

*We are pleased to present the second Case History to which we have asked OD consultants to respond. Homer Johnson is managing this on-going feature.*

## CASE HISTORY

# The Case of Camwell High School

*By Homer H. Johnson*

**T**HE CONSULTANTS WERE first contacted in early July by Marian Alonzo, the principal of Camwell High School. She told them that she had recently completed her first year as the head of Camwell and needed help to “change the culture at Camwell High.”

Alonzo explained that she had spent her first year at Camwell ensuring that the school was running smoothly and getting to know the faculty, staff and students. Now that the school year was over, she was ready to start thinking about what changes Camwell needed, or as she put it, “to start thinking about my legacy.”

Under the previous principal’s administration, decision-making was centralized at the principal or associate principal level. Although chairpersons were in place for all curriculum areas such as Science, Math, and English, these persons had little authority or responsibility. Several older teachers supported the previous principal’s management style and thought his “tight ship” approach was necessary in order to run a large high school. However, the newer teachers were less supportive. They believed this style blocked new developments in teaching. For example, Camwell was the last high school in the area to intro-

duce computers as instructional tools. The previous principal thought they were too expensive and unreliable, and he was not convinced of their educational value.

Alonzo’s vision for Camwell, as she told the consultants, was to develop a collaborative learning community, one where teachers would have high standards for themselves and for their students. They would have the freedom to design and teach a curriculum that would meet these high standards and—importantly—they would be held accountable for their performance. She thought that this could happen only if decision-making was decentralized down to the department level, putting the faculty in charge of setting standards and designing a curriculum that would deliver those standards. However, she did not want to impose her structure on the faculty and thought the new structure and culture could be “self-organizing,” emerging out of collaborative discussion.

The consultants had worked with another school in the district and had some familiarity with Camwell. After two meetings with Alonzo, the consultants agreed to work with her in this change effort. Their primary role would be as advisor and coach to Alonzo on change management. In addition, they

would design and facilitate the retreat scheduled for the beginning of the school year, and would serve as process consultants at subsequent meetings. Because they thought it was important for Camwell faculty to take ownership of the change, the consultants suggested they provide a supportive role, rather than assume leadership in this process.

As a first step, the consultants advised Alonzo to have lunch with most, if not all, of the department chairpeople individually over the summer to share her vision with them and to elicit their ideas and support. Because they would be the key people to implement the change, obtaining their reactions and suggestions prior to suggesting any change would be important. She did so, and reported that the meetings went quite well.

In mid-August the school traditionally held a two- or three-day retreat with the entire faculty and administration. Under the previous principal, a typical agenda for this retreat was, as one teacher described it, “getting our marching orders”: outlining the schedule for the coming year, making teacher assignments, and reviewing school rules and regulations. Alonzo and the consultants decided that the retreat, which would be facilitated by the consultants, would be a good time to introduce and model the new culture.

The first day of the retreat was designed to get to know each other, to welcome the new teachers, and to discuss school start-up issues. On the second day, the faculty met in their departments, and the facilitators led them in a team-building exercise. They provided rules for effective meeting management and asked the department groups to develop their own ground rules. After this, the departments discussed start-up and curriculum issues. On the third day, Alonzo shared her vision for Camwell. The department groups provided feedback on the vision, added to it, and later offered suggestions on how to proceed. Feedback from participants indicated that the retreat had been very successful.

One decision made during the retreat was to form a 14-member committee, which would serve as the major vehicle for change. This committee would consist of the department chairpersons plus several faculty members who represented a cross-section of the school. Alonzo would chair the committee. The committee planned to meet every three weeks depending on the school schedule. The consultants would assist in the design of the meetings and function as process consultants during them. Alonzo (as chairperson) would run the meetings.

There was considerable excitement and enthusiasm during

the first several meetings. The committee spent a lot of time in the first meeting defining its members’ roles and responsibilities and discussing the expected outputs. In the meetings that followed, the “vision” was discussed and clarified, including specifically what would be expected of each stakeholder group—administration, chairpeople and teachers. A draft of this document was presented for comment at a teacher inservice meeting in late November. Although it did not generate a lot of discussion, the faculty was very supportive.

After the first of the year, much of the work was to take place at the department level (in which the consultants did not participate). The agenda for the department meeting was not specified, although the committee suggested they work on issues of curriculum and standards. The committee met monthly and functioned as an advisory board to Alonzo, giving her input on several pressing issues.

The only major task the committee undertook in the spring was to redesign the annual performance review process for teachers. In the past, the principal and associate principal had done all reviews with no input from the teacher or the teacher’s chairperson. The criteria for evaluating the teachers and the outcome of the review were often times a mystery, unless, of course, you were fired. Of all the issues raised at the August retreat, this seemed to be the one issue that the faculty unanimously wanted to see

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changed.

After much discussion and several visits to a high school in an adjacent district, the committee decided to adopt the process used at that high school. In the new process, each teacher submitted a portfolio of his/her lesson plans and other materials, as well as examples of student work. This was given to the department chairperson, who was responsible for meeting with the teacher. The two of them would then design a development

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plan for that teacher. This process is fairly standard in many schools, and puts the emphasis on teacher development rather than evaluation. Most of the Camwell faculty agreed to the new approach.

With only a month remaining in the school year, the consultants received a call from Alonzo who requested an emergency meeting with them at 8 a.m. the next morning. At the meeting she told them that she was very discouraged and frustrated about the progress that had been made to date and was considering dissolving the committee. She was disappointed that they had been working on this change effort since last summer and didn't have much to show for it. In her opinion, the committee had spent a lot of time discussing change; but when it came to actually making changes, not much had happened. For example, while the departments had spent a lot of time discussing curriculum changes, only two had anything to show for it: Math had revised the curriculum to include two new honors

#### **ARNOLD MINORS, Ontario, Canada**

These consultants negotiated a primary role as advisor and coach about change management to Ms Alonzo. More precisely, the change involved here is implementation of culture change. It is not apparent that they advised Ms Alonzo that culture change is a relatively long-term process, particularly where the expected outcome is a collaborative learning community. It was predictable that the way in which this community would unfold would be uncertain.

Principals in Ontario – and I suspect, elsewhere – would be pleased at the progress that was made in such a short time, especially given the predictable resistance that would come from “several of the older teachers.”

In light of the experience so far at Camwell, I would

- ask Ms Alonzo what specific actions she was expecting, given her choice to allow a “self-organizing structure and culture”;
- discuss, in some depth, the nature of organization change – speed, issues of resistance, identification of things which would have to remain unchanged, etc;
- acknowledge the changes which have occurred and encourage Ms Alonzo to continue with her dream;
- suggest that at least one of the two consultants be replaced with one who has expertise in change management and that this person's function would be to work directly as Ms Alonzo's coach;
- propose that the new coach negotiate a more specific contract for advising and coaching (frequency of meetings, nature of information that Ms Alonzo might need, etc); and
- negotiate the process consultation contract so that the terms are clearer about potential outcomes.

I know that principals in Ontario, where I live, would be delighted to get that kind of help. So would Ms Alonzo and Camwell High.

#### **BETH APPLGATE, Silver Spring, MD**

I believe poor management of the transition process was the root cause of the client's frustration, which took the consultants by surprise in the Camwell High School case. Together, we can change many things in organizations. However, if the individuals who make up the client system don't actually make a shift – go through the process of letting go – they will keep showing up the same way.

If I had been consulting with Alonzo, I would have better determined who the client was and more thoroughly clarified the client systems need and readiness for change. I would have helped Alonzo set realistic expectations about the scope of the change process and her goals. Finally, I would recommend that we begin our work together by utilizing action research.

To prepare Alonzo for her one-on-one meetings, I would have suggested that they begin a data gathering process with the staff to determine the external and internal forces that maintain the status quo. Next, I would have helped her develop a set of talking points and questions to: introduce the idea of a change process; and gather data from the faculty about their vision for a desired future state.

At the faculty retreat, I would have assisted the whole system with analyzing the factors identified in the data collection through a force field analysis. And, in addition to helping them understand the tenets of organizational change readiness and resistance, I would have helped faculty understand change at a personal level.

With the 14-member change process advisory committee, I would have assisted them to identify the committee's mission and clarifying roles, goals, process and relationships within the committee, and among the rest of the faculty. Additionally I would have helped them to determine what norms or rules made sense and which worked against their desired state. Finally, it would be critical that the committee and department heads agree to clear, prioritized and measurable outcomes and that ongoing communication and coordination between the change committee and departmental heads was ensured so that they could manage unexpected side effects resulting from the change effort, and make adjustments accordingly.

At the faculty in-service meeting, I would have encouraged Alonzo to share the implementation plan and timeline with the faculty and enlist their measurable involvement. I would have recommended that results be evaluated and communicated to all faculty on an ongoing basis and that incremental successes were celebrated.

If I had received the emergency call, I would have needed to resist the temptation to over-function by offering expert advice on how to solve the problems she raised. I would continue to hold an objective mirror before her as she experimented with answers. Finally, I would have asked her what she believed were the appropriate next steps and how I could assist her in taking them. I would not have thrown in the towel, I would have continued to trust the process.

**DAVID MOXLEY, Detroit, MI**

Let me use this opportunity to inventory all of the tactical errors I made as the Camwell consultant. I didn't get Principal Alonzo to pause when she took ownership of the "vision" as her legacy and instead I merely accepted it without clarifying the need to engage faculty from the very beginning. Faculty needed time to frame the change process for themselves and their school. They needed time to honestly reveal their preferences about the direction and tempo of the project. Adequate time was needed to reduce the gulf of differences in preferences for change between younger and older faculty members who held substantially different styles, expectations, and aspirations about school management. There is a real need at Camwell for faculty members to understand and respect differences among themselves while they discover unity, a process that requires adequate time.

Principal Alonzo needed to trim back her expectations. Perhaps I could have framed the coming academic year as a preparatory one in which faculty members would contemplate the change process, simply work on getting ready during the first year, and produce a plan of action. To satisfy her desire for action and concrete results, we could have identified several pilots or experiments—identifying areas of the curriculum for improvement, implementing new faculty evaluation protocol in one department that could champion this change, and restructuring some courses. It does sound like the accomplishments of the first year helped faculty members to ready themselves for future challenges. Some important outcomes were achieved regarding curriculum change, the design of new courses, and the preparation of proposals for external funding. These achievements deserved celebration since the recognition of small victories can sustain the morale and elevate the energy of participants.

Principal Alonzo needs energetic allies. So I would encourage her to recruit individual faculty members from both the new and senior generations who could take on some of the pilots. They could exemplify change at the individual faculty level, collaborative learning with colleagues and students, and how to use portfolios as springboards for professional development. Involvement of both young and old faculty members as role models may come to symbolize Camwell's commitment to trans-generational change.

When I meet with Principal Alonzo, I would simply apologize for misdirecting her. I would suggest that we needed to respect the first year for what it was: a time to get ready and a time to get people on board. "Principal Alonzo," I would say, "it's time to walk the razor's edge." "What?" she may say with some irritation to her voice. As the Buddhists suggest, we need to walk between the long and short term, between action and reflection, between outcome and process, and between hard work and celebration. Principal Alonzo's legacy could emerge out of a balance of polar opposites—a school whose resilience and vitality are its principal's resources.

courses, and Science was writing a grant proposal for a computer-based biology lab course.

The final straw was the annual performance review. While she was pleased that the school had adopted a new and developmental process, the chairpeople had refused to implement the process in their departments. Their excuse was that this was the end of the school year—they were already overloaded with tests, grading, graduation, band concerts, and other work, and couldn't take on any additional responsibilities. Further, some of the older teachers objected to the new process, and the chairpeople wanted to avoid a confrontation with them.

Alonzo added that she believed that Camwell's culture had changed, but not very much. She conceded that the faculty probably felt more involved and more committed to the school, but she felt that their involvement was primarily in giving advice. Her belief was that, in order to change a culture, people have to take action—not just give advice. With that said, she had to run to a district meeting and excused herself, adding that she would like to discuss this further with them later in the week. The consultants sat in stunned silence as she left, wondering what next step to take. They hadn't seen this coming.

Let's assume that you are the consultant in this case. What do you think is going on with Alonzo, and the faculty? Looking back over the last eleven months, what, if anything, could or should you have done differently to avoid the current problem? When you meet with Alonzo later in the week, how would you structure that meeting? What advice and help would you give her for moving forward? Or would you suggest she throw in the towel on this effort?

**HOMER JOHNSON RESPONSE**

Our panel of expert consultants did a great job of identifying the major issues in this case and suggesting alternative strategies. Let me highlight a few points that I see coming out of their analysis. The panel apparently did not have too much of a problem with the overall agenda set by the consultants. That is, the summer meeting between the principal and the department chairpersons, the new look for the beginning of the school year retreat, the 14 person transition committee, etc., seemed to provide a reasonable structure and process for changing Camwell's culture. However, the panel did have some issues with what went on in those meetings.

1. "Self-design" doesn't mean "laissez faire." There seems to be an underlying theme among the panel that the consultants may have been too laissez faire in assisting Alonzo and the faculty, particularly in the area of setting realistic expectations (see below). We don't know why this occurred, whether by design or lack of knowledge. One might speculate that Alonzo's insistence on a self-designing process may have caused the consultants to back away from giving too much input. Whatever the reason, there was a clear need here for more active consulting. Helping the clients articulate a mission, and a focus,

and reasonable goals, and helping them understand the change process would have been helpful. Having the client group look at themselves and how they are working together, and urging them to celebrate accomplishments, is a critical part of any consulting process, which for some reason the consultants failed to do (or didn't do enough of) in this case.

**2. Whose vision, Alonzo's or the faculty's?** A couple of the panel members were uncomfortable with starting the process around Alonzo's vision for Camwell High. Her meeting with the department chairpersons over the summer to share her vision and to elicit their support, as well as using her vision to kick off the change process in the August faculty retreat, focused the change effort around Alonzo's vision of Camwell. Both Beth Applegate and David Moxley suggested starting the process by having the faculty develop a vision for Camwell. Although they suggest slightly different processes, either would have developed more ownership by the faculty and would have helped the faculty "let go" (see below) of the past.

"Whose vision" is an interesting issue that OD practitioners frequently face. One could also argue, from the perspective of those in Whole Systems Change, that all stakeholders, for example, parents, students, faculty, and community members, should have been a part of developing a vision for Camwell, not just the faculty. And certainly for those who work in the private sector, having top management develop the vision is standard practice, and it is often the OD consultant's job to implement the vision throughout the company.

**3. Make sure the expectations are very clear.** As the panel pointed out, Alonzo had very different expectations as to what she expected could or would be accomplished during the school year than did the faculty. Actually, there were probably several sets of diverse expectations among the faculty itself, as well as with the consultants and with Alonzo. A major agenda item both for Alonzo and the faculty should have been the development of a consensus on what they would like to accomplish, and what they could reasonably accomplish, in the long term, and particularly in the current school year.

**4. Set reasonable (and "doable") expectations.** Following up on the previous point, the panel noted that Alonzo's expectations were unreasonable given what we know about culture change. In fact, this probably was the major cause of her suggestion to call off the change process. She apparently thought that they could change the culture in nine months, and one suspects she thought she could ram it through. It was the consultants' responsibility to help her be more realistic both in terms of what was possible, as well as suggest a more effective way of accomplishing the change. This should have dealt, at the very start with the relationship between the consultants' and Alonzo. Culture change usually takes several years. The message here is don't expect too much in the first year.

I like Beth Applegate's idea of using William Bridges' transition management as a framework for this change effort, as well as her suggested agenda for the first year. This first year

might have been more focused on "letting go of the past," rather than pushing ahead into the (somewhat unspecified) future. David Moxley made the same point from a different perspective by suggesting the first year should be focused on "unfreezing," a la Kurt Lewin. "Letting go" or "unfreezing" would have been a major accomplishment, may have brought the different factions together, and would free the faculty to move on to the future.

**5. Use pilot projects which have a high probability of success.** An old piece of wisdom for starting a TQM process in a company was that you start with a manager and a department who is both competent and excited about the process, and do a pilot project in that department. Early success will build confidence and you can move from there. David Moxley suggested just that strategy for the transition committee. In the first year, focus on a couple of "doable" projects. Get some early "victories," and Camwell will be ready for a more extended effort in the second year. Good advice for any change project.

**6. Celebrate accomplishments.** Arnold Minors pointed out that principals in Ontario would have been pleased at the progress that Camwell made in such a short time. Much was accomplished, although Alonzo apparently didn't appreciate the amount of progress. All of the panel members noted the need for celebrations, even for small accomplishments. These reward people for their efforts and also send a signal as to what is important.

**7. Renegotiating the contract with Alonzo and the faculty.** So, what happens now? What should the consultants tell Alonzo at the next meeting. The panel agreed on a couple of points. One was that there had been some important accomplishments in the school year. A second was that the change effort should continue. The question is how the consultants should handle the meeting. Beth argues for a more reflective approach and "continue to hold an objective mirror before the principal as she experimented with the answers." David proposes a somewhat different approach, asking Alonzo to look at the first year in a different framework. Arnold suggests, among other input, discussing the nature of organizational change. I realized that I have oversimplified their positions, but my point is that there are a couple of ways of handling this meeting. Whatever way it is handled the panel suggests, some more directly than others, that it is time for a renegotiation of the contract, with a better understanding of expectations, of the role of the consultants, as well as a redesigning the change process.

Finally, I think it important to note that even considering the above comments, the consultants had some good points in their design and facilitation. They did get the change process off of the ground, and as Arnold pointed out, many principals would have been pleased at how much was accomplished during the year. Our purpose here is not to nit pick the efforts of other consultants, but rather to look at problems that arise in consulting and examine what we might do better. It is with the hope of improving OD practice that these suggestions are offered. ■