entire group had the opportunity to share and discuss the solutions found in the previous stage. Later, the problems and the solutions which were suggested in the different sub-groups were analyzed and systematized through a questionnaire in order to assess the importance, priority, and applicability. All the participants of force field analysis responded to these questionnaires.

4 DIAGNOSIS: RESULTS

The presentation of results follows the analytic elements that derived from the OCM model: the inputs, the strategy, the transformation process, and the outputs. The changes that occurred in recent years and the change intentions in the organization are also described. At last, results concerning problems and solutions obtained through force field analysis are presented.

4.1 Inputs

4.1.1 History

This school is part of a private charitable organization, whose origin relies on the answer to the community needs, more than 45 years ago. Throughout its history, the areas of action of this private charitable organization have increased, and now, in addition to education, there are also responses on social emergency, health, and support to the elderly and social intervention. It was the first Portuguese college to have a quality certification and its educational project had been recognized with several awards.

4.1.2 Resources

In this school organization education is divided into several levels including nursery school, pre-school, primary education, lower secondary. The number of students has a positive increase, from 1477 in 2005 to 1744 in 2010. It has 93 teachers and 89 school assistants. As distinctive features, all the participants have referred to the social action, which allows the school population heterogeneity. Other distinctive features include the diversity of curricular and non-curricular activities, the education quality shown by the school rankings qualification, the quality certification, and the human resources characteristics.

4.1.3 Environment

Participants mentioned the school location near the capital city, nearby new neighbourhoods with potential new students, and the conviction that the parents will still invest in their children education even in an economic crisis context as positive aspects to the organization. As threats, participants mentions a nearby monthly fee free college and the restoration of the surrounding public schools, as well as the economic difficulties resulting from the economic crisis. Considering the historical and environmental framing of this school, we infer a tendency to grow as a response to the environmental demands in a reactive way, i.e., there is no systematic monitoring of the environment or of the answers given.

4.2 Mission and Strategy

The school and the private charitable organization share the same mission – “To support the effective development of the community, specially its more vulnerable groups, trough offering better services, towards its improving quality of live.” It is noticeable that the school growth and its incomes ensure the continuity of the private charitable organization. We have identified defensive strategy, where even facing the environmental solicitations, there are a careful consideration in what investment opportunities and financial return concerns. It is not clear how the adaptations to the environmental changes are made. Considering the OCM, some ambiguity was found among the participants answers. On the one hand, the economic needs and referring to students and their parents as clients, points to a market orientation. On the other hand, the school, being a fundamental part of the private charitable organization, it is a vehicle for supporting families with low incomes and school population

heterogeneity. This situation is dubious to the teachers and school staff participants. Even though they feel a distance of this school regarding the main purpose of the private charitable organization, the school social response is exalted by all participants of force field analysis.

4.3 Transformation process

4.3.1 Informal Organization – organizational culture

Mean and standard deviation were analysed for each cultural dimension (Cronbach's Alpha vary from .79 and .89). Because answers revealed an approximation to the mid values of the scale, a *t* test was performed to analyze each factor relation with the midpoint and the immediately superior point (values 4 and 5, respectively, on a 1 to 7 scale). The Bureaucratic cultural dimension (M=5.07; SD=.86) stands above the immediately superior point to the midpoint of the scale, $t(112) = .88; p < .383$, being the only assessed dimension of organizational culture where this is shown, without significant differences.

To understand the possible influence of the task performed (teacher or school staff) and school educational levels (where the task is performed) on the culture dimension perception, *t* tests and one way ANOVA were performed. It is on Bureaucratic dimension that teachers (M=5.23; SD=.75) and school staff (M=4.89; SD=.94) show less expressive difference of perspectives ($t(98,66) = 2.15; p < .034$), as it might indicate a greater consensus among task performed and the Bureaucratic cultural dimension. Differences are also found according to school educational levels in the Bureaucratic culture dimension ($F(3,109) = 4.88; p < .003$), being more evidently perceived in the primary education school level (M=5.44; SD=.70) and in pre-school (M=5.17; SD=.84).

4.3.2 Formal organization – organizational structure

The school organogram shows a functional structure as the tasks are grouped by function, as well as some vertical complexity given the large number of hierarchical levels. This type of structure is adapted to stable environments, has centralized control processes, communication tends to be vertical and has high levels of technical specialization. The SP refers the need to change the school structure, suggesting a transversal coordination as a way to promote the flow between the school several educational levels.

4.3.3 Work and Individual

Some of the tasks descriptions are mentioned on the quality manual. However, the assessment of the individual competences and their adequacy to the tasks characteristics do not go through formalized processes. The teachers work is ordered differently according to the educational level they teach. There is a representative teacher in each team that articulates with the respective coordinator, whose selection varies from one educational level to another, with no standardized criteria, going from alternation to political trust. Teachers performance appraisal is formalized but takes place irregularly. There is no formal performance appraisal of school assistants and the task distribution depends on the educational level they operate.

4.4 Outputs

On products concern, SP and GD underpin the scholar results and the global development of the students, stimulated by the diversify activities the school offers. The recipients of the school action, considered "clients", are the students and their families. The coordinators answers also reflect this view. The teachers and school assistants interviewed referred unanimously the comprehensive education, the values and citizenship the school provides and the close contact to students and their families. With the implementation of the quality system, the client satisfaction assessment was systematized. Sometimes the school answer parents solicitations that has to do with teachers work, has the SP refers "*in this occasions we don't tend to respect the teachers corporate interests*". On what students results are concerned, there is a secretariat that does the inventories on internal and external standardized tests, although the coordinators refer the need to analyze and defined improvement strategies.

4.5 Changes implemented in recent years

On a system activity regulation level, the introduction of the quality system was a planned change, led by external consultants. On a structural level, the last change dates from 1998, when the private

charitable organization this school is based on had a strategic study carried on by external consultants. From that study come the suggestion to departmentalise the private charitable organization and the introduction of hierarchical levels in the school organogram. The other changes are perceived as non-planned and took place on technological equipment level, improvement actions of school building, and on teacher training. Just as there is no analysis on the changes needs, the results from the changes made are not assessed.

4.6 Identification of problems and solutions suggestions resulting from force field analysis

Most of the problems and solutions suggested have been repeated in the different groups, although these groups had members from all school educational levels, with different tasks and with different responsibilities levels. That might suggest an agreement on the change need and, therefore, corroborate the need to implementing change.

The *problems* referred by all groups state to resources, strategy and process: the perception of an *inexistent shared vision and a clear strategy* (which conditions the possibility of congruence between the strategy, the transformations process and the efficacy achievement); a *mismatch between resources-process and resources-objectives*; *communication difficulties* (increased by its structure compartmentalized in educational levels); the *organizational culture identified as bureaucratic* (and the excessive bureaucracy acknowledged as a problem does not enhance, and can even difficult, innovation processes).

It was asked the participants to formulate possible *solutions* to each of the identified problems. By analysing these suggestions, we observed that those considered more crucial solutions pointed to: *resources* (e.g., "Channelling the organization education funds to acquire technology and educational equipment that suits the current demands"); *strategy* (e.g., "Clarify the school perspective on what inclusive school is concerned vs. school results and apply them when admitting new students"); *work and individual* (e.g., "Implementing an annual performance assessment to school assistants, with the partnership of each coordination, trough self and hetero-assessment, considering the training needs"); *formal organization* (e.g. "Facilitate regular meetings between teachers from consecutive educational levels, with the aim of best knowing the students, the topics covered, to avoid subject repetitions and adequate pedagogical practices"). By analysing the driving and restraining *forces* facing these solutions, the participants identify themselves as restraining elements to change, as the facilitating locus of change is largely identified on those with decision making power, such as coordinators, principal and director.

5 CHANGE ORIENTATIONS

From the diagnosis results, the needs for change derive from the incongruences found on the inputs (namely scanning the environment and the strategy definition), on the process (individuals who do the work and formal aspects of the organization) and outputs (monitoring the results and how the organizational resources are used to achieve the goals). If part of the identified problems shows the need to clarify vision, strategy and school goals, a clear definition of a school mission can contribute to dispel this ambiguity. Therefore, it seems clear the need to establish a global school culture as well as shared values that should be discussed by all school members.

Also the current revision on the school policy documents must be an opportunity to promote the involvement of the different actor on the school context. This documents school should be faced as management tools that reflect the school strategy, should be coherent among then and have objectives that can be assessed.

Once we found a propensity to an organizational growth as a reactive answer to the environmental demands, it is necessary to monitoring the environment regularly and in a planned way applying, for instance, questionnaires to parents and making a careful informed assessment of its results.

The lack of performance assessment of teachers and school assistants was stressed by them on focus group and force field analysis. To encourage a better work-employee adjustment and enrichment, it is necessary to deem the importance of a regular performance assessment for teachers, coordinators and school assistants. This performance assessment ought to have clear objectives, procedures, dimensions considered and instruments. Reformulating a performance assessment system requires careful planning and often the backing of external consultants [42].

Because the private charitable organization this school based on is a member of national and international entities, such as Eurochild or Iberian Network of Civic and Communitarian Foundations, it is important to use these networks as a way to promote this school outside regional and national scope. It is also important to strengthen partnerships with companies, universities and similar schools, as a way to share good practice, training and benchmarking. And to publicize national and internationally, near specialized public, in conferences and fairs, the work of the school, with special emphasis on its differentiation and specialization.

6 CONCLUSIONS

Through the lens of OCM we have identified some possible organizational incongruences. The change suggestions stress the need for the school to consider itself as open system, which efficiency and efficacy depend on the existence of a solid strategic vision, built on a careful examination of the present [43]. That requires the implementation of a participated, systematic and prospective practice of auto-analysis. By doing that, we believe that the school will do more than just respond to the environmental demands, it will be consolidating itself as learning organization.

The school identity is very often mixed up with the organization to which it belongs, both internally and externally. However, it seems there has been a separation between their purposes. Can this school be oriented by a business logic and still maintain the stress on the social responsibility and on the heterogeneity of its public?

This study was developed by a worker of the private charitable organization, where the analyzed school is based. That fact might have allowed an enriched data collection, but it also could have been a source of bias. It is also a limitation to this study the impossibility to compare the results with similar studies, once it is scarce the literature on the subject, thus the need to continue this type of studies and perhaps create diagnosis, change and change assessment practices considering the school organizations specificity.

Finally, we hope that this study may be a contribution to implement in this particular school a culture of reflexive thinking, learning and continuous innovation, as a way to guarantee a better adaptation to the internal and external context, and to ensure the continuity and sustainability of this school on a long-term.

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