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Identity as the foundation for change in school systems

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IDENTITY AS THE FOUNDATION FOR CHANGE IN SCHOOL SYSTEMS

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Abstract

Citizens, politicians, scholars, and educators agree that the nation's educational system is failing to serve our youth. Despite energy, resources, research, and readiness, schools remain unchanged and ineffective. This study builds on existing research in the corporate landscape about the role identity plays in an organization's capability to change. The school system has not made a distinct statement about what it stands for. The researcher hypothesized that a clear identity will better prepare the educational system and schools within it to implement change effectively.

The study explored the question, "Does a clear identity better equip a school to implement change?" through a publicly chartered school in New Orleans, Louisiana. The study used action research and a qualitative and quantitative survey methodology adopted from existing models to measure the identity and agility of the school. Data were analyzed and fed back to the organization's leadership to inform the findings, raise awareness about the concepts, and drive change.

Findings indicated that while the school had strong identifying values and demonstrated components of agility, it had room for improvement in both. The head of school expressed an interest in enhancing the school's identity and adopting more change-friendly behaviors. The link between identity and agility may exist, but further research should be conducted to obtain a larger data set and measure these concepts over time.

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Chapter 1

Introduction

John Fitzgerald Kennedy said in 1963, “Children are the world‘s most valuable resource and its best hope for the future” (UNICEF Appeal for Funds, July 25, 1963). Society consistently echoes this sentiment, yet in a 2008 poll, 80% of Americans gave public schools a grade of C or worse (EducationNext, 2008). President Barack Obama agreed and claimed in his 2009 inauguration speech,”Our schools fail too many” (Inaugural Address, January 20, 2009). Tony Wagner, co-director of the Change Leadership Group at the Harvard Graduate School of Education, claims that the nation is at risk as a result of our outdated school system: ”America‘s problem is that the future of our economy, the strength of our democracy, and perhaps even the health of the planet‘s ecosystems depend on educating future generations in ways very different from how many of us were schooled” (Wagner, 2008, p. xxi).

The country has spoken loudly and clearly about the deficiency of the education system, but if each citizen was asked, “What does our education system stand for?” any one of the following answers could result:

- Schools should prepare students to achieve sufficient test scores.
- Schools should prepare students for higher education.
- Schools should prepare students to support the current and future needs of the country.
- Schools should challenge children.
- Schools should support different learning styles.

- Schools should help children to have high self-esteem and good critical thinking skills.
- Schools should work with parents to provide a seamless support system for the child.
- Schools should be a substitute for parents who cannot provide a strong support system.
- Schools should expose children to different ways of thinking.
- Schools should teach children how to think.

Each response is legitimate, but most are at odds with one another. For example, an emphasis on standardized test scores may not serve the students with different learning styles or challenge the academically stronger students in a class. The education system has become in many ways a “catchall” for the needs of society. However, without a clear identity, the system may not be able to catch anything well.

Historical and Social Landscape

The education system created in the 19th century had a clear purpose: to end child labor abuse and prepare people for industrial labor (Senge, 2000). The labor market required basic skills, and schools met those needs. By 1950, half of the 18-year-olds in industrialized nations expected to graduate secondary school; many of these people got relatively good jobs even though they had little more than sixth-grade math and reading skills (Senge, 2000).

As the world has evolved, organizations have replaced transactional jobs with technology or moved them to developing countries (Senge, 2000). This has

significantly raised the bar for employable skills in developed countries. For example, a factory job in the United States today might require a grasp of statistics (for quality control), a 12th-grade reading level (for complex, evolving machine instructions), a basic background in physics, some programming, and possibly a foreign language (to telecommunicate with their counterparts off shore) (Senge, 2000). The labor market has shifted, as has the larger social landscape. Significant changes in family structure, advanced trends in television and popular culture, poverty, violence, teenage pregnancy, and substance abuse expose children to new and complex conditions.

Despite radical changes to the labor market as well as the landscape in which today‘s children live, the school system still generally operates within the same model. “Rooted in the industrial age, assembly-line concepts of education are still deeply embedded in many schools even though the circumstances upon which these concepts were based have disappeared or changed dramatically” (Cummings & Worley, 2008, p. 659). Senge (2000) stated, “Schools that train people to obey authority and follow the rules unquestioningly will have poorly prepared their students for the evolving world they will live in” (p. 7). Canton (2006) pointed out that the crisis of education is one of the top trends that will shape the future of America. He believes the quality of public education will either propel or crash the future aspirations of the American workforce.

Purpose and Importance of This Research

Scholars, educators, political leaders, and citizens agree about the need to change schools as we know them; however, they have failed to actually change much. Some authors believe that the rate at which teachers learn and

implement research-validated practices is disappointing (Knight, 1998). Other authors are more cautious, suggesting that while some school leaders are trying to place their institutions on the frontier of change, they face intense pressure to slow down change, to be conservative, to reinforce traditional practices, and not to leave anyone behind (Senge, 2000). Today‘s advanced and complex demands are a reality of the external environment in which schools sit, so the system needs to determine how to respond. Before real change can occur; however, the system must determine why it exists. There are many opinions about what value a school should provide, yet because these opinions often conflict with one another, they create unsustainable pressures on the system. Without a clear identity, stakeholders are at odds with one another, and systems remain idle. This study focuses on two key concepts that relate to this phenomenon: identity and agility.

Identity

Identity is defined as “that rich and varied set of characteristics that fuels differentiation and fires contribution” (Ackerman, 2000, p. x). It answers questions like, ”Who are we?” ”What do we stand for?” and “What are we not?” Ackerman (2000) believes leaders need to recognize that identity shapes the success of organizations as well as everyone whose lives they touch. Research conducted by the Conference Board in June 1999 suggested that a firm‘s identity, core values, and business strategy help to support a shared view among all employees (Conference Board, 1999).

While the external environment constantly changes, identity rarely does. When employees understand their organization‘s identity and know that it is protected, they feel free to innovate and push the boundaries of what is possible (Lawler & Worley, 2006). Identity is critical to an organization because it helps individuals within it make sense of the complexity that is beyond their control and move the organization forward.

Agility

Agility has been defined as an organization‘s ability to change tactics or direction quickly; to anticipate, adapt to, and react decisively to events in the business environment (McKinsey Global, 2006). For the purposes of this research, *agility* represents an organization‘s ability to implement change and respond to the evolving needs of the environment (Lawler & Worley, 2006).

Research Question

The roles of identity and agility have proven significant in organizations (Lawler & Worley, 2006), but how do they impact a school system? The researcher believes that the education system‘s struggle to evolve may be a result of its lack of identity. This research addresses the question: ”Does a clear identity better equip a school to implement change?”

This question can be applied at a macro-level to help the entire education system orient around a clear value proposition, but this research focuses on individual schools as a microcosm of the larger system. The researcher explored the relationship between a school’s identity and ability to be more agile. It was hypothesized that schools without a clear identity are less agile and therefore struggle to meet success over time. Today‘s educational leaders are

pulled in many different directions, so determining the role of identity in a school system is critical. If a correlation between identity and agility is supported, leaders will understand the significance of gaining clarity on their identity as a means of better prioritizing their efforts.

Research Setting

For this study, identity and its relationship to change was studied in a chartered school system. A public chartered school is a publicly funded school that has been granted a charter exempting it from selected state or local rules and regulations. A chartered school may be newly created, or it may previously have been a public or private school. It is typically governed by a group or organization (for example, a group of educators, a corporation, or a university) under a contract or charter with the state. In return for funding and autonomy, the chartered school must meet accountability standards. A school's charter is reviewed regularly and can be revoked if guidelines on curriculum and management are not followed or the standards are not met (National Assessment of Education Progress, 2009). Chartered schools were appropriate for this research for the following reasons:

- They represent both the population that utilizes publicly funded schooling and the structure of private schools.
- They have more autonomy to implement changes than a traditional public school. They are typically non-unionized.
- They are growing significantly. Since 2007-08, the charter student population has grown 11% and the number of public chartered schools has grown 8%. More than 1.4 million students now attend

over 4,600 public chartered schools in 40 states and the District of Columbia (National Alliance for Public Charter Schools, 2009).

- The Obama administration strongly advocates the chartered model as a way to introduce competition into public education. Five billion dollars in federal stimulus funds was available for states as an incentive to increase their number of chartered schools.
- Given their infancy and experiential nature, they are generally open to researchers.

The specific school of study is located in New Orleans, Louisiana, a significant location for the chartered school movement. In New Orleans, the public school system was taken over by the state Board of Education following Hurricane Katrina. The state realized many of its public schools were not meeting minimum academic standards, but the natural disaster compounded the issue by displacing teachers and administrators and destroying buildings. Children returning to the area after the storm were without a stable institution for learning. To mobilize resources quickly and effectively, the Recovery School District was formed and began offering charters to individuals and groups who wanted to start a school. Chartered schools now serve over 60% of students in New Orleans.

Lafayette Academy Charter School (LACS), a typical chartered school in New Orleans, was chosen to provide the target population in this study. It was recommended by other educational leaders because of the head of school‘s commitment to reforming the school and support for educational research. The head of school has also worked with the researcher in other forums and was

interested in the topic of study. LACS was opened as a public charter in 2006 after its predecessor, Lafayette Elementary, was closed down. It is currently funded by the state, governed by an independent Board of Directors, and operated by an education management company.

In its first year of operation, only 33% of students passed state-wide standards tests. One year later, 82% passed, and in the last year of testing, 98.9% passed. The enhanced scores are just one indicator of the school‘s focus on improvement and change. It has also incorporated innovative curriculum and won awards from local associations for its commitment to excellent education. LACS is the largest elementary school in New Orleans, serving 780 children in pre-kindergarten through seventh grade. It is open-enrollment school, so any child who wishes to attend is accepted. It has a 9:1 student/teacher ratio and 103 full-time members of the faculty, staff, and administration.

Within LACS, the researcher collected data about the school‘s identity as well as its appetite for and ability to change. The researcher then assessed connections between the school‘s agility and identity.

Outline of the Study

The remainder of the study attempts to determine the impact of identity on a school system‘s ability to change. Chapter 2 provides a review of related literature, linking past research to the current subject and noting relevant gaps. Chapter 3 provides more details into the methodology and describes why the approach was chosen. Chapter 4 reviews the results of the study, describing the data that were collected and any analyses that were conducted. Chapter 5 discusses key findings, implications, recommendations, and limitations.

Chapter 2

Review of Related Literature

This chapter examines existing literature related to the question: Does a clear identity better equip a school to implement change? The chapter reviews literature related to the following: (a) the role of identity in organizations, (b) the role of identity in schools, (c) the concept of agility in organizations, and (d) the concept of agility in schools. The review then explores the connection between identity and agility. The chapter also surfaces specific gaps in the current literature, which this study attempts to fill.

Identity in Organizations

The idea of corporate identity is rooted in graphic design, as it was originally associated with logos, brands, and nomenclature (van Riel & Balmer, 1997). Olins (1978) classified visual identity into three main types—the reflection of an organization‘s strategy, branding, and communication policies. The understanding of corporate identity has gradually broadened across disciplines and now encompasses what an organization reveals about itself through a mix of its behavior, communications, and symbolism to internal and external audiences. Multiple scholars conclude that corporate identity management is a multidisciplinary approach of strategic-level importance (van Riel & Balmer, 1997).

Several methods have been developed with the objective of revealing an organization‘s identity. Methods traditionally come from consumer behavior research, focusing on the external identity; however, they have been adopted to focus on the internal identity as well (van Riel & Balmer, 1997).

Identity in its current form is typically that which is central, enduring, and distinctive about an organization (Albert & Whetten, 1985). Ackerman (2000) described an organization‘s identity as ”the source of value it is capable of creating in its world” (p. 26). He drew a parallel between this and the meaning of identity in the field of human behavior and psychology. It is the single most powerful force of behavior because it reflects the things that make a person unique, the traits that fuel differentiation and inspire contribution. He encouraged leaders to recognize the significance of identity for “corporate beings” as well.

Lawler and Worley (2006) tied critical aspects of management to identity, defining it as “an overarching and relatively enduring statement of how it will achieve its long-term mission” (p. 33). “Mission” and “Identity” are often used interchangeably, yet mission implies aspiration and that the organization is in control of its creation and destiny. Identity extends beyond aspirational statements. It also derives from competitor and customer perceptions of the organization.

Culture is a component of identity and may be used synonymously in corporate environments. It has been defined in many ways, including the web of significance from which people are suspended (Geertz, 1973); shared beliefs and values that closely knit a community together (Deal & Kennedy, 1982); and a pattern of basic assumptions to cope with problems (Schein, 1985). Culture differs from identity in that it has varying levels of awareness. It manifests in behaviors, artifacts, values, and underlying assumptions (Schein, 1985). Identity is an expression of cultural understanding but also assumes awareness and

more active control. An organization can make a decisive statement about who it is and who it wants to be (Ackerman, 2000). Through reflection, identity is embedded in culture, but it is not solely determined by culture (Hatch & Schultz, 2002).

The impact of identity on an organization is significant because it increases effectiveness by clarifying an organization‘s dominant approach to doing business (Lawler & Worley, 2006). Identity is critical for performance because, “when an organization tries to be something that betrays its identity, successful execution of an intended strategy can be thwarted by turnover, sabotage, incompetence, and reduced productivity and quality” (Lawler & Worley, 2006, p. 34).

Identity in Schools

Research has not specifically addressed the concept of identity within schools. It has, however, recognized related concepts such as purpose, shared vision, and culture. The history and implications of each of these topics are explored below and summarized in Table 1.

The original unifying purpose of education, established after the American Revolution, was democracy: “to prepare young people through a liberal education to participate in an idea far bigger than themselves, that would unite them with other people and ready them for participation in the new form of government” (Durden, 2010, p. 32). Scholarly subjects were originally scrutinized and chosen based on their ability to create informed, active citizens of a democracy. Today‘s schools have moved far away from this purpose and

Table 1

Topics Related to Identity in Schools

Version of Identity	Author(s)	Implications
Purpose	Damon (2008) Durden (2010)	The original intent of education was to prepare active citizens, then to support technical competence and specialization of skills. Students lack understanding of the purpose of their studies in today's world. Primary, secondary, and higher education lack a unifying objective for education.
Vision	Senge (2000) Knight (1998) Reigeluth (2006) Marino (2007)	Stated aspirations for a school create alignment and commitment among stakeholders.
Culture	Schein (1985) Deal, Peterson (1999) Van der Westhuizen, et al. (2005)	Culture is norms, values, assumptions. Culture impacts school effectiveness and change efforts. Healthy, positive cultures exist in high achieving schools.

instead encourage technical competence, specialization, and aspiration for expertise. Each of these qualities challenges citizenship and humanism. Objectives like standardized testing, for example, draw attention away from humanistic priorities as well as active knowledge building, collaboration with others, and instilling a lifelong love of learning (Damon, 2008). The lack of purpose young people often feel in today's world can be linked to the lack of purpose they experience in their schooling (Damon, 2008). "Would we not expect our schools and our universities to provide the 'why' of academic and education pursuit—to indicate clearly to students why they are studying what

they are, beyond merely the daily task of mastering the content of the academic subject?" (Damon, 2008, p. 112). Yet, educational leaders admit that there is no purpose currently acknowledged by schools and universities that unites a collective concern about the education of a student (Durden, 2010).

Vision has been addressed as a significant contributor to school effectiveness (Knight, 1998; Senge, 2000; Reigeluth, 2006; Marino, 2007). A shared vision is a set of tools and techniques for bringing people's dissimilar aspirations into alignment around what they have in common: their connection to a school (Senge, 2000).

The significance of culture is gaining attention in the educational field. School cultures are complex webs of traditions and rituals built up over time as teachers, students, parents, and administrators work together and deal with crises and accomplishments (Schein, 1985; Deal & Peterson, 1990). Deal and Peterson (1999) explained that culture fosters school effectiveness, productivity, change, and improvement efforts. Culture builds identification of staff, students, and administrators while amplifying the energy, motivation, and vitality of a school community.

The authors also indicated that culture increases the focus of daily behavior and attention on what is important and valued. This description closely relates to that of identity in an organization but puts a heavier focus on historical events (Deal & Peterson, 1999). van der Westhuizen, Mosoge, Swanepoel, and Coetsee (2005) studied the impact of culture on school achievement. They found that healthy and positive cultures exist in high-achieving schools but not in low-

achieving schools. That is, they suggested that a positive organizational culture is a positive influence on school members and is instrumental in shaping their behavior in achieving goals.

Though identity has not been explored specifically in primary schools, it has received marginal attention at the university level. Considine (2006) attributed the challenges facing universities to identity. He said the current issues have arisen not because universities are short of funds or facing competition, but because they are unable to explain what they do that is distinctive. Ledoux (2005) began to address the role of identity through the lens of online universities. With students learning from a distance and no physical structures, such institutions struggle to create and foster a shared identity. They must ensure they have identifying cultural characteristics for both the recruitment of students and the affiliation of alumni. He also pointed out that corporate models fail to serve the needs of educational institutions in addressing this problem.

Agility in Organizations

Psychological research has acknowledged that, like individuals, organizations are more successful at implementing change if they are ready for it (Armenakis, Harris, & Mossholder, 1993). Holt, Armenakis, Field, and Harris (2007) created a scale to assess change readiness. They found that readiness for change is a multidimensional construct influenced by beliefs among employees that (a) they are capable of implementing a proposed change, (b) the proposed change is appropriate for the organization, (c) the leaders are committed to the proposed change, and (d) the proposed change is beneficial to

organizational members. Several change readiness assessments exist for organizational use, yet they center around a specific initiative and so are inadequate as a basis for agility.

A change capability goes beyond a single change initiative to represent an organization‘s ability to change as needed. It involves knowledge and skills related to change, resources and systems devoted to change, experience with change, and learnings from change (Cummings & Worley, 2008). The capability to change can also be called agility.

Today‘s organizations sit in an environment of complex, continuous change (Brown & Eisenhardt, 1997). Management theories and systems, however, typically encourage organizations to seek alignment, stability, and equilibrium. Only organizations with a capacity for flexibility can grow and remain competitive in today‘s changing world (Volberda, 1999; Lawler & Worley, 2006). Agility is the ability to quickly reconfigure work processes, technical knowledge, and human capital in ways that repeatedly provide new sources of temporary competitive advantage.

A recent survey (McKinsey Global, 2006) found that nine out of 10 executives ranked organizational agility both as critical to business success and as growing in importance over time. Survey respondents listed more satisfied customers and employees, higher revenues, improved operational efficiency, and a faster time to market as benefits of greater agility.

Agility in Schools

Research has not specifically addressed the concept of agility within schools. Change, however, has been acknowledged as a need: “There is a growing insistence not only that change occur but that it be accomplished quickly in institutions that historically have been comfortable only with slower, self-paced, incremental change” (Gioia & Thomas, 1996, p. 371). Concepts such as school reform (Reeves, 2009), turnaround schools (Fullan, 2006), school capacity (Cosner, 2009), systemic improvement (Duffy, 2003), and school learning (Senge, 1990) support the need for educational change, yet fall short of addressing change as a capability within school systems.

Reeves (2009) explored the significance of culture in change management. School reform or centrally mandated policy change accomplish nothing if organizational culture does not change as well. He illustrated imperatives of cultural change and offered a change readiness instrument for schools. The evaluative factors that determine change readiness are history, need for change, willingness to change, faith in leadership, change plan, and skills necessary to implement.

The closest framework to agility within a school system is that of a learning organization (Senge, 1990; Knight, 1998). A learning organization is an organization where people continually expand their capacity to create desired results, where new patterns of thinking are nurtured, and where people are continually learning how to learn together. Learning organizations re-create themselves to respond to changes when necessary, and individuals have the

personal discretion to respond to the changing demands of their specific area of responsibility. Marino (2007) added that shared leadership, clear vision, system alignment, measurement of results, and broad-based participation are critical components of the improvement process.

There are also several support systems in place to foster change in schools. For example, management organizations (Education for Change, Edison Learning, Knowledge Is Power Program, etc.) exist for chartered schools to ensure that the founder of a new school has tools and resources to meet state requirements, gain funding, implement effective curriculum, report metrics, and so forth. There are also several foundations and organizations generating research and tools to move education forward. The New Teacher Project, the George Lucas Educational Foundation, and the Schlechty Center for Leadership in School Reform are a few examples.

Link Between Identity and Agility in Organizations and Schools

The concepts of identity and agility have been linked in organizations (Lawler & Worley, 2006; Sull, 2010). For example, identity rests at the center of Lawler and Worley‘s (2006) built to change model but they do not provide any empirical evidence of the connection. Though organizations should be built to implement strategic changes rapidly, identity is a force that should remain intact. It is this unchanging central point that keeps the organization grounded in its core values and guides its decision making (Albert & Whetten, 1985). Porras (2006) agreed: “Great companies that endure need to be guided by meaningful, unchanging core values while at the same time be architected to change” (quoted in Lawler & Worley, 2006, p. xii).

The link between culture and innovation in chartered schools is referenced by another researcher. Fox (2002) found that the teachers in a charter school believed their culture was supportive of innovative teaching practices; they felt inspired to take risks and try new instructional strategies. They also felt a shared sense of mission, which supported their ability to innovate. Fox was focused on the overall effectiveness of chartered schools and did not explore further the impact of culture on agility.

Marino (2007), Squire and Reigeluth (2000), and Reigeluth (2006) highlighted the significance of identity in change management at the school level, noting that without a clear mission, vision, focus, and direction, people will determine for themselves what is most important. Educational leadership must provide a compass to guide the improvement journey and change stakeholders' mindsets and beliefs about education (Squire & Reigeluth, 2000). Self-reference is the ability to remain consistent with the core ideas, values, or beliefs that give an organization its identity. Reigeluth (2006) said for a school change process to be effective, people must have the freedom to make their own decisions about changes, as long as they are guided by sufficient self-reference. This gives people a sense of stability while they make small changes and prevents the system from reaching a crisis point.

Summary

Existing research supports the significance of organizational identity and agility in sustained effectiveness. In the educational field, less evidence supports this specific link, though topics related to identity have surfaced and urgency

surrounds the need for agility. Existing research has set the stage for further data collection and exploration of how identity can impact agility to better serve society‘s educational needs.

Chapter 3

Research Methodology and Procedures

This chapter describes the methods used in this study. It supports the research question,"Does a clear identity better equip a school to implement change?" by collecting data about a school's agility and identity. This chapter is organized as follows: an explanation of the study's design, the sampling method, the data collection methods and instruments, and data analysis procedures.

Research Design

This descriptive, action research study consists of a survey-based diagnosis as well as a feedback session with school administration to formulate an action plan. Action research brings together doing and inquiring; it uses empirical procedures of action and research to solve practical problems (Punch, 2005). The strengths of action research are that it is practical, collaborative, critical, iterative, and transformative in both theory and practice. The weaknesses are that the researcher becomes a part of the system and can therefore significantly impact the results.

Diagnosing and feeding back data to a client does not constitute a complete action research cycle in that this study will not include implementation of actions and subsequent analysis of their effectiveness. However, these two phases of action research are sufficient to achieve the objectives of this study and provide the school system with useable information about its functioning.

Data Collection Procedures

The head of school at Lafayette Academy Charter School granted approval to conduct research on April 12, 2010 (Appendix A). Pepperdine University's Institutional Review Board granted approval to conduct research on May 7, 2010 (Appendix B). The data were collected and reported in conformance with standard assurances of confidentiality.

Within LACS, the researcher used a nonprobability sampling method to involve the entire school population because of the size of the population and ease of data collection. With the approval of the head of school, the human resources staff gave the researcher access to the names and email addresses of each employee at the school. The researcher used an online surveying method of questions related to identity and agility for data collection. An introductory letter (Appendix C) was passed out at a school- wide faculty meeting to each employee at LACS. The letter explained the purpose of the project and requested participation in the study. The letter directed readers to their email account for a link to the questionnaire (Appendix D), which they would have one week to complete. After one week, 75 participants completed the online survey. This represented a 73% response rate (based on a school population of 103 administrators, staff, and faculty).

If an employee preferred not to use the online system, there were hard copies available which they could complete by hand and return in a confidential envelope. The researcher entered these into the survey database as they were received. After one week, two participants submitted a hard copy of the questionnaire to the researcher.

Instrumentation

The School Agility and Identity Survey (Appendix D) was based on an adaptation of the built to change agility survey developed by Lawler and Worley (2006). The researcher conducted a pilot study to obtain feedback from five educators, including teachers and administrators. The pilot group was given the same level of information as live participants and asked to complete the questionnaire. Several questions were revised as a result of the pilot to clarify the meaning and avoid confusion.

The survey initially requested high-level profile information, including role (faculty, staff, or administration) and tenure with the school. The next 39 questions asked participants to rate statements about the school‘s strategy, structure, resource allocation, information usage, reward system, development, leadership, identity, and agility on a 5-point scale. They could also indicate that they “Do Not Know” for any response. The remaining seven questions asked for more detail about decision rules, leadership responsibilities, orientation, and internal and external brand. The survey utilized a variety of questioning techniques, including open-ended, multiple choice, and rating scales.

Measures

The School Identity and Agility Survey was used to measure identity and agility. Regarding the concept of identity, existing literature describes several components, which served as the basis for the identity questions in the survey. Because identity is a result of both internal and external impressions (van Riel & Balmer, 1997), one question set asked respondents to describe the organization internally and externally. Another question asked how decisions

are made, as identity should drive behavior within an organization (Lawler & Worley, 2006). Identity also explains what makes an organization unique (Albert & Whetten, 1985), so multiple questions asked respondents to rank identifying priorities and choose between competing values.

Organization agility can be broken down into several components, as established by the Built to Change model (Lawler & Worley, 2006). The categories are adopted in the Agility and Identity Scales (Appendix E) which served as the basis for the agility questions in the survey. Each category contained several corresponding statements and asked respondents to rate the school relative to each statement. Agility was measured through the mean and standard deviation of each category.

Data Feedback

A feedback meeting with school leadership served as an additional source of data and an opportunity to validate or invalidate survey results. After the survey was administered, the researcher presented the results to the head of school. First, the researcher presented the basic results, broken down by demographic data, agility data, and identity data. The researcher asked the head of school for his reactions before providing any analysis. The second part of the meeting was in interview format so the researcher could ask the head of school about initial analyses, test hypotheses, and obtain additional explanations. Finally, the meeting included open-ended dialogue to help advance the thinking of both the researcher and the head of school. This meeting also served as an intervention in the system. The researcher intended for the head of school to leave this meeting with a greater awareness about agility and identity and an

interest in improving these areas for greater school effectiveness. Following the feedback meeting, the researcher recorded themes and additional information to be incorporated into the overall findings.

Data Analysis

The survey data were analyzed in a straightforward manner. Close-ended items were summarized with descriptive statistics, including means, standard deviations, and percentages. Using scales developed by Lawler and Worley (2006), appropriate items were added together and divided by the number of items in the scale to create 14 agility scales and one identity scale (Appendix E). Prior testing by Lawler and Worley indicated that all scales achieved Chronbach reliability estimates greater than 0.65. Other quantitative items related to cultural values, identity, and the existence of a shared decision rule were described in charts showing relative percentages.

Open-ended questions related to identity were also analyzed in a straightforward manner. Answers to the questions regarding the school‘s reputation and culture were analyzed separately but used the same method. First, answers were sorted into groups referencing similar themes. For example, in the question, “Is there a widely shared objective or decision rule that is applied in the face of conflicting goals?” the responses “what is in the best interest of the student” and “child-centered approach” were placed into a group tentatively labeled “Student Needs.” Second, once all the answers were either grouped together by theme or considered unique, the groups were examined for overlap and uniqueness. When overlaps were found, the groups were combined and relabeled. Finally, the themes were examined for their relative frequency.

Themes receiving a high frequency were considered candidates for the school‘s identity and were presented for validation in the feedback session.

Agility scores were compared to benchmark data from Built to Change agility surveys. Though no other schools have been measured with this instrument, the data are externally valid relative to other organizations.

To determine whether the school had a clear identity, the researcher looked at the scores in specific questions as well as consistency across question sets. To determine whether identity and agility were related, the researcher compared the school‘s agility scores to its identity scores. If they were positively correlated—the school scored high on both the identity scales and the other agility measures—identity may have been related to a school‘s ability to change. If there was no clear consistency or they were negatively correlated, identity may not have a relationship to a school‘s agility.

Summary

This chapter provided a summary of the research methodology and procedures used to determine if there was a connection between identity and agility in a school system. The study design, instrumentation, data collection, and data analysis were explained. Detailed findings of the study will be presented in Chapter 4.

Chapter 4

Results of the Study

The purpose of this study was to answer the research question: Does a clear identity better equip a school to implement change? This chapter provides the data collection results and findings of the study. The first section presents demographic information about the participants of this study. The second section presents data gathered through the School Agility and Identity Survey. The third section explains how the findings were presented to the leaders within the school of study and their corresponding reactions. The chapter closes with a summary of findings.

Demographics

The survey was distributed to a population of 103 faculty, staff, and administrators at LACS. Seventy-five individuals completed the survey, yielding a 73% response rate.

Role

Of the 75 who completed the survey, 57 (76%) identified their position with the school. Within those respondents, 86% were classified as faculty, 9% were classified as staff, and 5% were classified as administration. This sample distribution accurately reflects the overall distribution of the school.

Tenure

Of the 75 who completed the survey, 70 (93%) indicated their tenure. Within those respondents, 40.0% were within two years of employment with the school, 49% were between two and four years, 6% were between four

and six years, and 6% were beyond their sixth year with the school. Table 2 provides detailed information about the sample. These results suggest that the sample accurately represents the faculty, staff, and administration of the school, and results from the survey can be generalized to the larger school population.

Table 2

Demographics

Role	*N*	% of Total Respondents (*N* = 75)	% of Respondents to Question (*N* = 57)
Faculty	49	65.33%	85.96%
Staff	5	6.67%	8.77%
Admin	3	4.00%	5.26%
Field left blank	18	24.00%	
Tenure	***N***	**% of Total Respondents (*N* = 75)**	**% of Respondents to Question (*N* = 57)**
0-2 years	28	37.33%	40.00%
2-4 years	34	45.33%	48.57%
4-6 years	4	5.33%	5.71%
6+ years	4	5.33%	5.71%
Field left blank	5	6.67%	

Descriptive Statistics

The findings of the School Agility and Identity Survey are reported in the sections below. The data are organized by (a) statistics that relate to agility and (b) statistics that relate to identity.

Agility Statistics

The response number, means, and standard deviation of the 14 agility scales are provided in Table 3 and sorted in descending order according to overall mean. Data show that the school‘s strongest areas of agility are

Resource Allocation, Future Focus, Change-Friendly Identity, Information Transparency, and Shared Purpose. These scores are also high relative to for-profit benchmarks. In the areas of Shared Leadership, Flexible Rewards, Innovation Emphasis, and Structural Surface Area, the responses were lower and more varied, therefore decreasing the overall agility rating of the school.

Table 3 also depicts the mean scores given by teachers ("Faculty") and administrators and other staff members ("Admin"). While the two groups were aligned around Resource Allocation, their scores varied significantly in all other areas. For example, Administration scores were almost a full point higher in the areas of Connected Leadership, Development Orientation, and Robust Strategy compared to faculty responses. This suggests that teachers believed the school demonstrated much less of these characteristics, though school staff and administrators think of these as widely prevalent. Administrators also scored the school higher in almost every category, suggesting either they have greater clarity into these areas than teachers or they have an inflated view of their presence. In that few organizations scored above 4.0 in the Lawler and Worley database, there is some concern that the scores are higher than normal.

Participants estimated the amount of time leadership spends fixing the school, running the school, and planning for the future of the school. The data indicate leadership spends the least amount of time fixing the school (29%), suggesting that people and processes are in place to either prevent or resolve day-to-day problems. The data indicate leadership spends the most time running the school (45%) and spends 34% of the time building the future school. Note: some participants' responses added to higher than 100%.

Table 3

Agility Ratings

Agility Category	*N*	Overall Mean	Standard Deviation	Faculty Mean*	Admin Mean**
Resource Allocation	75	4.35	0.96	4.33	4.30
Future Focus	75	4.32	0.77	4.27	4.63
Change-Friendly Identity	75	4.25	0.90	4.13	4.72
Information Transparency	75	4.23	0.93	4.11	4.63
Shared Purpose	75	4.22	0.81	4.09	4.69
Change Capability	75	4.15	0.98	4.00	4.69
Learning Capability	75	4.06	0.98	3.91	4.38
Connected Leadership	75	3.91	1.15	3.73	4.69
Development Orientation	75	3.91	1.14	3.73	4.69
Robust Strategy	75	3.89	1.09	3.73	4.69
Structural Surface Area	73	3.70	1.30	3.53	4.13
Innovation Emphasis	75	3.67	1.33	3.52	4.19
Flexible Rewards	75	3.63	1.19	3.47	4.13
Shared Leadership	75	3.45	1.36	3.32	3.94

*N=49; **N=8 Faculty = Teachers; Admin = Administrators and Staff Members

Identity Statistics

Identity was measured using three different quantitative question sets and three different qualitative questions.

Quantitative responses. In the first question set, participants were presented with four statements regarding the school‘s purpose and intent and asked to choose the one that drives the school the most. Responses to this question set indicated a clear results-oriented culture (77% of responses), as depicted in Figure 1.

In the second question set, participants considered six pairs of competing values and choose which one in each pair best describes how people at the school think and act. Three values were most distinctive, with more than 57

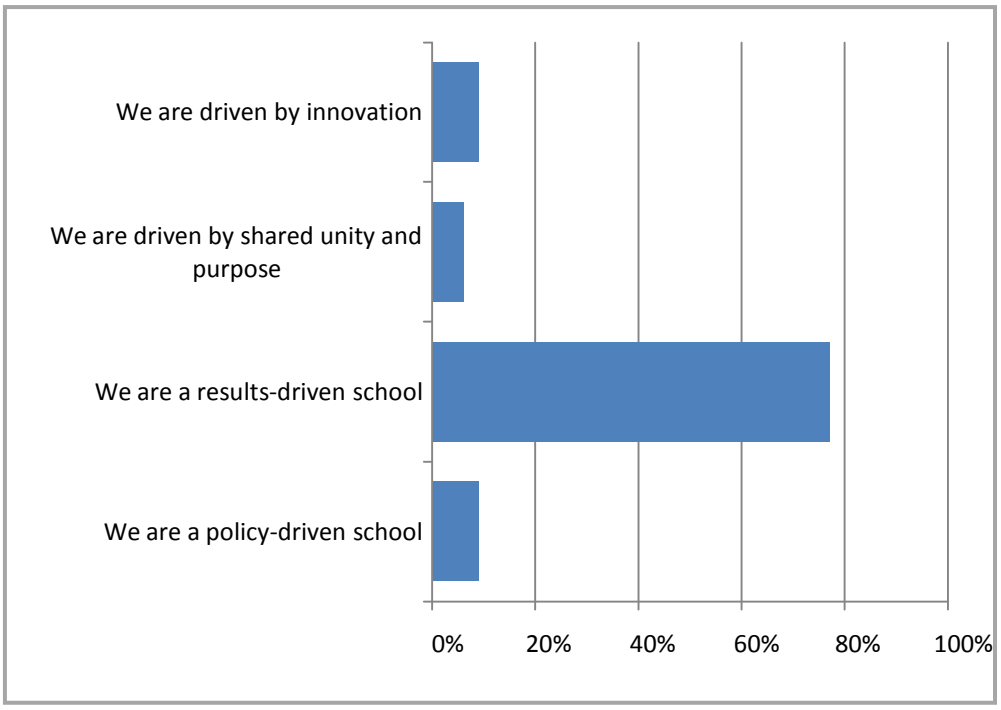


Figure 1

Driving Values

percentage points separating each competing value. The school is Long-Term Focused versus Short-Term Focused, Results-Oriented versus People-Oriented, and Hierarchical or Rule-Bound versus Organic and Free-Flowing. Figure 2 contains more detail and a graphical depiction of these responses.

The competing-value question sets can also be explored by comparing the responses from teachers ("Faculty") to the responses of staff and administration ("Admin") (Figure 3). While the groups are relatively aligned, they differ on their impressions of a few values. For example, the majority of Faculty described the school as Results-Oriented (86%) versus People-Oriented (14%). Administrative impressions, however, were less distinct: 63% described the school as Results-Oriented and 38% described it as People-Oriented. A similar split

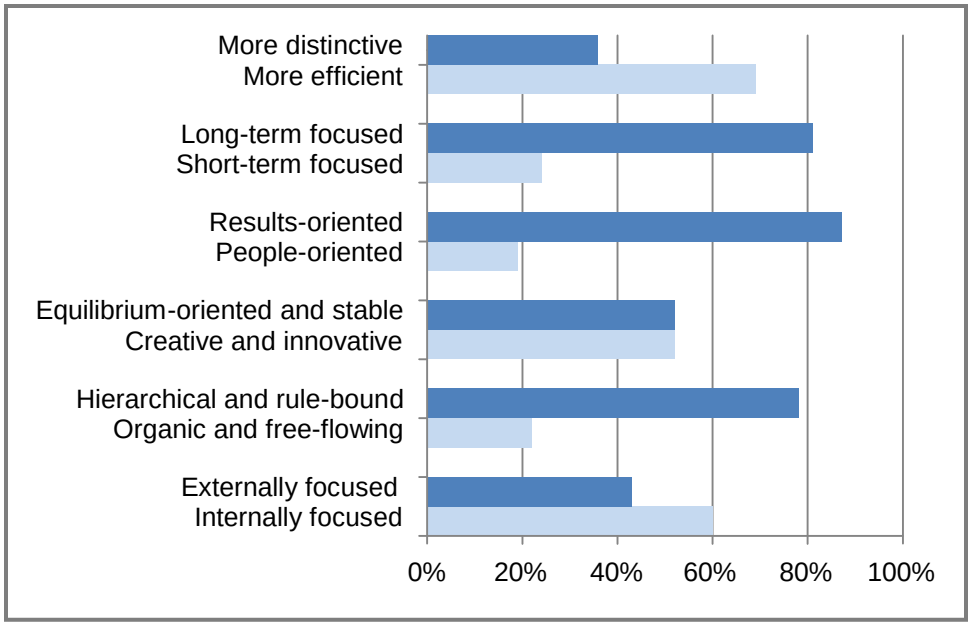


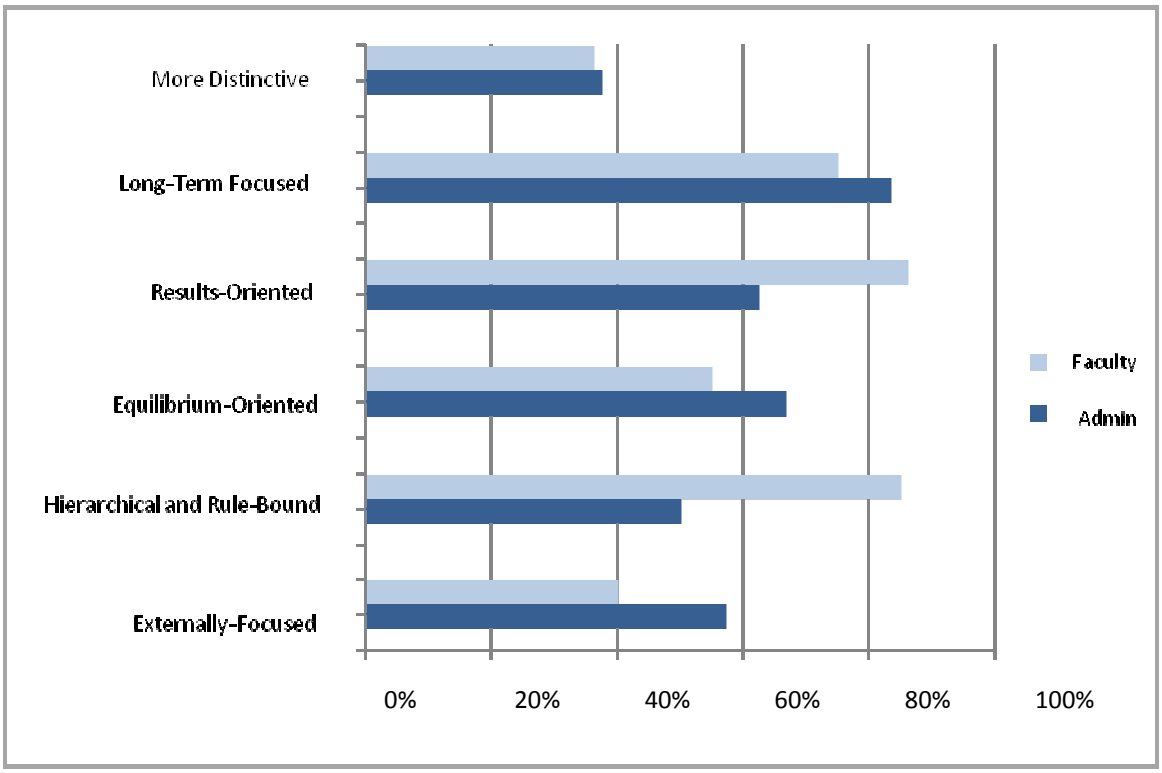
Figure 2

Value Orientations

occurred when respondents were asked whether the school was more Rule-Bound or Free-Flowing: 85% of Faculty indicated the school was more Rule-Bound, whereas Administration was perfectly split between the two values.

The third question set drew from the agility ratings that address identity (see Table 3 on page 29). Most significantly, questions related to a Change-Friendly Identity were among the highest of all categories with a mean of 4.25. This category received the highest average rating among administrators at 4.72.

Respondents demonstrated consistency across question sets, indicating clarity in identity. For example, Future Focus was one of the highest rated categories in Table 3 and is supported by the Long-Term Orientation preference in Figure 3. The low Innovation scores depicted in Table 3 and Figure 1 also support the Rule-Bound and Equilibrium-Oriented preferences in Figure 3. The



Faculty = Teachers; Admin = Administrators and Other Staff

Figure 3

Value Orientations, Broken Down by Role

lower Externally Focused value in Figure 3 corresponds with the relatively low Structural Surface Area in Table 3. The congruence between question sets supports the notion that the school has a strong preference towards rules, internal operations, and long-term functioning.

Qualitative responses. Participants were asked: "Is there a widely shared objective or decision rule that is applied in the face of conflicting goals?" This question helps to address identity because it depicts whether members are aware of an overarching and guiding principle. Of the 71 responses to this question, 35 (49%) answered "Yes," 7 (10%) answered "No," and 29 (41%)

answered “Do not know.” Fifty-one percent of respondents either did not think there was a decision rule or did not know of one, indicating a lack of clarity around identity. Those who answered “Yes” were asked to provide the shared statement that is applied in conflicts. Only 22 of the 35 respondents who said “Yes” provided an answer, and the statements were inconsistent.

The researcher sorted these qualitative responses according to themes, which generally fell into one of two categories: test scores (50%) and student needs (41%). The other 9% did not fit into either category. Though respondents did not indicate one predominant identity-related theme, there was some alignment with the “results-oriented” values indicated in the quantitative results above (Figures 1, 2, and 3). Further detail on these responses can be found in Table 4.

Table 4

Shared Objective Statement

“Is there a decision rule? “

Response	**#**	**%**
Yes	35	49%
No	7	10%
Do Not Know	29	41%

“If yes, what is it?”

Theme	**# of Statements**	**% of Responses**
Test Scores	11	50%
Student Needs	9	41%
Other	2	9%

In a final question related to identity, participants were asked to provide three words commonly used to describe the school both externally and internally,

which the researcher then categorized according to common themes. External descriptors were based on the perspective of people in the larger community (for example, parents, neighbors, district officials). Eleven themes arose as depicted in Table 5. The most frequent descriptors related to facilities, academics, school quality, teacher quality, test scores, and commitment to students. Internal descriptors were based on how faculty, staff, and administration describe the school and its culture to one another. Fourteen themes arose, also depicted in Table 5. The only categories represented by more than 10% of responses were “data-driven” and “reach for excellence.” Other descriptors represented by more than 8% of responses were “student-centered,” “caring/supportive,” and “hard-working.”

The responses to this question support some of the quantitative data discussed in Table 3, Figure 1, and Figure 2 above. In the driving values question, “We are driven by shared unity and purpose” received a low score. This was supported by the variety of responses in the external and internal identity descriptors. Results, data, and academic scores were repeatedly listed as values and descriptors, suggesting this may be the closest explanation of the school‘s identity.

In sum, the data from the survey suggest that the school scored high in many aspects of agility and possesses a results-oriented identity, though this identity should be more clearly articulated by leadership. This suggests that the school‘s agility may be connected to its identity, and further emphasis on identity

Table 5

Identity Descriptors

External Descriptors			Internal Descriptors		
Theme	***N***	**% of Responses**	**Theme**	***N***	**% of Responses**
Safety, Cleanliness, Facilities	16	30%	Data-/Scores-Driven	20	14%
Academics, Curriculum	16	30%	Reach for Excellence, Dedicated	17	12%
Good School	15	28%	Student-Centered	13	9%
Teacher Quality	15	28%	Caring, Supportive	12	9%
Scores	14	26%	Hard-Working	11	8%
Care About Students	12	22%	Goal-Oriented	6	6%
Student Quality	8	15%	Respectful	9	6%
Leadership Quality	7	13%	Creative, Innovative	8	6%
Organized	7	13%	Responsible	7	5%
Improving	6	11%	Unsupported, Underpaid	6	4%
Parental Involvement	6	11%	Efficient	4	3%
Other	18	33%	Positive	4	3%
			Family-/Community-Oriented	3	2%
			Pressured	3	2%
			Other	16	11%

may improve its ability to change. These data were then summarized and brought to the school for feedback, reflection, and interpretation.

Feedback to School Leadership

The head of school was presented with the survey data from LACS. He reviewed the demographic data, the agility data, and the identity data. Following discussion of his initial reactions, he was asked a series of questions related to the results. In response to the agility scores, the administrator was not surprised

that the school received relatively high marks on its ability to change. He explained that LACS was chartered in an attempt to turn around the pre-existing, failing school, Lafayette Elementary. The community was more receptive to change because it was clear that the old way was not working.

The head of school also takes this value into account when making staffing decisions. Teachers are both eliminated and hired based on their willingness to "get on board" in the face of change and ambiguity. He also trains his faculty and staff with change in mind. For example, they regularly learn about new teaching strategies and theories. The school also believes that each child is unique and it is the teacher's responsibility to alter his or her style until the child meets success. The teacher's interaction with the child is a micro example of the responsibility the teacher is expected to take when dealing with challenges.

The head of school was interested in the agility framework, as the concepts were relatively new to him. He agreed that more focus on the categories in which the community scored lower could improve the school's ability to respond to change. For example, he brainstormed a few ideas for sharing leadership activities across more levels of the organization.

Regarding the varied identity data, the head of school was somewhat surprised that there were conflicting opinions. He had a relatively clear view of the school's identity and was hoping his faculty and staff were better aligned. He explained the attempts leadership had made at enhancing and branding the school's culture.

When asked how exactly he would describe the school‘s identity, he offered a statement about the school‘s commitment to educating every child, regardless of need or skill level, and achieving excellent results. Upon further discussion, he realized that the two parts of this statement may be at odds with one another. “Results” ultimately translates to test scores, and every child cannot excel on test scores. He struggled to state which value was more important and admitted a reluctance to choose test scores, even though that was likely the stronger priority. He realized that this reluctance on his part may explain the inconsistent identity results among faculty and staff. Not rectifying these competing values could lead to confusion and inefficiencies among the community and potentially teacher burnout.

The school leader discussed the difficulty in both meeting state standards to secure the charter and supporting other values of education. He wanted his staff to care about both test scores and the best interest of the child, but he admitted that emphasis on one comes at a cost to the other. Since in reality the school cannot neglect either, the research and the head of school discussed the power in simply understanding this tension. As a result of the conversation, he committed to discussing this dynamic among his leadership team and other members of the community. He wants his faculty and staff to be able to manage this tension with more clarity, consistency, and confidence, which it is hoped will result in a stronger and more agile school.

Summary

This chapter presented the findings of the data collected in the School Agility and Identity Survey. The data and feedback from leadership depicted that

the school has many agile features, especially in the areas of Resource Allocation, Future Focus, Change-Friendly Identity, and Shared Purpose. It has room for improvement in other aspects of agility, such as Shared Leadership, Flexible Rewards, and Innovation Emphasis. Identity was evaluated based on quantitative and qualitative questioning. The data suggested that the school is most driven by results. School leadership confirmed this priority but also emphasized the significance of educating every child. The Results-Oriented Identity is also inconsistent with the high Change-Friendly Identity scores noted above. It is unclear at this point whether the school is good at change or just comfortable with it. Chapter 5 will draw conclusions based on the results presented in chapter 4 and discuss implications for further research.

Chapter 5

Summary, Conclusions, and Recommendations

The purpose of this study was to examine the connection between identity and agility in chartered schools. The researcher attempted to address the question: Does a clear identity better equip a school to implement change? This research is significant because schools are facing extreme pressure to change rapidly in today‘s environment yet have failed to do so effectively. They are also being asked to serve many different societal needs but have yet to establish a clear view of what they are and what they are not. The researcher was concerned that being pulled in so many different directions would reduce a school‘s ability to execute any change well.

Existing literature has not yet examined the connection between identity and agility in the school setting, though the significance of this connection for sustained effectiveness in the corporate setting has been supported repeatedly (Lawler & Worley, 2006; Sull, 2010). The researcher explored this link at the individual school level in the hopes of inferring implications at the district, state, and national education levels.

Key Findings

This research question informed the data collected for this study, and prior literature supported the connection between identity and agility in corporations. With respect to agility, the school received relatively high ratings compared to benchmarked organizations in the areas of Resource Allocation, Future Focus, Change-Friendly Identity, and Shared Purpose. The inclusion of

Change-Friendly Identity among the highest scores was encouraging. Many faculty and staff believed that the school's internal and external orientation towards change was high. The school's recent history of change, including its establishment as a charter school following Hurricane Katrina, its recent record of improved test scores, and its implementation of progressive teaching methods, supports the conclusion that it has strong elements of agility and seems to be comfortable with change. However, the relatively low scores on Development Orientation, Innovation, and Flexible Rewards suggest that it is still on a journey to become skilled at change. In particular, the scores for Change and Learning Capability were in the middle of the distribution of agility scale scores. The ability to change cannot be considered a strength of the organization.

When other more specific aspects of identity were explored, however, a more complex picture emerged. Several measures were used to determine whether or not the school had a shared sense of who it is and what it stands for. First, there was a consistent Results-Oriented value in three separate questions. A strong results orientation could support a change-friendly identity because the focus is on outcomes versus maintenance of the status quo. If an organization emphasizes a larger objective, it must modify its current processes and circumstances until it meets success. Second, the majority of respondents indicated either there was not or they did not know if there was a clear decision rule used in the face of conflict. The lack of a decision rule measure conflicts with the results orientation measure and the change-friendly scale score

because if the organization is truly open to change and focused on results, then the impact on results should always drive decisions. The mixed results suggest the school has strong identifying values but has not yet clearly identified what it stands for.

Based on the researcher‘s own experience in chartered schools and anecdotal feedback from other educational leaders, LACS has a much clearer identity than most similarly positioned schools. Few schools have been as consistently focused on test scores as LACS. That said, LACS is still a young organization and the concept of identity in schools is very new; it still has opportunities to improve in this area. The school‘s high propensity towards results as well as its sound agility ratings suggest there may be a positive correlation between agility and identity in a school. The strength of this connection, however, remains unknown.

The data also suggest that the school has conflicting components of identity, which impair its ability to effectively implement change. While LACS scored well on questions related to the existence of a Change-Friendly Identity, the nature of its identity varied throughout the data. Questions about decision rules and competing values suggest that LACS is driven by results and test scores. Qualitative questions about the actual identity of the school, however, surfaced significant variety regarding the identity of the school.

School leaders were initially surprised by this conflict but eventually saw value in the feedback. There may be an espoused, stated values system that conflicts with the actual norms. For example, “Reach for Excellence, Respect

Others, Be Responsible" was mentioned several times as an internal descriptor of the school, signifying it may have been a branded campaign by school administration. Some respondents may have listed this identifier because of the campaign. Others may have listed descriptors that were closer to their personal identity, such as "child-centered," "caring and nurturing," or "innovative." This is also supported by the variance in scores among faculty and administration. The disagreement in strengths may be a result of differing perspectives (people believe the school should focus on varying attributes); transparency (leadership does not articulate the school's focus); or understanding about the school's values and beliefs (leadership articulates the school's focus, but people interpret that focus differently). Some of this tension is healthy in an organization, as diversity of thought helps to create a well-rounded community. However, if the differences are unintentional and/or avoided, people may make their own interpretations and conflict with one another in unproductive ways. The data suggest that better alignment between faculty and staff could enhance the school's identity and might contribute to the overall effectiveness of the school. School leadership at LACS agreed that central messages may conflict with individuals' preferences and impact the school's ability to operate most effectively.

Conclusions and Recommendations

Based on the evidence in this study, the researcher concluded that there may be a connection between identity and agility in schools. The data here are not suggestive of a strong and obvious relationship, but the feedback with the LACS head of school pointed out that many of the disconnects are the result of evolving implementation issues. LACS is a very young organization that still

seems to be finding its place in the educational landscape. Much of its existence has been dedicated to cleaning up the issues of the former organization. It is natural that it has undergone an extreme amount of change, which may explain why it demonstrates a high propensity towards change (high scores in Future Focus and Change-Friendly Identity), but not necessarily a strong change capability (lower scores in Robust Strategy, Structural Surface Area, and Learning Capability). LACS has opportunities to become more strategic and intentional towards change versus effectively reactive to it.

LACS' tenure may also explain why it is still determining what it stands for. Identity is central and enduring (Whetten, 2006), yet LACS has not endured for very long. As a young organization with improving performance, the internal culture is still forming (Tuckman, 1965; Schein, 1988) and its external image and brand is still being tested. Identity is an enduring quality that impacts long-term effectiveness (Ackerman, 2000). Some parts of the school's identity are clear and some are not, but the school is in a perfect place to facilitate the evolution of its identity so it can effectively endure. The head of school should not be disappointed that LACS' identity is not consistently clear, but instead he should focus on the assets and themes that surfaced regarding identity, including its results and long-term orientation. There are clear strengths and strong values in place, so the leadership team can determine how to build on and shape those to best serve the current and future school. With greater awareness about the tensions that exist between some of these themes, the leadership team can begin to prioritize their values instead of continuing to force two opposing values equally.

The awareness that LACS gained as a result of this study may not only improve the school‘s identity and agility, but also better answer the research question presented in this study. The researcher would suggest re-administering the School Agility and Identity Survey in a few years to see how the school‘s results have changed in response to this awareness.

While further data collection is necessary, the researcher also recommends that school leaders at the individual school level focus on clarifying their identity. If the results in a school system correlate with existing research in corporate settings, a clearer identity will enhance the overall effectiveness of the school. LACS‘ implied identity may have contributed to its relative agility, but if its identity was explicit and consistent, the school would be able to operate more effectively. Leaders should be clear about what their school stands for and promote that identity internally and externally so that the school can more effectively set goals, achieve success, and cope with external demands and changes.

Larger city, state, and national education systems should, at the very least, support the individual school‘s efforts to define what they are and what they are not. This is not a concept that education systems yet endorse. They are hesitant to let a school create a distinct identity because it may ostracize members of the community or voters.

For example, in several of the open-ended questions in the LACS survey, respondents did not consistently state that the school is a driven by test scores. Yet, when asked to rank values, test results were a clear priority. The

significance of test scores is controversial in the educational field today, which may explain this reluctance. In addition, schools often receive bad press when they are not meeting the needs of an interest group. Often in the headlines, schools will get condemned for not challenging the gifted students one week and condemned for not better engaging students with learning differences the next week.

Even if a school‘s identity is not universally appreciated, it should still be fostered. Teachers that believe in the identity of a particular school will choose to teach there, and those who do not will go elsewhere. Parents who believe in a school‘s identity will send their children there, and those who do not will send them elsewhere. Financial stakeholders who believe in a school‘s identity will invest in it, and those who do not will send their money elsewhere. Other schools will have different identities that serve other needs and values within the educational market. For example, one school might stand for preparing students for college; another might stand for serving each child‘s unique skills and talents; and another might stand for a community-based approach to education with heavy involvement of families, neighborhood associations, and activities for the greater good. With true distinctions in the market, teachers, parents, and stakeholders can shop around to find the best fit for them.

Right now, each public school is expected to serve all facets of supporting and preparing a child, and these duties extend far beyond a textbook. However, the main objectives schools are given in this pursuit are academic requirements set at the local, state, and national level. This often creates an overemphasis on

academic standards, as depicted in the school of study. The school‘s focus on test scores conflicts with many educators‘ personal motivations, creating tension within the community. Research suggests that standardized test scores are just one component of transforming children into productive members of society, and there is great risk in placing too much weight on this component (Pink, 2006; Goleman, 2005; Robinson, 2009). Therefore, if a school defines itself by academic standards that have been mandated centrally, it will not be serving the needs of the individual child or the future needs of society.

Standardized, external mandates do not take into account the smaller organization‘s culture, values, and identity, which are components of effective change (Reeves, 2009). A school will struggle to be successful if it defines itself by centralized standards because the externally mandated values may not correspond with the organization‘s culture. Direct stakeholders may also resist these values because they were not engaged in their creation. Therefore, this study and the existing research support the idea that individual schools should define their own identity. In order for this to work, however, government agencies must support individual schools in that quest and adjust standards to take the individual objectives of a school into account.

Researchers should further study whether the benefits of identity in an individual school extend to the larger educational system. If each school within a collective system has a clear and differentiated identity, will they serve the holistic needs of education better? Can a school system operate like industries

within a free market and be more likely to innovate and serve customers effectively? If teachers, parents, and stakeholders choose where they want to invest, will the market decide what works and what does not? With no identity, resources are diluted across competing demands, so will true best practices emerge if resources are aligned with the identity of each institution? Though this study took place in an individual school, further research can determine how much of an impact a clear identity can have in improving the larger arena of public education.

Study Limitations

The findings of this study are limited for several reasons. First, agility and identity data do not yet exist for other schools. How this school's agility compares to others is unknown. More research should be done to assess the validity of its results. The school of study happened to be strong on many components of the agility scale relative to corporations, but corporate systems differ greatly from educational ones. Other profiles should be explored to more precisely determine the impact of identity on agility in a school system.

Another limitation is that there were a small number of responses from administrators. Though it was reflective of the school population, the sample size was not large enough to understand how the views of administrators and faculty members differ. The researcher also failed to obtain responses from parents or school board members, despite requests. Additional stakeholder perspectives would have provided further detail into where interests align and how best to

target efforts for improvement. This information should be required in future administration of the School Agility and Identity Survey.

Though this is not a limitation to the findings, future research in this field should be aware of the traditionally resistant culture of an education system (Senge, 2000; Reigeluth, 2006). The school system is one of the most antiquated social systems in place today. A significant percentage of teachers are committed to maintaining the status quo (Muhammad, 2009). Teachers' unions are strong in numbers and power. They contribute more money to political campaigns than any other organization in the country. Many of their objectives are around providing stability and security for teachers. For example, most unions fight to protect the tenure system and oppose performance evaluations. Therefore, any expectations of change should be tempered. A clear identity and agile capability may only go so far in a system as stuck as this one. As Caldwell (2004) pointed out, school transformation defies organizational views of transformation because it has so much difficulty "letting go." Though this resistance is important to note, it should not hinder the pursuit of change within schools. A greater focus on school identity may actually help to break these barriers of change. According to Beckhard (1969), change readiness occurs when individuals have enough dissatisfaction with the current state, attachment to the future vision, and confidence in the next steps to achieve it. With greater clarity about what education is and where it is going, the entire system may be more prone to support the change that is necessary to serve our children and the world.

Summary

This chapter presented an overview of the research and a summary of the findings. Results were based on both existing literature and the research conducted in this study. The researcher also identified limitations of the research and recommendations for future study.

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Appendix A

Head of School Approval

Lafayette Academy Charter School
2727 South Carrollton Ave. • New Orleans, LA. 70118• 504.861.8370 Office• 504. 861.8369 Fax

April 12, 2010

Pepperdine University
Research Board

To Whom It May Concern:

We are happy to cooperate with Amy Scalia on her research project for Pepperdine and allow her to collect data related to Lafayette Academy Charter School.

Sincerely,

Mickey Landry
Head of School

Charles M. Landry
HEAD OF SCHOOL

Appendix B

University Institutional Review Board Approval

PEPPERDINE UNIVERSITY

Graduate & Professional Schools Institutional Review Board

May 7, 2010

Amy Scalia
10136 Walden Dr
River Ridge, LA 70123

Protocol #: O0310M07
Project Title: *Identity and Change in School Systems*

Dear Ms. Scalia

Thank you for submitting your application, *Identity and Change in School Systems,* for exempt review to Pepperdine University's Graduate and Professional Schools Institutional Review Board (GPS IRB). The IRB appreciates the work you and your faculty advisor, Dr. Chris Worley, have done on the proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations (45 CFR 46 - http://www.nihtraining.com/ohsrsite/guidelines/45cfr46.html) that govern the protections of human subjects. Specifically, section 45 CFR 46.101(b)(2) states:

> (b) Unless otherwise required by Department or Agency heads, research activities in which the only involvement of human subjects will be in one or more of the following categories are exempt from this policy:
>
> **Category (2) of 45 CFR 46.101**, research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless: a) Information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and b) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.

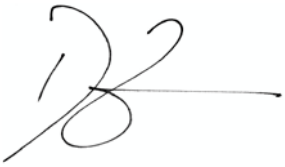
Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit a **Request for Modification Form** to the GPS IRB. Because your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the GPS IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite our best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the GPS IRB as soon as possible. We will ask for a complete explanation of the event and your response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the GPS IRB and the appropriate form to be used to report this information can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* (see link to "policy material" at http://www.pepperdine.edu/irb/graduate/).

Please refer to the protocol number denoted above in all further communication or correspondence related to this approval. Should you have additional questions, please contact me. On behalf of the GPS IRB, I wish you success in this scholarly pursuit.

6100 Center Drive, Los Angeles, California 90045 ▪ 310-568-5600

Sincerely,



Doug Leigh, Ph.D.
Associate Professor of Education
Pepperdine University
Graduate School of Education and Psychology
6100 Center Dr. 5th Floor
Los Angeles, CA 90045
dleigh@pepperdine.edu
(310) 568-2389

cc: Dr. Lee Kats, Associate Provost for Research & Assistant Dean of Research, Seaver College
Dr. Doug Leigh, Chair, Graduate and Professional Schools IRB
Ms. Jean Kang, Manager, Graduate and Professional Schools IRB
Dr. Gary Mangiofico
Dr. Chris Worley

Appendix C

Introductory Letter

Dear Member of Lafayette Academy Charter School:

My name is Amy Scalia. I am a graduate student in Organization Development at Pepperdine University's Graduate School of Business, under the supervision of Dr. Christopher Worley. As a member of the Board of Directors for another New Orleans charter school, I am dedicated to the advancement of quality education in the area, and aware of the significant part you play in this movement.

In fulfillment of my master's thesis, I would like to invite you to participate in a study that will help me identify some qualities that have contributed to the success of Lafayette Academy, including its faculty and administration, structures, processes, and culture. I would to receive your opinions about these qualities via an online questionnaire, which should take about 10 minutes to complete. **Completing the survey is strictly voluntary. When the results of the research are shared with LACS, the information will reflect the school as a whole, not any individual respondents. To further protect your privacy, we are not requiring you to provide your name or any information that could identify you.** While your responses will be anonymous, I will ask you about your role and the amount of time you have been with LACS for holistic data analysis purposes only. **You have the right to refuse to answer any question.**

The questionnaire will be administered via an online survey system. A link to the survey has been sent to you via your Lafayette Academy email address. If you would prefer to complete a hard copy of this survey, please return it to the envelope in the school's office. I would appreciate the survey being completed or returned by next **Tuesday, April 20, 2010**.

A summary of the findings may be obtained in approximately 3-6 months. If you wish to receive a summary of the findings, please send an email with your contact information to amy.scalia@pepperdine.edu. You may request a copy of the findings whether you elect to complete the survey or not.

If you choose to complete this survey, you are indicating that you understand the purpose of this research and the voluntary nature of your participation. If you have any questions about this, please contact me prior to completion of the survey. Questions or comments regarding any aspect of this study can be sent to me via the contact information below. You may also contact my thesis chairperson, Dr. Christopher Worley, at Pepperdine University Graziadio School of Business and Management, 6100 Center Drive, Los Angeles, CA 90045.

I do hope you will decide to participate in this study. Thank you in advance for your time and attention.

Respectfully,

Amy Scalia
Pepperdine University Graziadio School of Business and Management
Candidate for Master of Science in Organization Development
Email: amy.scalia@pepperdine.edu
Phone: 703-201-2825
Fax: 504-738-8146

Appendix D

School Agility and Identity Survey

School Climate Evaluation Survey

Thank you for agreeing to participate in this study. For each of the items below, please select the response that most closely reflects your beliefs about how the organization typically acts. There are no right or wrong answers; we are looking for your honest opinion based on your role and experience.

By proceeding with this survey, you consent to the following:
a.) you understand that the purpose of this survey is to advance research in the field of charter school education.
b.) you understand that your participation is completely voluntary and you have the right to refuse to answer any question.
c.) you understand that your responses are anonymous and will be kept completely confidential by the researcher; only summaries of the data will be presented.

For high level analysis purposes, please provide the following basic demographic information. This information will in no way be used for identification purposes; however, your response to these questions is optional.

Role *(e.g., faculty, staff, administration, board)*:
_____

Tenure with school *(independent of role):* _____

Please rate your school according to the following statements:
"Traditionally this school...

Traditionally, this school…		**Not at all**	**A little**	**To some extent**	**To a moderate extent**	**To a large extent**	**Do not Know**
1.	…develops its school-wide strategic objectives and plans with flexibility in mind	1	2	3	4	5	DNK
2.	…encourages innovation	1	2	3	4	5	DNK
3.	…provides people with an accurate sense of how the school is performing	1	2	3	4	5	DNK
4.	…considers the school's ability to change a strength of the organization	1	2	3	4	5	DNK
5.	…has a purpose or mission that is widely shared	1	2	3	4	5	DNK
6.	…reallocates resources (e.g., time, supplies, money) easily as circumstances require	1	2	3	4	5	DNK
7.	…allocates money to skills and knowledge that contribute to effectiveness (e.g., development, hiring, bonuses, continuing education, etc.)	1	2	3	4	5	DNK
8.	…develops leaders at all levels	1	2	3	4	5	DNK
9.	…is good at applying lessons learned from past experience	1	2	3	4	5	DNK
10.	…has flexible recognition and reward systems for faculty and staff that change to take advantage of opportunities	1	2	3	4	5	DNK
11.	…has a unifying purpose or mission other than growth	1	2	3	4	5	DNK

12.	... has formal processes to connect school leadership with faculty and staff	1	2	3	4	5	DNK
Traditionally, this school…		**Not at all**	**A little**	**To some extent**	**To a moderate extent**	**To a large extent**	**Do not Know**
13.	…supports individuals developing new knowledge and skills	1	2	3	4	5	DNK
14.	…has enough flexibility in the school budget to support new ways of teaching or better ways of working together	1	2	3	4	5	DNK
15.	…has purpose, mission, values, and management systems that act as a coherent whole to drive behavior and performance	1	2	3	4	5	DNK
16.	…encourages everyone to share leadership activities	1	2	3	4	5	DNK
17.	…utilizes strategies that can adapt to changes in the school , community, and educational field	1	2	3	4	5	DNK
18.	…encourages prudent risk-taking among faculty, staff, and students	1	2	3	4	5	DNK
19.	…has a culture that embraces change as normal	1	2	3	4	5	DNK
20.	…rewards seniority more than performance	1	2	3	4	5	DNK
21.	…has a purpose or mission that is acted out on a day-to-day basis	1	2	3	4	5	DNK
22.	…has a strong reputation in the community for its ability to change	1	2	3	4	5	DNK
23.	…has a strong commitment to developing faculty and staff	1	2	3	4	5	DNK
24.	…spends a lot of time thinking about the future	1	2	3	4	5	DNK
25.	…has stated values that guide day-to-day behaviors of faculty, staff, and administration	1	2	3	4	5	DNK
26.	…is able to implement changes better than most schools	1	2	3	4	5	DNK
27.	…has a track record of delivering on the goals of new initiatives	1	2	3	4	5	DNK
28.	…has school leaders spending considerable time interacting with the rest of the organization	1	2	3	4	5	DNK
29.	…has core values that support change in the school	1	2	3	4	5	DNK
30.	…widely shares –best practices information	1	2	3	4	5	DNK
31.	…often effectively shares what is learned in one part of the school with other parts that could benefit	1	2	3	4	5	DNK
32.	…regularly reviews lessons learned from change efforts	1	2	3	4	5	DNK
33.	…is known in the community as an organization that effectively manages change	1	2	3	4	5	DNK
34.	…has an explicit set of values that guide day-to-day decision making	1	2	3	4	5	DNK
35.	…routinely engages in discussions about what might happen in our school system five years from now	1	2	3	4	5	DNK

36.	…has flexible budgets that respond to changes in the local and educational community	1	2	3	4	5	DNK
37.	…allows information to flow freely from the outside to the individuals and groups where it is most valuable	1	2	3	4	5	DNK
38.	…can successfully manage several change initiatives simultaneously	1	2	3	4	5	DNK
39.	…puts faculty, staff, and administration in touch with members of the larger educational community	1	2	3	4	5	DNK

40. Is there a widely shared objective or decision rule that is applied in the face of conflicting goals *(e.g., "how will it impact test scores," "what's right for the student," etc.)?*

□ Yes □ No □ Do Not Know

If Yes, what is it: _____

41. Roughly, what percentage of the time does school leadership spend…

a. Fixing the school _____%

b. Running the school _____%

c. Building the future school _____%

TOTAL 100%

42. Please consider each pair of values below and check the box indicating which orientation best describes how people think and act in the school. We are very interested in knowing about the values that actually *guide* behavior and decision-making.

Is this organization more…

□ Internally focused	or	□ Externally focused
□ Organic and free-flowing	or	□ Hierarchical and rule-bound
□ Creative/innovative	or	□ Equilibrium-oriented and stable
□ People oriented	or	□ Results oriented
□ Short-term focused	or	□ Long-term focused

43. Would you say the school is successful because it is *more efficient* than other schools at teaching students and managing the school or because the school has a *distinct and unique* way of teaching and managing?

□ more efficient or □ more distinctive

44. What are the three most common things people in the educational community *(parents, students, neighbors, other schools, district officials, etc.)* say about our school?

_____

_____

_____

_____

45. What are the three most common words we use to describe ourselves? How do we describe our culture?_____

_____

_____

_____

46. Which of the following statements best describes the school?

a) We are a policy-driven school; we look to policies or processes to address how we operate. If there is not a policy in place, we defer to school leaders to determine how to resolve it.
b) We are a results-driven school; we seek first and foremost to achieve mandated scores and standards. Leaders encourage us to meet goals and be the best. We often look to other schools to determine how to achieve the highest standards.
c) We are driven by unity and shared purpose. We are flexible and support each person in making their own decisions. Leadership facilitates and supports us in an advisory role.
d) We are driven by innovation. We have the flexibility and independence to take risks and adapt to the changing needs of the community. Leaders are visionary.

Do you have any comments, thoughts, or questions you would like the researcher to consider?

If the researcher would like to gain more information related to the overall results of the survey, would you be willing to discuss your experience in more detail for 15 minutes either in-person or over the phone? (Note: your survey responses would in no way be connected to your interview)

□ Yes
□ No

If yes, please either provide your email address and/or phone number below, or send your contact information to the researcher at amy.scalia@pepperdine.edu.

_____

This concludes the survey. Thank you for your participation.

If you have any questions or comments for the researcher, please contact her via email at amy.scalia@pepperdine.edu.

A summary of the findings will be available in 3-6 months. If you would like a summary of the findings, please send your contact information to the researcher at amy.scalia@pepperdine.edu.

Appendix E

Agility and Identity Scales

Agility and Identity Scales

QUESTION #	TRADITIONALLY, YOUR ORGANIZATION …
FUTURE FOCUS	
24.	spends a lot of time thinking about the future
35.	routinely engages in discussions about what might happen in our school system five years from now
41.	Roughly, what percentage of the time does leadership spend fixing/funning/building the school
ROBUST STRATEGY	
1.	develops its school-wide strategic objectives and plans with flexibility in mind
17.	utilizes strategies that can adapt to changes in the school , community, and educational field
STRUCTURAL SURFACE AREA	
39.	puts faculty, staff, and administration in touch with members of the larger educational community
RESOURCE ALLOCATION	
6.	reallocates resources (e.g., time, supplies, money) easily as circumstances require
14.	has enough flexibility in the school budget to support new ways of teaching or better ways of working together
36.	has flexible budgets that respond to changes in the local and educational community
INFORMATION TRANSPARENCY	
3.	provides people an accurate sense of how the organization is performing
37.	allows information to flow freely from the outside to individuals and groups where it is most valuable
DEVELOPMENT ORIENTATION	
13.	supports individuals developing new knowledge and skills
23.	has a strong commitment to developing faculty and staff
FLEXIBLE REWARDS	
7.	allocates money to skills and knowledge that contribute to effectiveness (e.g., development, hiring, bonuses, continuing education, etc.)
10.	has flexible recognition and reward systems for faculty and staff that change to take advantage of opportunities
20.	rewards seniority more than performance
SHARED LEADERSHIP	
8.	develops leaders at all levels
16.	encourages everyone to share leadership activities
CHANGE-FRIENDLY IDENTITY	
19.	has a culture that embraces change as normal
22.	has a strong reputation in the community for its ability to change
29.	has core values that support change in the school
33.	is known in the community as an organization that effectively manages change
INNOVATION EMPHASIS	
2.	encourages innovation
18.	encourages prudent risk-taking among faculty, staff, and students
CHANGE CAPABILITY	
4.	considers the school's ability to change a strength of the organization

QUESTION #	TRADITIONALLY, YOUR ORGANIZATION …
26.	is able to implement changes better than most schools
27.	has a track record of delivering on the goals of new initiatives
38.	can successfully manage several change initiatives simultaneously
LEARNING CAPABILITY	
9.	Is good at applying lessons learned from past experience
30.	Widely shares “best practices” information
31.	Often effectively shares what is learned in one part of the school with other parts that could benefit
32.	Regularly reviews lessons learned from change efforts
CONNECTED LEADERSHIP	
12.	Has formal processes to connect school leadership with faculty and staff
28.	Has school leaders spending considerable time interacting with the rest of the organization
SHARED PURPOSE	
5.	Has a purpose or mission that is widely shared
11.	Has a unifying purpose or mission other than growth
15.	Has purpose, mission, values, and management systems that act as a coherent whole to drive behavior and perfor
21.	Has a purpose or mission that is acted out on a day-to-day basis
25.	Has stated values that guide day-to-day behaviors of faculty, staff, and administration
34.	Has an explicit set of values that guide day-to-day decision making
40.	Is there a widely shared objective or decision rule that is applied in the face of conflicting goals?
IDENTITY	
42.	Please consider each pair of values and indicate which orientation best describes how people think/act in the school
43.	Would you say the school is more successful because it is more efficient or more distinctive?
44.	What are the 3 most common things people in the community say about our school?
45.	What are the 3 most common words we use to describe ourselves?
46.	Which of the following statements best describes the school?