Vision and Action: Two Sides of the Coin for Systemic Change in Education
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Systemic change is far more difficult than piecemeal reforms because it requires far more interrelated and interdependent sets of changes to occur. Systemic change has two potential areas of failure: 1) the change process may never reach full implementation of the new system, and 2) the new system (vision) may not be well designed. Therefore, a body of knowledge about systemic change in education must address both sides of the coin: 1) the vision and 2) the process (action) by which the vision is created and implemented.

The Vision

Based on an extensive review of the literature about the educational needs and tools of a digital, post-industrial society, we have identified 25 principles organized under six core ideas that inform the creation of a vision to better meet students’ and communities’ needs. These principles are highly systemically interdependent but incompatible with most features of teacher-centered schools, thus requiring paradigm change. Systems thinking is crucial designing a school system based on these principles.

1. Competency-based education
   A. Competency-based student progress
   B. Competency-based student assessment
   C. Competency-based learning targets
   D. Competency-based student records
2. Learner-centered instruction
   E. Learning by doing (project-, problem-, inquiry-, task-, and maker-based learning)
   F. Instructional support just-in-time during projects
   G. Personalized learning (personalized goals, projects, instructional support, assessment, and reflection)
   H. Collaborative learning (in both team-based and individual projects)
3. Restructured curriculum
   I. Focused on relevance to students’ current and future lives
   J. Whole-child education
   K. Balance of “universal” content and cultivation of individual strengths/talents
   L. Sound progressions in content
4. New roles
   M. Teacher as guide on the side
   N. Student as self-directed learner
   O. Parent as partner
   P. Technology as tool for students to serve four functions: planning, instruction, assessment, and recordkeeping for student learning.
5. A nurturing culture
   Q. Cultivation of strong and caring relationships
R. Multi-year mentoring and multi-age grouping
S. Motivational learning experiences
T. Family services

6. New organizational structures
U. Small school size
V. Professional organizational structure – teachers “own” their public schools
W. Student choice, incentives, and accountability that is user-based rather than bureaucracy-based.
X. Administrative structures support rather than control the teachers
Y. Governance structures empower the teacher-led schools

The Action

Based on an extensive review of systemic change processes for organizational transformation, we have identified a set of values (what people feel is important), principles (what works empirically), and activities (what can be done that has proven effective) to create and implement a viable vision that will better meet today’s and tomorrow’s educational needs.

The values include:
• Putting students first in all decisions
• Improving the quality of life for the adults who work in schools
• Creating healthy relationships between a school system and its community
• Building a shared vision among all stakeholder groups and empowering them
• Exemplifying group-action values, such as collaboration, consensus-building, systems thinking, dialogue, team learning, and more
• Exemplifying personal-action values, such as full disclosure of concerns, trust, respect, responsibility, commitment, self-criticality, and flexibility
• Understanding societal evolution and the need for co-evolution of educational systems
• Building readiness and capacity for change.

The principles include:
• Change in mental models is essential
• Broad stakeholder involvement and ownership
• The process is more important than the product
• Consensus-building process
• Participatory leadership
• Political support
• Readiness and capacity
• Culture
• Ideal design and invention
• Emergence and leverage
• Prioritization of learning experiences.
The activities include some that must be performed continuously throughout the systemic change process and others that must be performed in a certain sequence, at a certain time in the process.

The continuous activities include:
- Evaluate and reflect on the process
- Build and maintain trust
- Evolve mental models and culture
- Sustain motivation
- Develop systems thinking and design skills
- Develop and sustain appropriate leadership
- Communicate interactively with stakeholders
- Secure and allocate necessary resources
- Develop group-process and team-building skills
- Engage in self-disclosure
- Build and evolve a sense of community
- Foster organizational learning and memory

The sequential activities depend on scope of your change effort: a single school or a whole school district. Transformation of a single school within a district is not sustainable because it will be incompatible with the rest of the district. Therefore, the single school process should only be used in a school that operates independently, such as many charter schools and private schools.

The following is a brief summary of the four phases of the sequential activities for a single school.

1. Prepare for the change process. First initiate the change process, which entails selecting a process facilitator, ensuring sufficient school readiness, and ensuring leadership support and understanding. Then form a prelaunch team, develop its culture and capacity, and develop school capacity, including securing funding and selecting an assistant principal for transformation.

2. Create a shared ideal vision, expand capacity, and develop a strategy for change. First, the prelaunch team expands into a school leadership team that includes leaders of all stakeholder groups in the school to lead this activity. Each leader engages others in their stakeholder group (akin to pyramid groups), to share and evolve thinking and seek input to the vision. During this time, the leadership team develops the school’s capacity for change. Next, the leadership team develops a strategy for the implementation approach (whole-building or school-within-a-building) and decides which grade levels to transform in the first year of implementation. Then the leadership team decides on ways that the ideal needs to be scaled back for the initial implementation of PCBE in the school, taking into account the need to make sufficient high-leverage changes right away. Finally, they decide how many and which teachers will transform in this first iteration, and those teachers are formed into task forces that prepare detailed designs for the initial studios (classrooms) on each of the selected grade levels.

3. Implement the vision. Time and money are allocated to procure necessary resources, finding or designing projects and other activities for students, engaging teachers in
professional development, and remodeling facilities. This is also the time to recruit students and hold a student orientation to prepare them for their new roles. A parent orientation is also held. Then the school implements high-leverage changes for its vision and makes other changes as the need emerges. Leaders continuously evaluate and improve the new system. Finally, recruit additional teachers each year and form task forces to expand the implementation to other classrooms on the same grade levels, as well as to the next-higher grade level.

4. Evolve the implementation: The school makes additional changes as needed or desired in order to support the high-leverage changes. Formative evaluation is key. Eventually, the school forms a new leadership team to develop and evolve toward a new ideal vision. The following is a brief summary of eight phases for the sequential activities in a district-level systemic change process.

1. Prepare for the change process. Preparing a school district for paradigm change is critical to successful implementation of PCBE. It is important to partner with an experienced external process facilitator, marshal political support, form a small prelaunch team (seven or eight people) that includes leaders from the major stakeholder groups, and enhance district capacity for paradigm change.

2. Create a shared ideal district vision and develop capacity and a strategy for change. Developing a shared vision of PCBE promotes learning, mindset change, and commitment to change, and it reduces resistance to change. The prelaunch team expands into a district leadership team (roughly 30 people), which includes leaders of all stakeholder groups in the district. Each member of the leadership team engages others in their stakeholder group to get input from them and help those stakeholders’ thinking evolve with the leadership team members’. In this way, stakeholders’ mindsets shift towards the PCBE paradigm as the district leadership team’s vision begins to crystallize. During this time, the district leadership team also develops the district’s capacity for change. This primarily entails cultivating a culture for change, developing the change process skills of participants, and procuring resources for the process. The district will soon need funding to visit other PCBE districts and schools, provide professional development for teachers, remodel facilities, and procure tools and materials for PCBE. Finally, the district leadership team develops a strategy for implementing the vision, typically involving decisions about the number of schools (one “feeder system” versus all the schools) and the number of teachers in each school (one “school within the school” versus the entire school).

3. Choose a school or schools to pioneer PCBE: The district leadership team solicits applications for schools to pioneer PCBE and selects the one (or more if enough resources are available) that demonstrates the highest level of readiness—not the one with the greatest need. The district leadership team also helps other schools to improve their readiness for change.

4. Create a shared ideal school vision.
5. Create a separate district administrative structure.
6. Implement and evolve the school vision.
7. Expand to additional schools.
8. Evolve the ideal visions.

[There will be many references, but they are omitted here due to the word limit.]