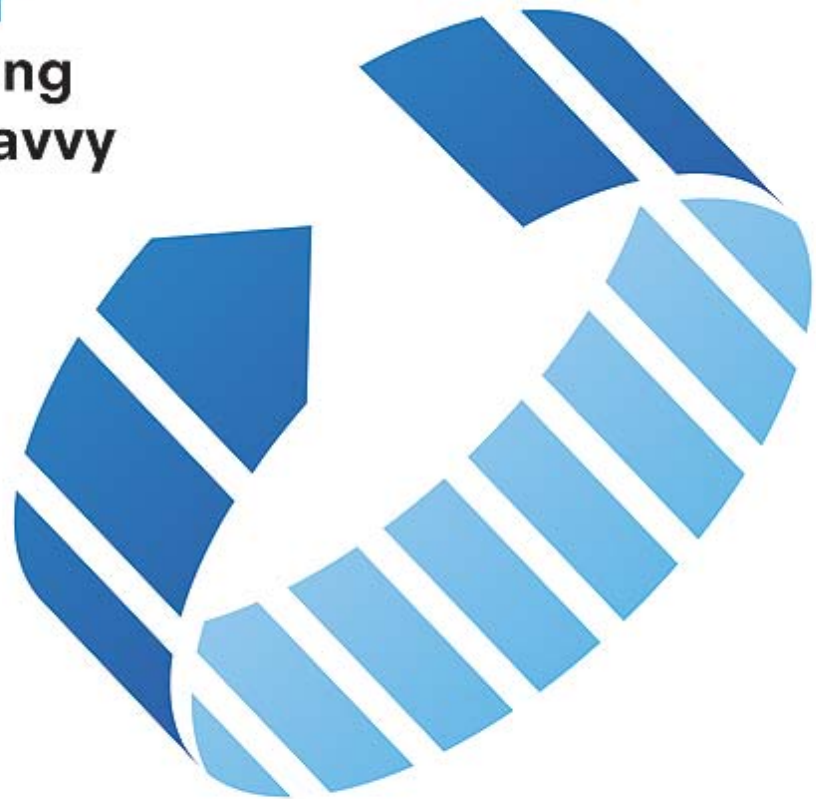


MICHAEL FULLAN

MOTION

LEADERSHIP

THE SKINNY
on Becoming
Change Savvy



A JOINT PUBLICATION



Please feel free to reproduce and use the material in this booklet with your staff and others. The important thing is that you actually try out the ideas in a purposeful manner and build your knowledge through cumulative, reflective practice.

2010

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Welcome to the workshop.
We hope you have an enjoyable time.

PARTICIPANTS WILL LEARN:

- What change savvy practitioners are doing to make whole system reform
- How to make change less complex and more powerful in its impact
- Key insights from other practitioners via video showing how motion leaders work to get substantial improvement

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OVERVIEW

This workshop focuses on the new implementation work beyond the *Six Secrets of Change*. It introduces some of the key concepts from the book *Motion Leadership: The Skinny on Becoming Change Savvy* (Corwin, November, 2009). The idea of ‘the skinny’ is to boil down the essence of change into the smallest number of key, high yield factors that have high impact on student and teacher engagement and learning. The goal is to a) increase the speed of quality change, and b) to achieve large-scale or whole system reform.

In terms of the skinny we sometimes call this high yield set of factors ‘simplicity’ which is to identify the smallest number of powerful factors that make a difference—less than complex, but not overly simple.

The workshop does not cover the skinny in its entirety but rather is an introduction. The book itself shows more examples of the skinny in action. We are also developing ‘Motion Leadership: The Movie’ that shows actual film-based situations of motion leadership in action. The ‘movie’ will be available online in the spring of 2010 (through PD360).

Key New Watchwords

- Motion leadership
- From practice to theory
- Take the mystery out of complexity
- The speed of quality change
- Instruction drives data
- Whole system reform
- The skinny

The Chunks

- Ready-Fire-Aim: Change Savvy
- The Instructional Core
- Love, Trust, and Resistance

For those wanting to delve deeper into the ideas, we have captured this growing knowledge base in several recent publications:

Leading in a Culture of Change (2001)

- Focuses on what successful education and business leaders have in common.

The Moral Imperative of School Leadership (2003)

- Identifies school leadership as the key force for reform through the moral imperative of making a difference in students' and teachers' lives, as well as making a difference at the school, district, and societal levels.

Leadership and Sustainability: System Thinkers in Action (2005)

- Identifies eight core elements of sustainability, and shows how leadership at the school, district and system level can work towards embedding these eight elements.

Turnaround Leadership (2006)

- Shows limitation of focusing on a small part of the bigger problem, and instead makes the case for transforming all schools. Based on closing the income and education gap in societies, the book demonstrates the social consequences of not focusing on closing the gap of high and low achievement, and presents specific ideas and successful case studies for success.

Breakthrough (2006)

- Argues that the new standard for schools in the 21st century needs to be 90%+ success (for example, in literacy proficiency) not 70 or 75%. Breakthrough documents the limitation of present strategies, and then builds a system for 'data-driven instruction'. It shows what the elements of such a system are and how to link them together.

The New Meaning of Educational Change, 4th Ed. (2007)

- This is the basic textbook and covers all phases of the change process and all roles.

The Six Secrets of Change (2008)

- Essential lessons for leaders to survive and thrive in today's complex environment.

What's Worth Fighting For in the Principalship? Second Edition (2008)

- Characterizes the current state of the principals and recommends six practical, powerful action guidelines for principals and six guidelines for systems.

Motion Leadership: The Skinny on Becoming Change Savvy (2009)

- Focused on making change less complex and more powerful, this concise book provides the real 'skinny' on motion leadership, or how to "move" individuals, institutions, and whole systems forward.

All Systems Go: The Change Imperative for Whole System Reform (2009)

- This book shows in specific and practical terms how to achieve successful reform across all schools in the system—the whole district or region, and the whole state, province or country.

This module zeros in on ‘change itself’, and identifies nine insights embedded in the metaphor ready-fire-aim. It shows how to start change with maximum effect.



Peters & Waterman

In 1982, Peters and Waterman offered the metaphor “ready-fire-aim” to capture the action bias of high performing companies that they studied. The concept was intuitively appealing but it was hard to find the savvy in there. It turns out that they were right, and we now have good evidence of the particular operational meaning of that famous phrase—and rich in insights it truly is.

There is a tight cluster of change-savvy ideas embedded in the “ready-fire-aim” wisdom.

**Ready-Fire-Aim
9 Insights**

1. Relationships first (too fast/too slow)
2. Honor the implementation dip
3. Beware of fat plans
4. Behaviors before beliefs
5. Communication during implementation is paramount
6. Learn about implementation during implementation
7. Excitement prior to implementation is fragile
8. Take risks and learn
9. It is okay to be assertive

—Peters & Waterman, 1982

**Relationships First
(too fast/too slow)**

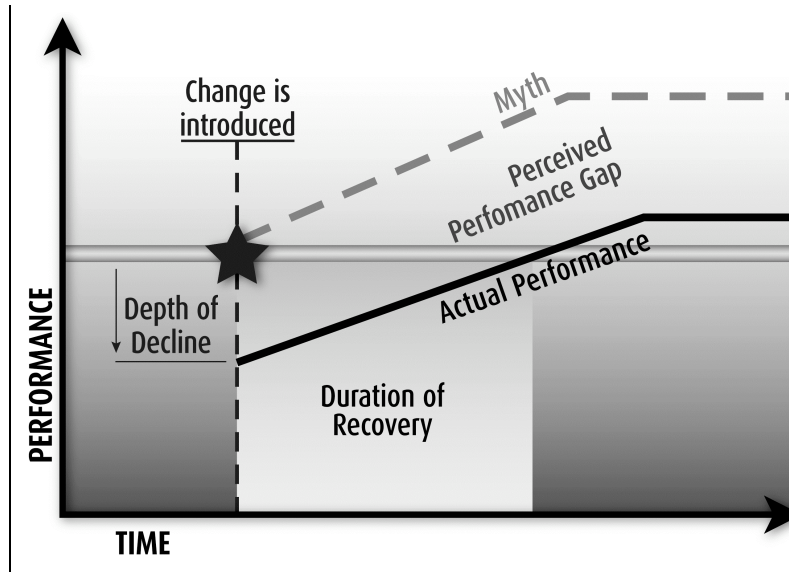
If the leader comes on too strong, the culture will rebel. If the leader is overly respectful of the existing culture, he or she will become absorbed into the status quo.

Change Savvy Leadership

- Careful entry into the new setting
- Listening to and learning from those who have been there longer
- Engaging in fact finding and joint problem solving
- Carefully (rather than rashly) diagnosing the situation
- Forthrightly addressing people’s concerns
- Being enthusiastic, genuine, and sincere about the change circumstances
- Obtaining buy-in for what needs fixing; and
- Developing a credible plan for making that fix

—Herold & Fedor, 2008

Honor the Implementation Dip



—Herold & Fedor, 2008

Myth of Change

Those who introduce the change (usually far removed from the implementation scene) assume that there will be some immediate gains. It can't be thus—by definition.

Depth of Decline

If you are an implementer, the costs to you are immediate and concrete, while the benefits are distant and theoretical. Thus the cost-benefit ratio is out of whack in favor of the negative.

Don't Expect Compliments

Remember your job is to help people get through the dip. Change-savvy leadership works to increase the upward slope of the bottom line of the triangle (decreasing the duration of recovery) so that the breakthrough line to the plus side occurs sooner—within six months in our best efforts.

Resolute Leadership

Change leaders are parsimonious in using a small number of powerful forces that get breakthrough results—such as having immense moral commitment to a cause along with a clump of empathy with those they are dealing with. This combination of resolute leadership and empathy enables leaders to find alternative ways when they get stuck. They demonstrate persistence with flexibility but never stray from the core purpose.

Beware of Fat Plans

The size and the prettiness of the plan is inversely related to the quality of action and the impact on student learning.

—Reeves, 2009

(Ready)-Fire-Aim

- Focus on the right priorities
- Attend to relationships, but get action sooner and treat it as a learning period
- Go light on judgment

Early Implementation

Early planning/implementation is more like 'strategizing' than it is like 'strategy'.

—Mintzberg, 2004

One-Page Plans

There is evidence that schools are well served by one-page plans that are clearly focused and sufficiently simple so that all participants in the process understand their role in executing the plans.

—Reeves, 2009

Behaviors Before Beliefs

Research on attitudinal change has long found that most of us change our behaviors somewhat before we get insights into new beliefs. The implication for approaching new change is clear. Do not load up on vision, evidence, and sense of urgency. Rather, give people new experiences in relatively non-threatening circumstances, and build on it, especially through interaction with trusted peers.

Communication During Implementation is Paramount

Communication during implementation is far more important than communication prior to implementation because communication in the abstract, in the absence of action, means almost nothing.

Ready-(Fire)-Aim

The change savvy leader accomplishes several critical things at this stage:

- Problems get identified through constant two-way communication
- Information is based on the specific happenings
- Leaders have multiple opportunities to communicate and refine the vision in relation to concrete implementation
- Problems get solved, a we-we identity around a common vision gets strengthened, and people come to know the implementation strategy

**Learn About
Implementation During
Implementation**

One of the most powerful strategies we have employed is to find different ways for implementers to learn from other implementers, especially those in similar circumstances who are further down the line.

Draw on the Wisdom of the Crowd

Effective leaders realize that many of the answers are out there. This is not a 'why can't you be more like your brother' strategy but rather a recognition that this is very hard work, some are figuring it out, and we can learn from them.

**Excitement Prior to
Implementation is
Fragile**

- Excitement in advance of doing something is understandable, but it does not have much of a foundation. Indeed, the fall in the implementation dip will be even greater if high aspirations precede it.
- Excitement during implementation when it occurs is solidly based on substance.

Change Knowledgeable Leaders

These leaders strive for small early success, acknowledge real problems, admit mistakes, protect their people, and celebrate success along the way. They avoid phony pep rallies. They love genuine results that generate great pride in the organization. They have their finger on the energy pulse of people, knowing that it will ebb and flow but will be spurred by positive results.

Take Risks and Learn

The skinny on risk taking is known by all organizations that are consistently successful, such as Toyota whose leaders embrace the philosophy "we view errors as opportunities for learning" (Liker and Hoseus, 2008).

Ready, Fire, (Aim)

Purposeful learning and taking learning risks is embedded in the psyche of successful organizations.

It's Okay to be Assertive

Many of the potentially best leaders in these democratic times are often reticent to assert themselves. To know about change is to know about inertia, which is to say that sometimes the status quo needs a wakeup call. You can't wait for success, you have to kick start it.

Three Conditions of Assertive Leadership

1. When leaders have built trusted relationships
2. When it turns out leaders have a good idea, and
3. When they empower people from day one to help assess and shape the idea

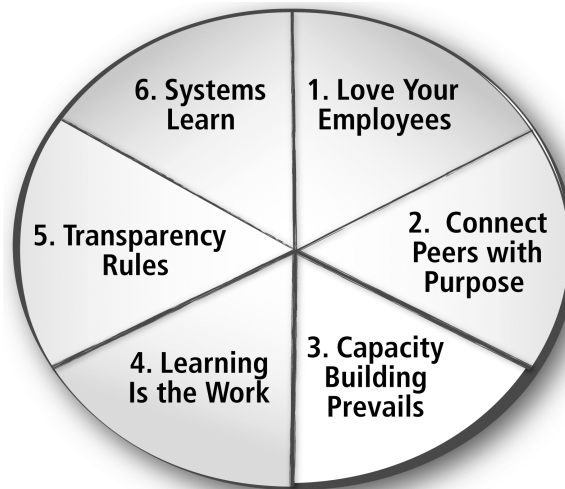
Change Savvy Leaders

- Know a great deal because they are learners
- Respect complexity and live by the definition of wisdom (using your knowledge while doubting what you know (Pfeffer & Sutton, 2008))
- Combine assertiveness and humility

The Skinny of Change

- To get anywhere you have to *do* something
- In doing something you need to focus on developing *skills*
- Acquisition of skills increases *clarity*
- Clarity results in *ownership*
- Doing this together with others generates *shared ownership*
- Persist no matter what—resilience is your best friend.

Six Secrets of Change



— Fullan, 2008a

Secret Two: Connect Peers with Purpose

Purposeful peer interaction within the school is crucial. Student learning and achievement increase substantially when teachers work in learning communities supported by school leaders who focus on improvement.

Secret Three: Capacity Building Prevails

The most effective strategies involve helping teachers and principals develop the instructional and management of change skills necessary for school improvement. The role of assessment for learning is essential in order to link data on learning to instructional practices that achieve student results.

Secret Four: Learning Is the Work

Professional development (PD) in workshops and courses is only an input to continuous learning and precision in teaching. Successful growth itself is accomplished when the culture of the school supports day-to-day learning of teachers engaged in improving what they do in the classroom and school.

Secret Five: Transparency Rules

Ongoing data and access to seeing effective practices is necessary for success. It takes up the dilemmas of 'de-privatizing practice' in which it becomes normal and desirable for teachers to observe and be observed in teaching facilitated by coaches and mentors.

Secret Two: Connect Peers with Purpose

Connecting Peers in a School

Purposeful peer interaction works effectively under three conditions:

1. When the larger values of the organization and those of individuals and groups mesh.
2. When information and knowledge about effective practices are widely and openly shared.
3. When monitoring mechanisms are in place to detect and address ineffective actions, while also reinforcing and consolidating effective practices.

—Fullan, 2008a

Knowledge Sharing

Literacy Learning Fair

Learning Fair Outcomes

- Forces schools to explain themselves
- Time for celebrating the work of the year
- Learn new ideas from other schools
- Friendly competition to outdo each other
- Fosters district identity

Results of Connecting

- Knowledge flows as people pursue and continuously learn what works best
- Identity with an entity larger than oneself expands the self into powerful consequences.

—Fullan, 2008a

We-We Commitment

What are your two best strategies for connecting peers?

Secret Three: Capacity Building Prevails

Capacity Building | Capacity building concerns competencies, resources, and motivation. Individuals and groups are high on capacity if they possess and continue to develop these three components in concert.

—Fullan, 2008a

Judgmentalism | Judgmentalism is not just perceiving something as ineffective, but doing so in a pejorative and negative way.

—Fullan, 2008a

Non-Judgmentalism | Focused on improvement in the face of ineffective performance rather than labeling or categorizing weaknesses.

—Fullan, 2008a

Judgmentalism | Is it possible to perceive something as ineffective and not be judgmental about it?

Letter off A, B

- Pick one of the four quadrants that represents a situation you have experienced.
- Make a few notations within the quadrant.
- Do a two-step interview with your partner A, B.

| FEELING | FEEDBACK | |
|----------------------|----------|--------|
| | Indirect | Direct |
| Belittled | | |
| Not Belittled | | |

Fear Prevents Acting on Knowledge

When people fear for their jobs or their reputation it is unlikely that they will take risks. Fear causes a focus on the short term and neglects the mid or longer term. Fear creates a focus on the individuals rather than the group, and teamwork suffers.

Capacity Building

People who thrive here have a certain humility. They know they can get better; they want to learn from the best. We look for people who light up when they are around other talented people.

—Taylor & LaBarre, 2002

Secret Four: Learning Is the Work

Culture of Learning

If we were to identify the single greatest difference between Toyota and other organizations (including service, healthcare, and manufacturing), it would be the depth of understanding among Toyota employees regarding their work.

—Liker & Meier, 2007

Toyota's Approach

The essence of Toyota's approach to improving performance consists of three components:

1. Identify critical knowledge
2. Transfer knowledge using job instruction
3. Verify learning and success

—Liker & Meier, 2007

Breakthrough



—Fullan, Hill, & Crévola, 2006

Dimensions of Relational Coordination

| Relationships | American | Southwest |
|----------------------|--|---|
| Shared goals | "Ninety percent of the ramp employees don't care what happens, even if the walls fall down, as long as they get their check." | "I've never seen so many people work so hard to do one thing. You see people checking their watches to get the on-time departure ... then it's over and you're back on time." |
| Shared knowledge | Participants revealed little awareness of the overall process. They typically explained their own set of tasks without reference to the overall process of flight departures. | Participants exhibited relatively clear mental models of the overall process—an understanding of the links between their own jobs and the jobs of other functions. Rather than just knowing what to do, they knew why, based on shared knowledge of how the overall process worked. |
| Mutual respect | "There are employees working here who think they're better than other employees. Gate and ticket agents think they're better than the ramp. The ramp think they're better than cabin cleaners—think it's a sissy, woman's job. Then the cabin cleaners look down on the building cleaners. The mechanics think the ramp are a bunch of luggage handlers. | "No one takes the job of another person for granted. The skycap is just as critical as the pilot. You can always count on the next guy standing there. No one department is any more important than another." |

Communications

| | | |
|-----------------------------------|---|---|
| Frequent and timely communication | "Here you don't communicate. And sometimes you end up not knowing things ... Everyone says we need effective communication. But it's a low priority in action ... The hardest thing at the gates when flights are delayed is to get information." | "There is constant communication between customer service and the ramp. When planes have to be switched and bags must be moved, customer service will advise the ramp directly or through operations." If there's an aircraft swap "operations keeps everyone informed. ... It happens smoothly." |
| Problem-solving communication | "If you ask anyone here, what's the last thing you think of when there's a problem, I bet your bottom dollar it's the customer. And these are guys who work hard every day. But they're thinking, how do I keep my ass out of the sling?" | "We figure out the cause of the delay. We do not necessarily chastise, though sometimes that comes into play. It is a matter of working together. Figuring out what we can learn. Not finger pointing." |

— Gittel, 2003

Secret Five: Transparency Rules**Getting Started with Transparency**

- Data walls — elementary teachers
- Data walls — high school teachers

Medicine

To fix medicine we need to do two things: measure ourselves, and be open about what we are doing.

—Gawande, 2007

Classroom Improvement

Transparency + non-judgmentalism + good help = classroom improvement

—Fullan, 2008a

Statistical Neighbors

As part of the overall strategy, Ontario created a new database, which is called “Statistical Neighbors.” All four thousand schools are in the system. They are organized into four bands—students and schools from the most disadvantaged communities, two bands in the middle, and a fourth comprising students in the least disadvantaged communities. Schools can be examined using other categories as well—size of school, percentage of ESL students, geographical setting (rural or urban), and so on.

We are now in a position to use the data, and here is where the nuance of Secret Five comes into play. Simply publishing the results can possibly do some good, but more likely than not would have negative side effects. Instead we operate under a set of ground rules:

1. We do not condone league tables—displaying the results of every school from lowest to highest scores without regard to context. Instead we do the following:
 - a. Help schools compare themselves with themselves—that is, look at what progress they are making compared to previous years;
 - b. Help schools compare themselves with their statistical neighbors, comparing apples with apples;
 - c. Help schools examine their results relative to an external or absolute standard, such as how other schools in the province are faring and how close they are to achieving 100 percent success in literacy and numeracy.
2. We work with the seventy-two school districts and their four thousand schools to set annual “aspirational targets” based on their current starting point.
3. We focus on capacity building, helping districts identify and use effective instructional practices.
4. Although we take each year’s results seriously, we are cautious about drawing conclusions about any particular school based on just one year’s results. We prefer to examine three-year trends to determine if schools or districts are “stuck” or “moving” (improving or declining).
5. For schools and districts that are continuing to under-perform, we intervene with a program called Ontario Focused Intervention Partnership (OFIP), which provides targeted help designed to improve performance. There are currently about 850 of the 4,000 schools in this program. We are careful not to stigmatize schools in OFIP (in keeping with Secret Three), because doing so gets people sidetracked into issues of blame.

Overall, we think that this approach to data-informed development is effective. There is quite a lot of pressure built into the process, but that pressure is based on constructive transparency. When data are precise, presented in a non-judgmental way, considered by peers, and used for improvement as well as for external accountability, they serve to balance pressure and support. This approach seems to work. After five years of flatlined results before beginning the program (1999 – 2003), the province’s literacy and numeracy scores have climbed by some ten percentage points, with OFIP schools improving more than the average.

In England, schools and LAs can also track their performance through a data system called RAISE in which they can trace their performance over time.

—Fullan, 2008a

Module Three, 'love, trust, and resistance' examines how this cluster of factors is intertwined. The module reveals why resistance can be necessary and helpful, and how change can be increased as long as it is built on a climate of trust.

How do you get trust if you don't have it?

Love, trust, and resistance are closely interrelated. The skinny is to unravel them and then recombine them with powerful consequences—simplicity.

Theory X Assumptions

- The average human being has an inherent dislike of work and will avoid it if he or she can.
- Because of their dislike for work, most people must be controlled and threatened before they will work hard enough.
- The average human prefers to be directed, dislikes responsibility, is unambiguous, and desires security above everything else.

—McGregor, 1960

Theory Y Assumptions

- If a job is satisfying, then the result will be commitment to the organization.
- The average person learns under proper conditions not only to accept but to seek responsibility.
- Imagination, creativity, and ingenuity can be used to solve work problems by a large number of employees.

—McGregor, 1960

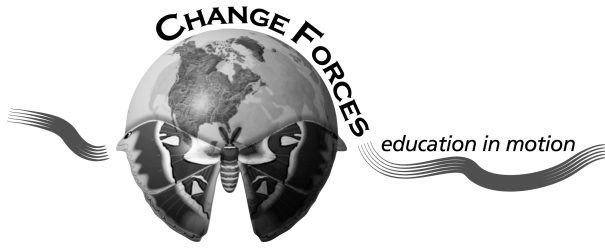
Dimensions of Trust

- Model integrity (sincerity, reliability, honesty)
- Model competence (skill, effectiveness)

To get over the implementation dip of establishing trust is to be rewarded with what Stephen Covey calls "the speed of trust." If there is anything worth investing in upfront it is to demonstrate your trustworthiness especially in the face of suspicion or mistrust. Low trust, as Covey says, means low speed (motion slows to a half) and high cost (financially and emotionally). High trust does the opposite. You can get so much more done, more quickly.

| | |
|-------------------------------|--|
| Resistance | <p>Purposeful per interaction (which incorporates resisters or makes them increasingly uncomfortable), non-judgmental capacity building, learning is the work, and transparency of data and practice are stances and strategies that combine to synergize support and pressure as an almost irresistible force.</p> |
| Four Ways to Recombine | <ul style="list-style-type: none"> • Start with love (Theory Y) • Behave your way into trust • Earn trust through demonstrated integrity and competence • You can't make people change but if you are change savvy things will conspire and reduce if not eliminate resistance |
| Turning Around People | <ul style="list-style-type: none"> ▪ Think of a situation where you saw a disengaged person change to become excited/involved. ▪ What caused the transformation? ▪ Interview each other. |
| Motivational Work | <ul style="list-style-type: none"> ▪ Meaningful, accomplishable work ▪ Enables development ▪ Sense of camaraderie ▪ Being well led |
| Perspective | <ul style="list-style-type: none"> ▪ Government level: Be assertive about the direction, and engage in two-way partnership with the sector ▪ Field: Exploit government policy, seek engagement vertically and horizontally; be proactive ▪ General advice for all: Do the work! |

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Michael Fullan led the evaluation team which conducted the four-year assessment of the National Literacy and Numeracy Strategy in England from 1998-2003. In April 2004 he was appointed Special Advisor to the Premier and Minister of Education in Ontario.

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