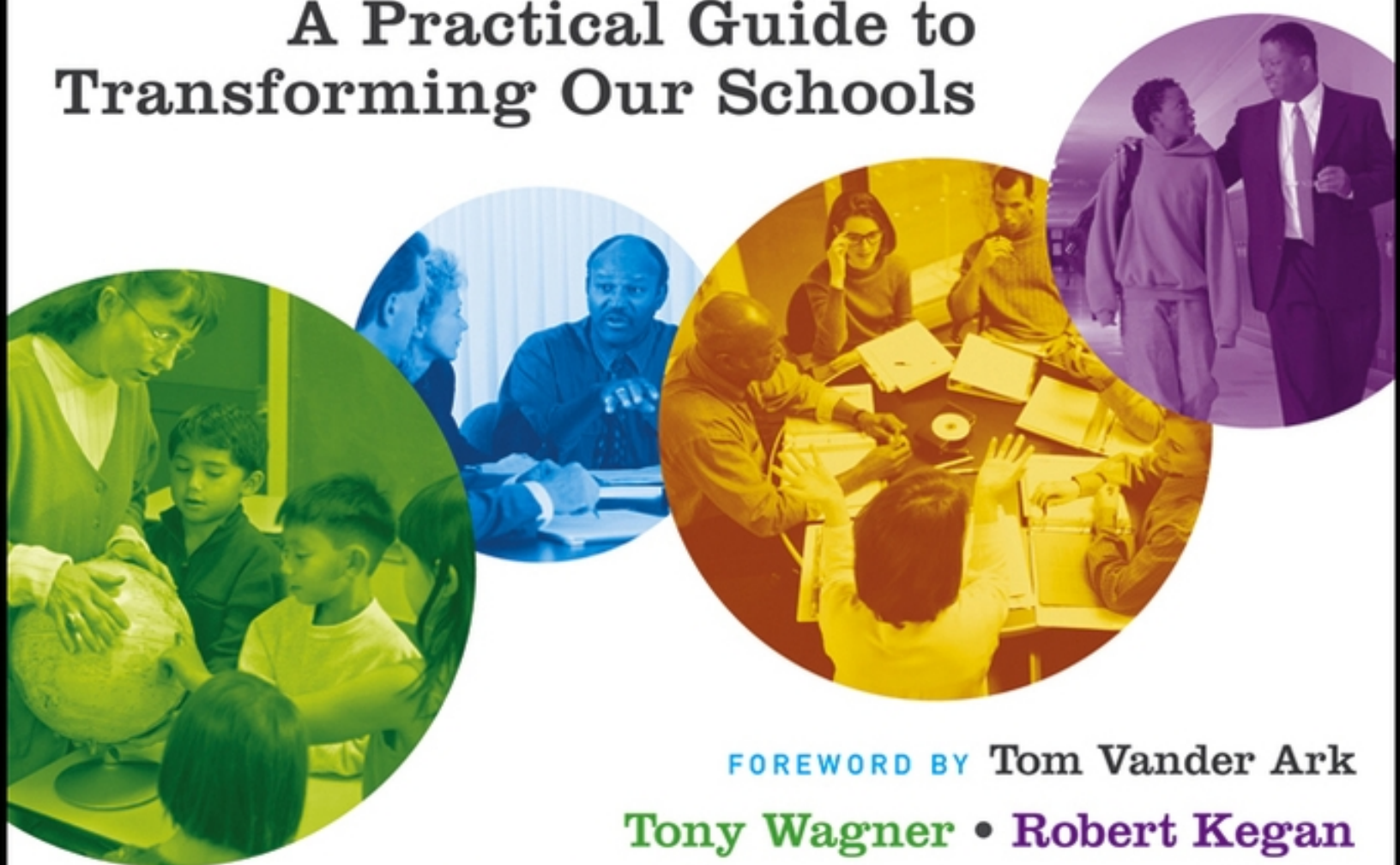


# CHANGE LEADERSHIP

**A Practical Guide to  
Transforming Our Schools**



FOREWORD BY **Tom Vander Ark**

**Tony Wagner** • **Robert Kegan**

**Lisa Lahey** • **Richard W. Lemons** • **Jude Garnier**

**Deborah Helsing** • **Annie Howell** • **Harriette Thurber Rasmussen**

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Published by Jossey-Bass

A Wiley Imprint

989 Market Street, San Francisco, CA 94103-1741

[www.josseybass.com](http://www.josseybass.com)

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Jossey-Bass also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

### **Library of Congress Cataloging-in-Publication Data**

Wagner, Tony.

Change leadership: a practical guide to transforming our schools / Tony Wagner, Robert Kegan.—1st ed.

p. cm.

ISBN-10: 0-7879-7755-1

ISBN-13: 978-0-7879-7755-9

1. School management and organization—United States. 2. Education—Aims and objectives—United States. 3. Educational change—United States. I. Kegan, Robert. II. Title.

LB2805.W315 2006

371.200973—dc22

2005027613

## The Jossey-Bass Education Series

Readers are invited to review and download full-size versions of the exercises in *Change Leadership* to use with their own groups and teams.

If you would like to download and print out an electronic copy of the exercises, please visit <http://www.gse.harvard.edu/clg/news1a.html> or <http://www.josseybass.com/go/changeleadership>

Thank you,

Change Leadership Group

# PREFACE

The need for a dramatically more skilled and highly educated workforce in a global knowledge economy—combined with profound changes in students’ and families’ life circumstances—have created unprecedented demands on education leaders. Although it is increasingly clear that schools and districts must change fundamentally, not just incrementally, most leaders in education are understandably uncertain how they might go about their work differently.

Working to ensure that no child be left behind, struggling to overcome long-standing achievement gaps among racial and ethnic groups, dealing with the expectation that every school make progress annually—school leaders are being asked, in essence, to perform two very different jobs simultaneously.

Imagine being asked to rebuild an airplane—*while you are flying it*. Doing so would be difficult under any circumstances, but even more so if you—as all other hard-working, conscientious pilots—had received all your training in flying the plane *as it is*, rather than also learning how to transform the plane itself. Rebuilding it may require an entirely different set of skills.

Our goal in *Change Leadership* is to help school leaders, and leadership teams, better understand and develop the capacities needed to succeed at their second job of rebuilding the school system—while it operates. We offer a new *systems change* framework for education and a set of tools for leaders who are hard at work rebuilding the plane—while keeping it in the air, loaded with passengers.

The Change Leadership Group has spent the years since 2000 with school and district leaders from all over the

United States—in urban, suburban, and rural districts; in districts with thirty-seven high schools and districts with one; in districts with decent financial resources and those forced to reduce personnel each year despite rising student populations. As different as these settings were, we never found an administrative team that was not working as hard as it could. What we’ve learned is that “improving our schools” on the scale now demanded cannot simply be added to the set of routine responsibilities and activities with which leadership teams in schools and districts are normally occupied. The problem is not lack of hard work, good intentions, or initiative.

We believe the successful leadership of transformational improvement processes in schools and districts requires sharpening capacities in two quite different directions at the same time:

- 1.** Leaders need to see more deeply into why it is so hard for our organizations to change, even when there is a genuine, collective desire to do so. More than just seeing why, leaders need to learn how to take action effectively to help our organizations actually become what they need and want to be.
- 2.** Leaders need to see more deeply into why it is so hard for individuals to change, even when individuals genuinely intend to do so. Beyond this merely diagnostic self-understanding, we as leaders need to learn how to take action effectively to help ourselves become the persons we need and want to be in order to better serve the children and families of our communities.

We must sharpen our capacities in both directions because, in the end, each depends on the other. It may be impossible for us to change at work in the ways we need to without new organizational arrangements, and it may be impossible to bring about significant changes in our

organizations without considering deeply the possibility of our own change.

It is precisely this simultaneous attention to cultivating both a greater organizational savvy and a deeper self-awareness that distinguishes our approach. Not just ends unto themselves, these new forms of organizational and personal knowing are tightly linked to bringing about new results. We deliberately formed the Change Leadership Group to bring together an unusual collection of people knowledgeable about (1) the world of educational reform, (2) organizational development, and (3) adult learning because it was our judgment that many improvement efforts founder on the limitations of a naïve approach to the complications of either organizational or individual change or both. Our goal here is to clearly illuminate what we at the Change Leadership Group call the dual focus—simultaneously sharpening our outward and inward attention. Like any discipline, this dual focus can be learned and develops gradually over time. In *Change Leadership*, we present a variety of ways to help you develop it.

## **HOW DOES *CHANGE LEADERSHIP* WORK?**

As much as possible, we have structured this book to permit you to experience the kinds of learning we seek to promote in our “Learning Labs.” To introduce another metaphor, we often refer to these three-day, interactive learning institutes as a kind of “school improvement fitness center.” We invite leadership teams into a novel environment that will put them to work, individually and collectively, developing new muscles to accomplish their improvement goals.

A natural question is: What can you reasonably hope to accomplish through a single three-day visit to a fitness

center? Obviously, the muscles are not going to be developed in that time. The more reasonable expectation is that you will meet a series of “machines” (tools for development), begin to familiarize yourself with how they work and how to use them, and experience a comprehensive workout routine. Truth be told, you might also expect to be a little sore after the first exposure from all the stretching. But adhere to your new routine, use the tools, and over time, you will develop new capacities.

This metaphor of the fitness center should help make clear both what this book is and what it is not. It is not another treatise—a ten-chapter analysis, argument, or illustration of what is “wrong with our schools.” (“Here’s why they don’t work. Here’s what they should look like. You take it from here.”) Nor is it a point-to-point road map to guide you through an improvement process. Rather, it is a guide to help you develop the capacities that we believe—based on experience—will better enable you to lay down your own best road to the transformation of your school or district.

As a guide to the development of leadership capacities for transforming our schools (what we mean by “change leadership”), this book combines the conceptual with the practical, the thinking with doing. We present a set of practical concepts, invite you to “think about them by doing,” and then, in your own change leadership work, to “do by thinking” of the concepts that will gradually become more familiar to you.

Our framework includes several concepts that we introduce one by one, in paired chapters. Throughout the book, you are invited onto different “exercise machines,” each chapter exercising a different “muscle group” of the single “body.” This is why we really mean it when we say that if you are tired after the work of one chapter, you should rest and recharge before you go on to the next. It is best to come to each chapter fresh and energized, because

each is “working you out” in a different way. We urge you not to race through the book or merely skim for the developing ideas. Instead, take the time to assimilate the concepts and to complete the exercises. With this combined effort, you will develop the capacities to make full use of the concepts.



# HOW IS THE BOOK ORGANIZED?

In Chapter One, we provide background for the lessons of the book. We consider some of the fundamental economic and social changes of the last quarter century as they relate to education, and make the case that the nature of these changes transforms what has been described as the education “problem” from one of mere failure demanding “reform” to obsolescence requiring “reinvention.” At the end of this chapter, we invite you to frame your school’s or district’s education “problem” as a challenge that you can work on throughout the book, using the tools in successive chapters.

In the four sets of paired chapters that follow, we describe key organizational improvement challenges for schools and districts. In these core chapters, we provide you with a series of diagnostic tools and exercises to help you identify more clearly what you want to work on in your school or district and how you can go about this work in a new way. To explore the dynamic, interdependent relationship between individual and organizational change, we describe the experiences of a superintendent, whom we call Arthur. We describe in detail how he uncovered—and worked to overcome—those personal beliefs and behaviors he discovered stood in the way of his being a more effective leader of educational change. We also provide stories from a variety of schools and districts across the country. In each of these chapters, we present a progressive series of exercises that can lead you to deeper insights into your own personal learning challenges as they connect to your school’s or district’s ability to improve. Separate exercises are designed to exercise your “outer” and “inner” attention, the

organizational and personal learning aspects of the theme for each set of chapters.

Chapter Two makes the case for a laserlike focus on the improvement of teaching as the goal of a change process, and describes what a system that is designed for continuous improvement of instruction and instructional leadership might look like. The chapter is designed to help you assess the current status of your work related to improving teaching. In Chapter Three, we introduce the first step of an unfolding process designed to illuminate your own personal learning challenge, your inner challenge, as it relates to improving teaching and learning in your school or district.



Chapter Four takes up the question of what often gets in the way of change in schools and districts and, conversely, what generates the momentum and energy for successful initiatives. In Chapter Five, we ask you to take a second step in developing your personal learning curriculum by identifying what may be getting in the way of your working more effectively.

Chapter Six lays out a systemic model for thinking about the arenas of change in education and the ways in which they are interdependent and overlap as a system. We discuss competencies, conditions, culture, and context as necessary parts of transformation. In this chapter and in Chapter Seven, we help you create a sharper picture of your own system, organizationally and personally, to see more deeply into these outer and inner dimensions.


Chapter Eight outlines critical elements of a more strategic approach to the change work—starting and intervention points, and the sequencing of important steps. We describe the phases of a successful, sustainable change process, and we explore the importance of data, accountability, and relationships in each phase. These concepts are presented through case studies of two districts illustrating the different elements of our model and showing how they look in

practice. Chapter Nine provides ways to help you work strategically at overturning your own individual immunities to change. It concludes with recommendations for how to enable success in your self-learning curriculum.

Chapter Ten explicitly brings together the two parallel outer and inner threads that we discuss throughout the book—the twin challenges of organizational change and personal growth. In this concluding chapter, we consider the implications of the dual focus for education leaders in the twenty-first century.

Throughout *Change Leadership*, we include diagnostic tools, exercises, and links to additional materials to further your understanding of both the system at large and your personal system. All the tools intended for individual use only are marked with an “individual” icon ; many of the tools are also adaptable for group use, and where that is the case you will also find a group icon,  which is your signal that, in Appendix A, you will find this same tool modified for use in groups or teams. It is our belief that you will gain more from this book if you actively engage the exercises included throughout the chapters. To aid this process, you can download full-page templates of each exercise that provide space for your own writing from both the Change Leadership Group

(<http://www.gse.harvard.edu/clg/news1a.html>; click on “Exercise Templates”) and Jossey-Bass (<http://www.josseybass.com/go/changeleadership>).

Additionally, because you might want to put colleagues or other district members on these “workout machines,” we highlight a few exercises that we have learned may be especially challenging for an unskilled user to help a fellow first-time user with. We mark these exercises with a “caution” icon  to signal the importance of your taking stock of your comfort and skill level with the material in order to decide whether to ask someone else to engage it.

We also provide a variety of examples from our practice. When we identify people with their full name and affiliation it is with their permission. In other cases, either to preserve privacy or because the person is an amalgam of real people with whom we have worked, we have used a first name only. Appendixes provide exercises to use in groups, as well as a list of recommended readings, grouped by topic.

## **HOW TO MAKE BEST USE OF THIS BOOK**

We recognize that many people will read this book on their own and have therefore designed the activities so that they will be meaningful and valuable to the individual reader. But, for the same reasons that we strongly encourage people to come to our Learning Labs in teams, we encourage you to engage in this work together with others. You might form an ad hoc group, where you gather interested colleagues in your school or district and use this book as the focus of a study group. You can then all benefit from trying on ideas, learning from your discussions, and encouraging each other.

For those of you who are in a leadership team, we recommend that you and your whole team read *Change Leadership* together. Individually and as a group, you will get even more out of this book if you read it, complete all of the exercises, and take the time to collectively think through the implications of what you are learning for how to lead. This suggestion of a “group read” follows from our understanding that to meet the new challenge of reaching all students with new skills, we need to work in fundamentally new ways ourselves. No one person can solve this new challenge; neither can individuals working

alone. We need each other, and we need to work together in new ways. Reading and learning together is a start.

Although you may already serve on some kind of central office or school-based management team, our observation is that meetings of these groups usually deal with administrative matters or “crisis management” rather than with the more substantive problems of change leadership—much in the way that most faculty meetings are often taken up with announcements rather than discussions related to improvement of teaching and learning. The work in education at every level remains highly isolated, compartmentalized, and increasingly crisis driven.

A central idea throughout this book concerns the way leadership teams themselves may need to reorganize the way they operate when they are at work on their second job—that of remaking the school or district at the same time they are running it. Because these groups will need to create new individual and organizational capacities (not merely apply existing capacities to a new task), they may need to reflect the features of a learning community, such as we see in the growth of teachers’ professional learning communities, critical friends groups, or the Japanese lesson study process. But they need to be something more, as well.

Looking at the profound transformation in how work is organized in most other professions over the last quarter century, we can see additional qualities an effective team must have. From law to law enforcement, to business, to medicine, individuals increasingly work in teams to solve problems, improve services, and collaboratively create new knowledge. The simple reason why most work is now organized around team structures is that focused, disciplined groups are far more likely to generate a better result than can individuals working alone. Communities of practice—groups “bound together by shared expertise and shared passion for a joint enterprise”<sup>1</sup>—are increasingly

used in a wide variety of workplace settings to enable individuals and organizations to learn new skills and processes and to identify and address ongoing problems of practice. According to Wenger and Snyder, communities of practice help drive strategy, start new lines of business (or inquiry), solve problems quickly, transfer best practices, develop professional skills, and recruit and train talent.<sup>2</sup>

Thus, the leadership teams we are advocating are not voluntary groups, nor are they focused on their own learning as an end unto itself. They exist to transform the larger system, the school or district. This may well require individual learning and change. But it is always tightly connected to their charge—to make something valuable happen in the schools or districts they lead. As such, they must also reflect the features of high-performing executive teams at work on transformational change. We call these new kinds of leadership groups, which combine the work of leaderly learning with effective execution for systemwide improvement, leadership practice communities.

However you approach the information we present, we welcome you. We hope you will experience us as with you all along the way, encouraging your workout. May *Change Leadership* work for you as a renewable resource—more than a structured single visit to the gym, a guide to a new kind of ongoing leadership practice.

## Endnotes

<sup>1</sup> Etienne Wenger and William Snyder, “Communities of Practice: The Organizational Frontier,” *Harvard Business Review* (January-February 2000): 139.

<sup>2</sup> Ibid., 140–141.

# FOREWORD

**By Tom Vander Ark**

*Executive Director, Education*

*Bill & Melinda Gates Foundation*

After spending a long weekend attempting to summarize what I thought we had learned about leading high-performing districts, I read this book and drew three conclusions. First, this work is hard—it's complicated, technical, personal, and political. Second, with so few people studying what may be the most important domestic issue of our time, we're all fortunate that the Change Leadership Group (CLG) has spent the last five years working on educational success at scale and on the leadership necessary to create it. And third, it wasn't the architectural blueprint I expected five years ago, but probably better and more appropriate to the challenge.

School districts are a complicated American anachronism. Despite the recent aggregation of control to the state and federal level, we rely more heavily on local educational authorities than any other developed country. Although many state constitutions acknowledge public education as the paramount duty of the state, we rest the responsibility for policy, service delivery, employment, and real estate development with local districts. Our history of local control has proven to be a blessing and a curse—a building block of democracy and a stumbling block (at least in some cases) to creating a system of public education of consistently high quality. Today, many principals are subjected to six accountability systems: local, state, and federal compliance regulations, and local, state, and federal outcome requirements. The potential of new data systems, the

challenges of school choice, and budget problems add to the confusion. The difficult process of aligning and streamlining these policies and systems will (or should) occupy the second half of this decade. This policy debate could easily take place without improving teaching.

That's where this book comes in handy. It's only about instructional leadership. It doesn't debate policy, doesn't contemplate the role or architecture of districts, and it doesn't tell you how to make AYP (average yearly progress) (but you will if you do what it says). It tells you how to improve the quality of instruction by becoming an effective instructional leader.

I wish it were simple, but it's not. When I made this grant five years ago, I wasn't quite sure what to expect (I've since hired a bunch of people who ask far more specific questions than I did). I thought it would result in a training program for people trying to help improve schools, and assumed there would be a methodology behind it—a "how-to" guide. To some extent CLG has done both, but this isn't a school improvement cookbook. It's a framework full of pointed questions that thoughtful groups of education leaders should ask themselves about their work.

This book does suggest that there is a necessary progression to the work of system improvement:

- 1.** Preparing for change by answering the "why change?" question
- 2.** Including others and building the systems capacity for improvement
- 3.** Improving instruction

It emphasizes the danger of jumping to doing without preparing. This point is important enough that it warrants a short story.

As Dick Elmore frequently does, this book highlights the important work that Tony Alvarado did in District 2 in New York. It's one of the best examples of instructional



leadership in the country. Tony promoted adult learning about instruction, which resulted in powerful agreements, which led to the development of strong instructional practices. When Alan Bersin lured Tony to San Diego, he imported a decade of learning about instructional leadership and encapsulated it in a Blueprint. They “jolted” the system by jumping right into phase three, implementation, while quickly building capacity to improve instructional leadership (phase two). The “bet” was that early results would build support for the radical surgery being done on the system. A regime of what has come to be called “managed instruction” was implemented with major budget realignments (which means hundreds of people lost their jobs) and a new set of priorities. Five foundations invested over \$50 million in the most elegant instructional improvement plan ever devised. Several years later they were both out of work and the board was dismantling the plan. In between, teachers and some parents complained bitterly about the top-down reforms, and results failed to gain the expected level of community support.

What can we learn from this case? First, best practices don’t travel well. At least not without a culture of engaged adult learners and the commitments that they are able to make. Second, change won’t happen unless you help the community answer the question, “why change?” Third, context matters—a lot.

There may be a fourth lesson. Being president of the United States may be the only job that’s tougher than being a school superintendent. Roy Romer will tell you that it’s harder than being governor. John Stanford said it’s harder than being a general. I know it’s harder than running a big corporation.

More than a money problem or a people problem, I think we have a design problem. As the CLG team points out, superintendents have to run the system we have while

leading the creation of the system we need. We group kids by age and march them through the same experiences through sixth grade assuming most will get what they need, then we increasingly allow them to assemble courses of optional degrees of difficulty taught by people who hardly know each other, much less the 150 kids they see every day. And we wonder why all kids aren't reaching high standards. This appeared to me to be primarily an architecture problem. With many of our early grants, I encouraged people to fix the architecture. Several years later many of those folks are stuck in architectural arguments and never got to the heart of the issue—teaching for learning. If, as this book suggests, you take the time to prepare and include, and then focus on improving instruction, you'll tackle the architecture as needed and do it with a sense of purpose. You'll have the momentum of engagement and improvement behind you when you get there.

Tony Wagner sent me a poem a few years ago that describes a great learning environment better than anything else I've read before or since. Rabindranath Tagore wrote it as a prayer for his country. It captures my hopes and aspirations for the schools and districts we work with.

Where the mind is without fear  
And the head is held high,  
Where knowledge is free;  
Where the world has not been broken  
Up into fragments by narrow domestic Walls;  
Where words come out from the depth of truth;  
Where tireless striving  
Stretches its arms towards perfection;  
Where the clear stream of reason  
Has not lost its way into the  
dreary desert sand of dead habit;

Where the mind is led forward  
By thee into ever-widening  
Thought and action—  
Into that heaven of freedom,  
My Father,  
Let my country awake.  
Rabindranath Tagore, "Gitanjali 35"

Thank you for awakening and for reading this book. You must care about or be involved in educational leadership. Making systems of schools work for all kids is the most important economic development, social justice, and civil society issue of our time. It's complicated and difficult work, but it's the most important thing you could be doing with your life.

# ACKNOWLEDGMENTS

Were it not for the bold generosity of the Bill & Melinda Gates Foundation, there would be no Change Leadership Group at the Harvard University Graduate School of Education. Because of the foundation's support, and particularly that of its director of education, Tom Vander Ark, an interdisciplinary team has been at work for the last five years seeking to develop practical knowledge that will be of immediate use to school leaders working at systemwide improvement. We thank Tom for his many contributions, especially his consistently constructive impatience, and his thoughtful Foreword to this book.

In developing and "field-testing" the change concepts and practical tools you will encounter in this book, our group became indebted to a host of colleagues and district settings. Although none should bear any responsibility for the limitations of what you will find here, all have contributed to strengthening our framework and the means for applying it.

In our first years we gathered two groups of distinguished practitioners to try on, react to, and make suggestions about our developing ideas. We met several times on either coast, and they came to be called our "West Coast Fellows" and our "East Coast Fellows." For their many contributions to our thinking and our spirits, we want to thank East Coast Fellows Rebecca Bradley, Gerry House, Steve Jubb, Bob Mackin, Bob McCarthy, Gene Thompson-Grove, and Ron Walker; and West Coast Fellows Sally Anderson, Roger Erskine, Chuck Hayward, Judy Heinrich, Connie Hoffman, Kent Holloway, Jim Huge, Rick Lear, Michele Malarney, Judy Ness, Harriette Thurber Rasmussen, George Woodruff, and Leslie Rennie-Hill.

We also had the privilege of working over several years with the brave leadership teams of three generous districts that were willing to partner with us as “beta sites” to try on and test out earlier versions of the materials you will find here. We are deeply grateful to the school districts of West Clermont, Ohio; Corning, New York; and Grand Rapids, Michigan, and to all the leaders in each of these districts who became, in effect, our collaborators. We especially want to acknowledge our collaboration with West Clermont Superintendent Michael Ward and Assistant Superintendent Mary Ellen Steele-Pierce; Corning-Painted Post District Superintendents Donald Trombley and Judy Staples; Corning District’s Quantum Leap Project Executive Committee, including Assistant Superintendent Ellen Robinson (Committee Chair), Billie Gammara, Mike Ginalski, Cheryl Jordan, Rick Kimble, Bill Losinger, Mat McGarrity, and Bob Rossi; and Grand Rapids Superintendent Bert Bleke, Director of Organizational Learning Mary Jo Kuhlman, Deputy Superintendent Charles Sturdyvant, Chief Academic Officer John Harberts, and Chief Operations Officer Ben Emdin.

We learned a great deal from our relationship with “change leaders” from ten districts or district-serving organizations, each of which sent small, continuing teams to our Change Leadership Program, twice a year, a week at a time, over two years. We stayed connected with these leaders between “residencies” throughout the two years, and a form of this colearning network continues to this day. This group engaged and improved every concept and tool you will find in this book. We want to thank these colleagues from the Connecticut Center for School Change; the Corning-Painted Post Area School District of Corning, New York; Deer Park City Schools of Cincinnati; EdVisions, Inc., of Henderson, Minnesota; the Evergreen School District of Vancouver, Washington; Gloucester, Massachusetts, Public Schools; Hamilton County Public Schools of Chattanooga,

Tennessee; Houston Independent School District; Kent Intermediate School District and Grand Rapids Public Schools of Eastern Michigan; and the Stonington, Connecticut, Public Schools.

Throughout our work we have been well served by a highly eclectic advisory board drawn from the worlds of practice and scholarship in the fields of education, business, organizational development, and leadership studies. We very much want to thank Advisory Board members Katherine Boles, James P. Comer, John E. Deasy, Linda Darling-Hammond, Richard F. Elmore, Ronald A. Heifetz, N. Gerry House, Michael Jung, Diana Lam, Katherine K. Merseeth, Richard Murnane, Jerome T. Murphy, Pedro A. Noguera, Thomas W. Payzant, Hillary Pennington, Robert S. Peterkin, Robert B. Schwartz, Peter M. Senge, Nancy Faust Sizer, Theodore R. Sizer, Ron Walker, and Patricia A. Wasley.

We could not have done the work that led to this book without superior institutional support for the Change Leadership Group. We want to thank former Harvard University Graduate School of Education deans Jerome Murphy and Ellen Lagemann; former director of the school's Programs in Professional Development, Clifford Baden; and our own outstanding administrators over these years, Genet Jeanjean, Elena Demur, Kathrine Livingston, Shelley Lawson, and Rebecca Udler.

Our doctoral fellows, Dana Wright and Elizabeth Zachry, read every line of this book several times over and, through their suggestions, made the final product a better one. We are also very grateful to Lesley Iura at Jossey-Bass for the many ways in which she has expressed her belief in, and support for, this project and to freelance developmental editor Jan Hunter for her excellent work. Together, Lesley and Jan have helped make this book more readable and appealing to a broader audience.