Gollob Rolf,
Doctor of Science,
Professor emeritus at the Zurich University of Teacher Education,
Zurich, Switzerland
rolf.gollob@phzh.ch

Hrynova Mariia,
Doctor of Philosophy,
Senior Lecturer at the Department of Philosophy of Education
Odessa Regional Academy of In-Service Education,
Odessa, Ukraine
https://orcid.org/0000-0003-1308-2634
marishagrin@ukr.net

SUSTAINABLE CHANGE MANAGEMENT IN EDUCATIONAL ORGANIZATIONS: ANALYZING, PLANNING, IMPLEMENTING, REFLECTING

Summary. *The article reveals the problem of change management in educational institutions in the context of constant social and political transformations. The attention is focused on modern education's continuous challenges require educational institutions' leaders to adapt to new circumstances and constantly improve their organizations. In practice, changes are often initiated only in crisis situations, causing a reactive approach and a sense of powerlessness in the face of the inevitability of change. It is emphasized that the success of educational institutions in the process of change largely depends on the ability of their leaders to proactively approach change by developing strategies that consider the needs and expectations of all stakeholders. Based on the analysis of scientific sources and existing management practice, the key role of positive leadership, participatory management, and human potential development in the process of managing changes in an educational institution on the basis of strategic management of the development of an educational institution and distributed responsibility for the effectiveness of the functioning of an educational institution in the face of constant change is established. The main factors that affect the quality of sustainable change management in educational institutions are identified and characterized, especially in times of crisis, such as a pandemic or war, when the need for rapid change can lead to chaotic actions without proper assessment of their long-term consequences. These include: diagnosing the initial positions of stakeholders before starting any changes in order to identify existing obstacles and plan more flexible strategies; creating a culture of learning and engagement in the implementation of changes, which helps to make them more effective and sustainable; conducting interventions – actions aimed at supporting changes at the level of individuals, groups and the educational institution as a whole; ensuring reflective practice, which involves constant analysis of processes, strategies, and interventions at each stage of the process. It is concluded that changes in educational institutions should not be perceived as a linear process with fixed stages but as a dynamic, continuous process of learning, adaptation, and development.*

Keywords: *educational institution, crisis management, educational innovations, participatory management, positive leadership, proactive approach to change management, human resource, shared responsibility, strategic management, change management.*

Formulation of the problem. Against the backdrop of constantly changing environmental conditions, education's success fundamentally depends on an educational institution's ability to adapt to developments and continue to evolve. This initial situation points to the area of tension in which educational leaders and their institutions find themselves today. On the one hand, organizations are fundamentally designed for stability and continuity; on the other hand, they are simultaneously exposed to permanent pressure to change, which throws them off balance and demands a high degree of flexibility, change, and learning skills from them and, thus, from their leaders.

Analyzing recent research and publications. The rapidly changing present has actualized the international scientific discourse on change management in general and in education in particular. Among the publications on the relevant topics for use by educational managers to develop their professional capacity to manage sustainable change are the scientific studies of such researchers as D. Collins (1998), M. Fullan, (2001), D. Garvin (2003), A. Hargreaves, A. Lieberman, M. Fullan, & D. Hopkins (2010), M. Hughes, M. (2010), S. Kauffeld, N. Lehmann-Willenbrock (2008), T. Lauer (2014), J. Srebrenica (2004), J. Stivers (2009), D. Vahs (2020), etc. Various aspects

of change management in education are actively studied by Ukrainian scholars. Particularly noteworthy is scientific research on the theoretical foundations of public administration of educational changes in Ukraine (Semenets-Orlova, 2018), factors and risks of changes in the management of an educational institution (M. Ruchkina), psychological features of managerial activity of managers of educational organizations in the context of innovative changes (Klochko, 2022), principles and specifics of the algorithm for managing changes in the educational process of general secondary education (Zhorova, 2023), management of general secondary education institutions in times of war (Lukashenko, 2023), etc. In addition, the use of practice-oriented materials developed on the basis of modern scientific achievements in the field of educational change management is available to Ukrainian educational managers through long-term international cooperation in the implementation of a number of educational projects. Among them are the Austrian-Ukrainian project «New Requirements for the Competencies of School Leaders in Ukraine», the Swiss-Ukrainian project «DECIDE – Decentralization for the Development of Democratic Education», the Czech-Ukrainian project «Support for the Renewal of Ukrainian Education», etc.

Emphasizing previously unresolved parts of the overall problem. In society as a whole, change is no longer seen as an exception but as a constant. Political and socially relevant groups regret this, but phases of calm, moments of holding on, and times without transformation are no longer valid characteristics. In today's educational landscape, one change follows the next, usually even simultaneously, increasingly often overlapping, and sometimes even contradictory. A distinction can be made between first-order change (gradual change) and second-order change (radical change). Gradual change processes usually lead to modifying or adapting working methods, making managing change processes more manageable. Radical change processes, on the other hand, involve far-reaching changes that lead to greater uncertainty and complexity within the company.

Being able to deal with these constant change processes is increasingly becoming a key quality characteristic of leaders in the education sector. However, it can be observed that in practice, change processes are only initiated when a crisis already exists. This reactive approach to change leads to feeling driven by change and at the mercy of the consequences.

The pressure to adapt (sometimes also due to changes in government and new appointments in ministries) means it is necessary to increasingly address the issue of leadership-specific action in times of change. A proactive approach to change and dealing with it successfully are key criteria for success in day-to-day management work. In the long term, only those who act flexibly (not react) and do not fear change as an unreasonable risk but instead recognize it as an inherent element of the system, accept it, and use it to shape the future will be successful.

Experience – not only in education – shows that many change projects fail in practice. Many questions arise in this context. Are the design approaches formulated in the concepts being misapplied in practice? Are the desired change processes too complex and much less plannable or controllable than assumed?

The aim is to analyze the change management processes in educational institutions, focusing on approaches that facilitate their adaptation to constantly changing conditions by creating a proactive, reflective, and learning culture.

Presentation of the main material. Against the background of the dynamic environmental developments in which educational planners and institutions operate, the latter can be assumed to be the case, i.e., that many things can only be controlled to a limited extent.

When looking at change processes in practice, it seems that the complexity of change projects is often underestimated, and too little attention is paid to interactions. The illusion of feasibility and controllability can lead to carelessness at the beginning of a project, which can hardly be corrected later in the change process.

The neglect of the complexity of change processes and the prevailing belief in the feasibility and controllability of change processes can be interpreted as an attempt to explain the failure of many educational innovations. Those affected are often ignored, or the change is started without a goal or plan. The above-mentioned reality of personnel changes in education ministries after elections, resulting in replacing those responsible for education in educational institutions, often leads to rapid innovation and change guidelines that are not or hardly coordinated with the needs of the field and are subsequently not supported in practice. In addition to actively dealing with the resistance that consequently arises in change processes, it is also relevant to ask to what extent employees can and must be committed to the change processes and to what extent they can and should be involved in the planning work and needs assessment. The observation that the education sector is undergoing a continuous change process in many places and that change projects often fail leads to so-called change fatigue in many places.

The topic of change management and the sustainable impact of the corresponding processes is subsequently much-discussed and can be described in a nutshell as the design and management of the continuous change process of organizations. This change process is supported by individuals, groups, and the organization as a whole and enables them to develop further on the basis of self-organized learning processes. This understanding makes an explicit reference to learning in change processes.

According to the observation of constant change in the reality of implementation, however, freezing no longer seems possible. Although it is important for the organizational members' ability to act that a certain degree

of stabilization is restored after each change, the design of change processes today must be understood more as a circular process, since the organization is constantly changing. This assumption makes it seem necessary to understand change management less as a linear process (unfreezing, moving, refreezing) and more as a dynamic process. In many change processes, efforts end up far too quickly with the question of the supposedly right tools. However, the first thing to do is to gain clarity about the problem situation and address the question of the justification for the change project. Therefore, the central question in this first phase would be what should change in the system, the institution, and the understanding of education in the first place. In view of the risk of resistance arising, it is also essential to identify and actively address the expectations and fears of the various stakeholder groups at the beginning of a change project. The subsequent strategy development phase specifies the change objective and implementation procedure. The challenge for those responsible for change lies in developing a comprehensible target image and drafting a jointly supported vision. An implementation strategy must be formulated once a target strategy has been defined. As part of this process, initial considerations can be made regarding the implementation direction. In the education sector, specialists from the field (teachers, school psychologists, parents, and learners) should be involved in a bottom-up strategy, and their experience should be utilized. The aim is, therefore, to win over those involved in shaping the change process. The aim is to incorporate the needs and expectations as well as the operational knowledge of the organizational members to design a change process appropriate to the subject matter. On the basis of the problem definition and the strategic definitions of the change process, the change project is then implemented in the two process steps of diagnostic activities and interventions to achieve the most sustainable implementation possible.

Diagnostic activities serve to determine the initial situation of a change process in order to be able to analyze situation-specific requirements for the design of the change process. During this diagnostic phase, for example, the individual attitudes and behaviors of the various key players in educational work can be considered and analyzed. Whether a change project in the academic organization is successful depends largely on how the behaviors of all individual players change.

Interventions are procedures to initiate, promote, or stabilize changes in educational organizations. For example, interventions in the form of repeated workshops and intensified internal communication can promote the motivation and competence of the individuals concerned. Interventions at a group level primarily serve to overcome paralyzing group pressure and to align the attitudes and behavior of group members with the changed requirements, for example, by means of team development measures. On the other hand, interventions at the organizational level serve to adapt the organizational framework conditions that shape the behavior of individuals and groups.

What is essential, however, is continuous process reflection throughout the entire change process. Today, managers are generally expected to have a high level of reflective competence. Reflective thinking and action in day-to-day work as a leader corresponds to the normative model of a reflective practitioner and must relate to process phases. Reflecting on the problem analysis: «To what extent does the change contribute to solving the existing problems? To what extent does the desired change cause other problems? Reflection on the change strategy: What issues arise when implementing the change strategy? To what extent should the original change strategy be adapted to current developments?». Reflection on the operational design: «To what extent do the interventions achieve the intended effect? To what extent do the interventions support the implementation strategy?». Especially in times of great urgency, such as planning educational implementation at all levels during a pandemic or a war, it is important to consciously create a space for reflection to avoid falling into blind actionism. The logical consequence would be change fatigue among those involved. Constantly questioning the approach to change processes is essential to sustainable change management.

When designing change processes, the question arises as to whether those in the education sector expect others to want to learn new things or to what extent the organization allows, promotes, or prevents learning at all levels. In other words, do those responsible for education have a learning culture for themselves? Especially in change processes that involve a fundamental reorientation of the existing situation, the norms of the existing organizational culture at all institutional levels are experienced as a barrier to achieving the desired change objective. A supportive learning culture focuses on attitudes, values, and prevailing norms towards learning in the organization (or a country's education system in general). It shows the importance of learning for all those involved. Changes can be seen as both conducive to learning but also very quickly as a hindrance to learning. Therefore, all those involved should be informed about upcoming changes early and in advance and prepared for the associated new skills requirements.

Therefore, an anticipatory approach to change is conducive to learning by emphasizing the importance of continuous learning through constantly expanding employees' skills. If, on the other hand, changes are only ever understood and experienced as a quick emergency reaction, change processes tend to hinder learning for the target groups and have little lasting effect. Teachers, for example, will then continue their daily work in the usual rhythm, knowing that another initiative will soon come 'from above' that will be just as unsustainable. In such change

processes, there is also hardly any support for the necessary skills development behavior of those involved, no training and no sufficiently large time window for change.

As mentioned at the beginning, the success of change processes fundamentally depends on the ability of an educational institution to adapt to developments and continue to develop. However, this will only have a lasting effect if there is no rapid top-down implementation but rather a positive learning culture at all levels. Each change process is regularly reflected upon and, if necessary, adapted.

One of the most important aspects of the effectiveness of change implementation is the awareness of the head of the educational institution that his/her management style, in general, and change in particular, largely determines the success or failure of the educational institution as an organization and community in the process of change. Referring to M. Rasfeld and S. Breidenbach (2014), we note the prerequisites for change, which, in our opinion, are the value basis for the practice of positive leadership in the change process. Among them are:

- the ability to think comprehensively, looking ahead;
- the ability to perceive systems interdisciplinarily;
- the ability to get along with other people's life models to develop a common understanding of the big plans;
- the ability to creatively build the desired future; the strength of heart and comprehensive imagination;
- the ability to overcome amateurism;
- the ability to learn from processes and develop on their basis;
- the ability to perceive failure as a chance for innovation;
- the power of vision, courage to act and entrepreneurial spirit.

Given that the positive leadership of the head of an educational institution is the key to the success of a progressive approach to managing change with people at its center, we will focus on several guidelines that will help participants in the educational process feel solidarity in times of change.

Empathy and acceptance: «We are not against changes; we are against losses». Every change that takes place in the activities of an educational institution is a kind of local innovation. The managerial task becomes more complicated when changes of different levels co-occur in an educational institution: from lower-order changes, such as changes in staff qualifications and changes in established procedures, to higher-order changes, including changes in structure, changes in strategy, and changes in organizational culture. Referring to the innovation perception curve (Fig. 1), we note that participants in the educational process may have different attitudes towards change and belong to one group, innovators, early adopters, early majority, late majority, or laggards. Recognizing that resistance is a marker of change (Novi vymohy do kompetentnostei kerivnykiv shkil v Ukraini, 2018) and accepting that an educational institution is a community in which different attitudes toward change are represented is a prerequisite for developing relevant strategies for promoting change from the perspective of recognizing diversity not as a problem but as a resource.
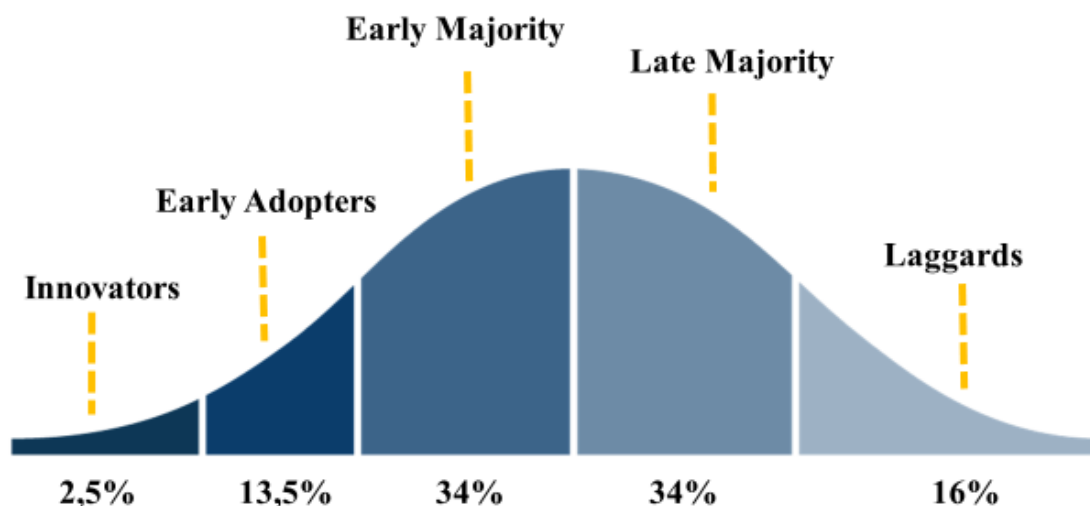

Fig. 1. Innovation perception curve (Rogers, 2003)

Inclusion and assertiveness: «We need a sense of safety and relevant support». Given the existence of different perceptions of change, participants in the educational process have different speeds of passing through its stages, among which, according to the curve of change, the following are distinguished: shock, rejection, resistance, exploration, acceptance and integration (Fig. 2). Therefore, in the process of implementing changes, it should be borne in mind that a sense of stability in the face of uncertainty is provided by such factors as trust and support,

the opportunity to prove oneself, and mutual learning from experience. In addition, a special role is played by the appreciation of the culture of assertive behavior in the community of the educational institution, which includes assertive dispute, assertive defense of one's rights, assertive request, and assertive refusal (Otych et al., 2018). It should be emphasized that assertive behavior is the basis for ethical communication based on making mutually beneficial decisions and maximizing opportunities for constructive cooperation, taking into account the strengths and weaknesses of all those involved in the process of implementing changes.
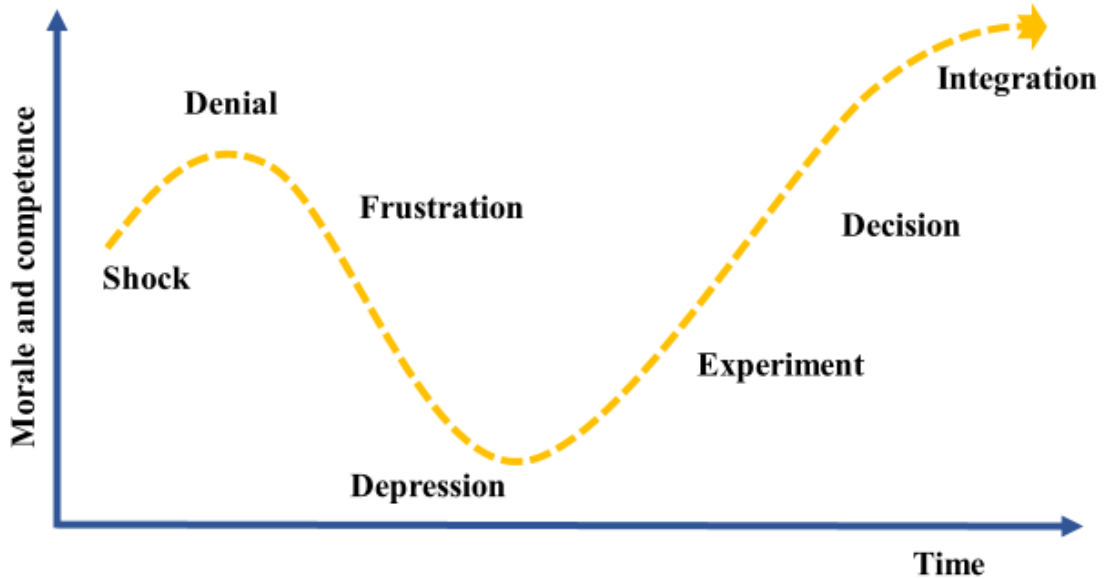
Fig. 2. Change curve (Kübler-Ross, 1969)

Participation and representation: «We strive for equal cooperation and shared responsibility». Given that the participants in the educational process have different visions, missions, and strategies for implementing change, the potential of collective thinking should be tapped into, and human resources should be effectively managed in the process of creating change. Encouragement and motivation to adopt and implement changes largely depend on the possibility of representative participation of educational process participants in decision-making at such stages as identification of the problem, problem formulation, problem analysis, identification of options, analysis of options, selection of an option, implementation of the decision, and monitoring (Trunda et al., 2023). Referring to the model of the paradox of participation (Fig. 3), we note that participants' interest in the educational process directly involved in the changes increases when the changes come to the implementation stage. At the same time, there is a wide range of participatory tools for informing, consulting, joint decision-making, and delegation of authority that allows for equal cooperation at different stages of decision-making in the process of implementing changes.
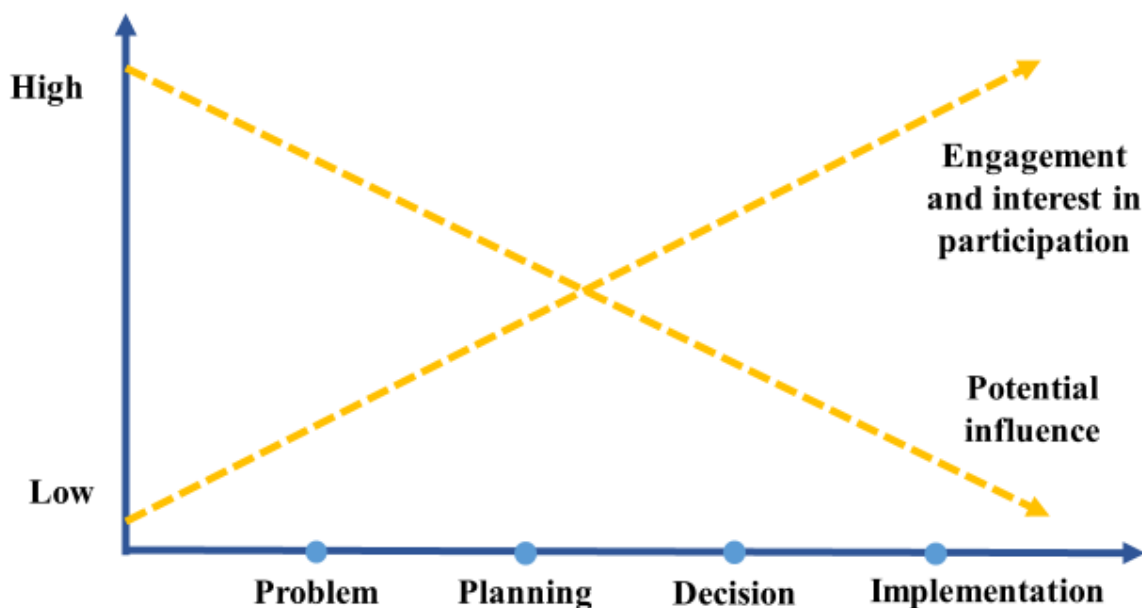
Fig. 3. Paradox of participation (Reinert & Sinnig, 1997)

Given the above, the head of an educational institution needs to realize that he/she is not only a subject but also an object of continuous change, and therefore, in order to accept the new, he/she must consciously say goodbye to the past and tune in to self-development and development of the institution as an organization and community capable of effective communication, cooperation, and conflict management in a continuous synergistic process of analysis, planning, implementation, and reflection on change.

Conclusions. Thus, the success of educational organizations in the process of change depends on their ability to adapt and proactively create a culture of continuous learning. A reactive approach to change often leads to «change fatigue» and inefficiency. To achieve sustainable development, it is important to ensure the participation of all stakeholders, develop reflective thinking, and create conditions for continuous improvement of staff skills, focusing on long-term goals, i.e., to practice a proactive approach to change management based on positive leadership and participatory governance.

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Голлоб Рольф,
доктор наук, професор,
відділу міжнародних проєктів у сфері освіти
Цюрихського педагогічного університету,
Цюрих, Швейцарія
rolf.gollob@phzh.ch

Гриньова Марія Василівна,
завідувач відділу міжнародної співпраці та трансферу інновацій
КЗВО «Одеська академія неперервної освіти Одеської обласної ради»
Одеса, Україна
https://orcid.org/0000-0003-1308-2634
marishagrin@ukr.net

УПРАВЛІННЯ СТАЛИМИ ЗМІНАМИ В ЗАКЛАДАХ ОСВІТИ:

АНАЛІЗУЄМО, ПЛАНУЄМО, ІМПЛЕМЕНТУЄМО, РЕФЛЕКСУЄМО

Анотація. У статті розкривається проблема управління змінами в закладах освіти в умовах постійних соціальних та політичних трансформацій. Сфокусовано увагу на тому, що сучасна освіта стикається з безперервними викликами, які вимагають від керівників закладів освіти здатності адаптуватися до нових обставин та постійно вдосконалювати свої організації. Зауважено, що на практиці зміни часто ініціюються лише у кризових ситуаціях, спричиняючи реактивний підхід та відчуття безсилля перед неминучістю змін. Наголошено, що успіх закладів освіти у процесі змін значною мірою залежить від здатності їхніх керівників проактивно підходити до змін, розробляючи стратегії, які враховують потреби та очікування всіх зацікавлених сторін. На основі аналізу наукових джерел та існуючої управлінської практики встановлено ключову роль позитивного лідерства, партисипативного управління та розвитку людського потенціалу в процесі управління змінами в закладі освіти на засадах стратегічного управління розвитком закладу освіти та розподільної відповідальності за ефективність функціонування закладу освіти в умовах постійних змін. Визначено та схарактеризовано основні чинники, які впливають на якість управління сталими змінами в закладах освіти, особливо в умовах криз, як-от пандемія чи війна, коли необхідність швидких змін може призводити до хаотичних дій, без належної оцінки їх довготривалих наслідків. Серед них: здійснення діагностування вихідних позицій зацікавлених сторін перед початком будь-яких змін з метою виявлення наявних перешкод та планування більш гнучких стратегій; формування культури навчання та залученості до реалізації змін, що допомагає зробити їх більш ефективними і стійкими; проведення інтервенцій – дій, спрямованих на підтримку змін як на рівні окремих осіб, так і на рівні груп та закладу освіти в цілому; забезпечення рефлексивної практики, яка передбачає постійний аналіз процесів, стратегій та інтервенцій на кожному етапі впровадження змін. Зроблено висновки, що зміни в закладах освіти мають сприйматися не як лінійний процес з фіксованими етапами, а як динамічний, безперервний процес навчання, адаптації та розвитку.

Ключові слова: заклад освіти, кризове управління, освітні інновації, партисипативне управління, позитивне лідерство, проактивний підхід до управління змінами, людський ресурс, розподільна відповідальність, стратегічне управління, управління змінами.