Empowering of School Boards
2019 – 2022

Organisation Development in Estonian schools

FIRST MODULE
09th – 13th of December 2019

TRAINING BOOK

Table of Contents for My Training Book

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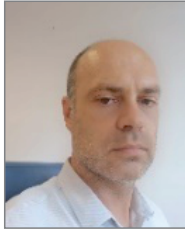**5. Anu Sopanen**
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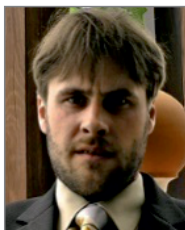+49 171 176 2032; harald.jaeckel@trigon.de

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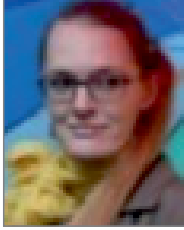+372 5067383; madis.kallas@saaremaavald.ee

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Short summary of Erasmus+ project "Empowering of School Boards"

To take advantage of civil activity and community movement, which is gaining momentum worldwide, we believe that next decade is the very moment for democratic involvement of parents and students into the management of school and education in general.

Parents are the key players in creating the environment for the child's development. In order to participate in developing the school environment, the parent must take responsibility by participating in decision-making processes. Parents as decision makers must be educated and competent. Society needs a national education program for parents and other school board members, the keywords of which are communication skills (development and conflict management) and cooperation (collegial management).

Estonian Parents' Association (EstPA) has been actively and systematically trained school boards since 2006 and practically all Estonian schools have been visited and altogether about 10,000 school community members have been trained. There have been met many school boards who are ready to take on more responsibility, as well as heads of schools and members of the local governments who would be willing to grant more rights to school board if they only knew how to do it correctly in terms of the laws and sustainability.

Studies show that school leaders are often in a very difficult situation where each stakeholder (municipality, teachers, students and parents) demands their own and the principal's preparation for a creative solution is not good enough. Therefore, our first task is to help school leaders to better implement the democratic governance model at school and at the same time prepare parents and the school board to unleash their potential.

In this project are involved five schools from Saaremaa municipality, all together 1955 (60,1%) of all islands students. That means more than thousand families. Working together with principals and the local government, a systemic approach will be developed together with international group of scientists and other professionals.

As an important part of the project, completely new school - Saaremaa State Gymnasium - will be developed based on two upper secondary schools in project. This process has so far been very arduous because neither school community wants to give up its long-standing tradition in local cultural life. The project promoters have undertaken their own mission of helping to create a third, the new culture in peaceful co-operation between the two communities and public at large, bringing as many young people as possible, who have gone to the mainland, to return to their home island later, to create a family.

Thus, the project is not just aimed at giving the school board the right to make more decisions, but to create cooperative assumptions that directly affect the sustainability of local cultural life. One of the most important short-term goals of our project is to train a group of mentors-mediators who have the appropriate personal qualities and sufficient life experience to be prepared to create the prerequisites for a consciously focused peaceful transformation process in different school communities at different stages of development.

However, if we look at the long term, then this project has impact on at least five levels - citizen, family, educational institution, local government and state level:

1. project will give the active parents and students an entirely new potential to be involved in the management of an educational institution and systematically improve their competence;
2. project involves more than thousand families and creates the prerequisites for the rapid growth of their communication skills and ability to cooperate - it will benefit the improvement of relations between different generations;
3. collegial management enables the inclusion of a larger number of competent people in the school life cycle; instead of power struggle, energy will go towards cooperation;
4. school board and principal together as community management team will become a trusted partner for local government;
5. at the national level, we dare to predict that the described process will create the necessary prerequisites for a formation of new generation of politicians who have contributed voluntarily to the community for many years and who understand local and educational life and are therefore able to establish and maintain productive relationships in a community-based way.

To be honest, we believe that this project needs proper practical testing in Estonia and then distribution across Europe and elsewhere. Companies with no single decision makers are recognized with the Leadership Innovation Awards. That's the reason we believe the idea of empowering the school boards to be a very timely and powerful tool for triggering change of management culture at grassroots level. From our point of view this is a peaceful way from learning organization to learning society.

2. What is redundant and must be discarded and why?

GROUP 1
- Mammoth schools (part of elementary school)
- The image of an average student -> every child is special
- Too big classes (need to be under 20 students)
- Involving children with special educational needs – is it a good idea? What about other children?
- The issue of special educational needs has been over-exploited

GROUP 2
- Burnt out teachers
- Bureaucracy, requirements
- Superfluous responsibility on the part of the teacher
- The reach of responsibilities
- Intercultural fights
- Duplication
- Curriculum instability, contradiction, uncertanty
- Grades
- Competition
- Catering financing
- Poor health

2. What is redundant and must be discarded and why?

GROUP 3
- Bureaucracy
- Distrust of school
- Thoughtless activities

GROUP 4
- Bureaucracy in education and school
- 'one size fits all' thinking
- Unsustainable units

1. What is today in the educational life of the island that definitely needs to be kept and protected?

GROUP 1
- Saaremaa has all stages of education (up to college)
- A safe school environment
- Schools and kindergartens close to home

GROUP 2
- The locals at Saaremaa are nice (humorous, tenacious, friendly)
- A safe living environment
- Comprehensive education
- Good teachers and leaders
- Values, labor
- Cooperation
- Small rural schools
- Material opportunities

1. What is today in the educational life of the island that definitely needs to be kept and protected?

GROUP 3
- School and teacher autonomy
- Free tuition
- School food
- Outdoor studies
- Small schools
- Unification schools
- All schools are treated equally
- Estonia's smart and good teacher - Individual is important
- Strong families and homes (healthy family values)
- A cohesive community between family and school
- Developmental interview with parents

GROUP 4
- Country schools, close to home schools: primary and kindergarten
- Saaremaa's good education
- Different specialities
- Secure environment – maintaining its reputation; protective shield
- Learning opportunities throughout life

3. What is one that definitely needs to change and why?

GROUP 1
- Non-formal education for adults should be supported by local government and parent's educators should be competent
- The financing should move with the student throughout the schoolyear
- Create a coherent funding base
- More project learning, more vital subjects, active learning
- Education must become a priority of the level of local government
- Need to attract young teachers to school (motivation packages)
- Pay rise for teachers
- Modern teaching methods
- The municipality should support the visual education of the rural population
- Prevent teachers from getting stuck in the textbook
- Teach facts but we should teach more problem solving and logic
- Professionals' meeting place

3. What is one that definitely needs to change and why?

GROUP 2
- The support for teachers
- Parent's interest
- Grading system
- Catering – healthier and more informed
- Systemic activities -> more mobile, outdoors, more active
- Chopped school day
- Suitable for different needs
- Taking individuals to account
- Creating a single space (for all educational economics)
- Aftergrowth of staff
- Children with special educational needs (0%...50%...100%)
- Labor market <-> lifelong learning (elderly + dropouts)
- The role of the teacher in the classroom

3. What is one that definitely needs to change and why?

GROUP 3
- More science-based approaches
- Help for teachers from institutes
- Greater attention and assistance to special needs
- Teacher training
- Aptitude test for the profession (for teachers)
- Regional schools
- Let the school be
- Science-based creative revision of curriculum

GROUP 4
- Involving everyone
- Competition -> cooperation
- Learning concept

4. What is missing and why it is needed?

GROUP 1
- Private schools, alternate education (Waldorf, Montessori, etc.)
- Mentoring system (eg exchange of principal and teachers)
- Cooperation between the school and parents
- Young teachers
- Male teachers
- Expanding the opportunities of higher education
- Further training and retraining opportunities in Saaremaa
- Systematic training of parents

GROUP 2
- Alternatives, diversity
- Small groups
- A teacher to reach every child
- Preventive system for children not to break
- A complete view of where to go
- Activities
- Rotation of school leaders
- Cooperation between general and vocational education and training
- Resources (people, equipment

4. What is missing and why it is needed?

GROUP 3
- State aid to schools (special needs)
- On-site training / mentoring
- Support professionals
- Parent training / support
- Mandatory involvement of parents
- Parental responsibility
- Teaching environmental awareness
- Financing of school trips for rural schools
- Laboratories
- Proper supplies for practice
- Proper financing
- Young teachers
- trust

GROUP 4
- Parent's awareness of the school's role in student's life (home-raises, school-teaches)
- Boarding schools
- Systematically working with special needs

5. What competence does the island have for changes and what is needed?

GROUP 1
- There are potential mentors for educators
- Motivated parents
- On-the-spot in-service training for educators

GROUP 2
- People
- 30 leaders
- Know-how
- Social competences
- Empathy

GROUP 3
- "Saarlus'' – *we are one in island*
- Willingness to cooperate
- Environment / nature
- Culture
- Competent picture

5. What competence does the island have for changes and what is needed?

- Successive growth
- Real estate – ground
- Schools

GROUP 4
- Need new people with new competence
- Collaboration with teachers

Levels of future expectations of project results in 3 years
What are the possible outcomes from a realistic perspective?

GROUP 1 (EstCons 2)
- The Board of Trustees is a strategical partner to the principal
- People know that they are appreciated, and they can make a difference

GROUP 2 (School Boards)
- The school board is empowered to decide and act
- The school board members are aware of their rights, the content of their work and their responsibilities
- The school board is able to involve other parents
- Board members are trained for their mission
- School boards are networking, communicating, exchanging information and experience
- For the director, the school board is the partner, not the controller
- School board members are a united partner to the municipality in educational matters
- The school is the face of the community
- The volume of project training in the municipal schools has increased
- The establishment of an alternative school

Levels of future expectations of project results in 3 years
What are the possible outcomes from a realistic perspective?

GROUP 3 (School Principals)
- An organized school network
- The school has qualified, empathic, motivated teachers
- Modernizing the school environment in full speed!
- Bureaucracy is efficient and acceptable
- Support Center is working! Specialist positions have been filled
- Massive training of parents has begun
- The community trusts the school

GROUP 4 (EstCons 1)
- I've overcome laziness
- My capacity has increased
- The 'Saarlus' has grown
- I've been a member of this project for three years
- I have participated in 80% of the training days

Levels of future expectations of project results in 3 years
What are the possible outcomes from a realistic perspective?

- GROUP 5 (Local Government)
- Thanks to a good education system, they are coming back
- Population growth
- High-skilled jobs
- Life in rural areas
- Increase in choice of higher education
- A worthy salary
- The reef island
- Competition in the labor market for teachers
- Teachers respect the profession

Levels of future expectations of project results in 3 years
What is the absolute minimum we should definitely achieve?

GROUP 1 (Estcons 2)
- People are prepared to participate in the school boards
- Training model for school board members is prepared

GROUP 2 (School Boards)
- Each educational institution has a school board that meets the legal requirements
- Municipal councils meet at least once a year
- Parents establish a closer connection with the school and understand why this is the case
- Parents receive training on the role of the school board

GROUP 3 (School Principals)
- The school network does not get worse
- 'Noored Kooli' - young well educated and active people go to work as teacher for a couple of years
- There is as much bureaucracy as needed and as little bureaucracy as possible
- Parental training on 'raising a child at home' has begun
- The school trusts the community

Levels of future expectations of project results in 3 years
What are the possible outcomes from a realistic perspective?

GROUP 4 (EstCons 1)
- There is a big picture
- Is not driven by itself but by key players
- There is restored faith, greater will and contact with oneself
- The level of these people will be as high as ours today
- The head of education in the municipality is still Urmas

GROUP 5 (Local Government)
- Reasonable law
- Longterm plan
- Openness - space and spirit
- Cooperation and networking
- Involvement of parents and board of trustees
- Children's room
- Information space
- Trust

Dr. Anita Reinbacher

Management Consultant, Organizational Psychologist, Coach, Certified Supervisor,Trainer and University Lector, Certified School Developer (Ministry of Education). Studied work- and organisational psychology (Master and PhD), post graduate training in organisational development, change management, group dynamics, Solution-focused and Systemic coaching, Gestalt therapy and propaedeutic studies. Anita is working with Trigon since 2015 and partner since 2018. Mother of two daughters and lives with her family in Vienna.

Expertise and Business Activity
• Personel and organisational development
• Executive coaching (dealing with (new) leadership roles, conflicts, strain, work-life balance, managing discussions in a solution-focused and target-oriented way).
• Conflict management
• Leadership- and team-training
• Design and moderation of strategy processes

Recent Clients
Agrana, Austrian Airlines, Chamber of Labour Upper Austria, Ministry of Education, Ministry of Finance, BBRZ Austria, Caritas Austria, Coca Cola HBC Austria, Hilfswerk Wien, Austrian National Bank (OenB), Lebenshilfe Steiermark ,PH Vienna, PH Upper Austria, PH Burgenland, PH Styria (teacher training colleges), Pro Mente Reha, Raiffeisen Informatik, Raiffeisenbank International, SOS Kinderdorf, Sprungbrett, SPAR Austria, Strabag, State Government Upper Austria, Trans Austria Gasleitung, University of Vienna, ZAM Styria.

Anja Köstler was born in Munich/Germany in 1961. She graduated in Social Sciences and Adult Education. Her work experience includes 15 years in management functions in Germany and USA.
Additional qualifications: mediation /conflict management, organizational development, HR-development, communication - intercultural competence, mindfulness and mindful leadership. Since 2001 she is a certified mediator BM® and trainer in mediation BM®. She worked as a self-employed consultant, trainer and mediator since 2009 and joined Trigon Munich as a senior partner in 2017.
She lives close to Munich, is married, two adult children.
Her interests: literature, music, theater, swimming, sports, travelling
E-Mail: anja.koestler@trigon.de

Current focus

- **Conflict Management / Mediation:** individuals / teams / large groups
  specialties: cross-hierarchical conflicts; management and works council; conflict-coaching

- **Change Management / Innovation:** intelligent structures of organizations for the future; concepts of leadership and the role of decision making and communication processes (e.g. agile approach, selfguidance, self-organization)

- **Teambuilding / Teamdevelopment**

- **Professional Training in Conflict Management** for mediators, executive staff, internal counselors; implementation of conflict-management-systems

- **Management Development:**
  - Leadership under conditions of instability and uncertainty
  - Mindful leadership - presence and awareness as core competences for the future
  - Empowerment and control - essential polarities in leadership

Core competence

Anjas main focus is to identify appropriate and coherent solutions for the specific requirements of the client system. Along that way she places emphasis on:
* empowerment of the whole system, using the knowledge of all involved for new tracks
* developement of a clear and common understanding of responsibility and its realization.

Clients (shortlist)

Audi AG, Augustinum München, Bayerisches Staatsministerium für Arbeit und Soziales, Burda, Continentale AG, Deutsches Patent-und Markenamt, Erzbischöfliches Ordinariat, Fraunhofer Institut, ING-DiBa, kbo, Knott AG, Lapp Group, Loheland Stiftung, Mayflower GmbH, Swiss Re, Versicherungskammer Bayern, Universität Witten/Herdecke.

Publications (shortlist):
Köstler: „Mediation", UTB/Ernst-Reinhardt-Verlag, München 2010
Köstler/Bauer-Mehren: „Der Konflikt weiß alles besser", Stuttgart 2012
Köstler: „Das ist Mobbing!", in: Die Wirtschaftsmediation 2/2013
Köstler: „Next Level Leadership", in: Trigon Themen 1/2016;
Köstler: „Vom Personenkonflikt zur Zukunftsgestaltung der Organisation", in: Trigon Themen 3/2017

Harald Jäckel was born in 1952. He studied business administration and worked as an entrepreneur in a medium sized company. With an additional sales qualification he became a sales representative in a well-known IT-company. After post graduate studies in the field of pedagogy and arts he was engaged in founding a Waldorf /Steiner school, in teaching and fulfilling leadership tasks for 7 years. Since 1992 he has been a consultant and trainer for organizational, management, personnel development, coaching and conflict management. He joined Trigon as a partner in 1994 and co-founded Trigon Munich in 2002. Harald is a member of the world-wide consultant network „Association for Social Development". He is married, father of an adult daughter and son and lives in Prien by Chiemsee. His leisure activities include sailing, swimming, biking and philosophizing. Email: harald.jaeckel[at]trigon.de

Fields of experience

Harald sees his core competence in stimulating change processes for persons and organizations and in supporting them during a result-oriented implementation of such processes. He accompanies concrete change processes with integrated qualification programs.

Fields of consulting

- Conceptualizing, supporting and implementing change management processes (diagnosis, future projection, decision-making and realization)
- Especially in large and complex change processes: building project structures, accompanying project teams, focusing on information and learning processes, conceptualizing and implementing large group interventions
- Creating market-oriented future projections (scenarios, visions, mission statements, strategies) along with the management and supporting the implementation
- Conceptualizing and running internal management development programs for employees in all hierarchy levels, optimizing and reorganizing management systems and processes, solving conflicts
- Dealing with resistance to ameliorate corporate and team cultures, clearing functions and roles, bargaining with involved parties
- Diagnosis, counselling and mediation in conflict situations
- Designing internal and external seminars with a focus on organizational-, personnel- and management development and conflict management

Experience in school development

Co-founding a Waldorf Kindergarten in Bingenheim in 1981, Waldorf teacher seminar at the Institute for Waldorf Education, Witten-Annen, co-founding of the Freie Waldorf School Wetterau in Bad Nauheim 1985, 7 years as teacher.
Consulting School institutions since 1992. 30 different school projects.
Development of school facilitators in 3 courses for 3 years each as a Trigon trainer - together with Michael Harslem. His new book 2019: The future shape of the Waldorf/Steiner school. A contribution to the innovation of structures and processes. Info3 Verlag. Frankfurt

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Modul 1

Over all	
1.00	List of participants, carcteristics Anja, Anita, Harald, list literature, documents of Erasmus, ODES Training participants
Base concepts of an organization	
1.01.	H. Jäckel Introduction 7 Elements of an Organization
1.02.	F. Glasl 7 Elements of an Organization
1.03.	F. Glasl 4 Phases of development of organizations - presentation
1.04.	F. Glasl 4 Phases of development of organizations
1.05.	H. Jäckel Integration phase 2.0: the turquoise organization
1.06.	F. Glasl 7 processes of Organization Development – presentation - concept
1.07.	H. Jäckel OD 1

Process of Diagnosos	
1.08.	H. Jäckel Processes of Diagnosis
1.09.	F. Glasl / H. Jäckel Questionaire / Pretest
1.10.	F. Glasl Global organization diagnosis
1.11.	H. Jäckel Trigon school questionaire
1.12.	H. Jäckel Questionaire / Pretest
1.12.	H. Jäckel Delta diagnosis

Learning materials		
1.13.	H. Jäckel Portfolio materials	
1.14.	H. Jäckel Learning diary	
School quality		
1.15.	E. Radnitzky About learning	
1.16.	H. Altrichter, C. Helm, A. Kanape-Willingshofer Education and scholl quality	

Organisation Development in Estonian schools

Training for school board trainers

with

Anja Köstler

Anita Reinbacher

Harald Jäckel

Trigon
Entwicklungsberatung

Goals of the project

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1st level goals

- to improve political culture
- to support a development environment for the future of the community
- to give the holistic, spiritual mindset an appropriate position in society
- to be prepared to solve very serious social problems
- to build up the Threefolding Movement in Society

- to give education a new meaning and content
- to be prepared to cope with a constantly changing life
- to focus learning as lifelong development process
- to prepare a new generation of sustainable thinkers and cognitive practitioners
- to change today's dominant political culture
- to create the prerequisites for change

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2ⁿᵈ level goals

- to create a holistic sustainable folk education program
- to implement change with the focus on leadership and development
- to learn organizational development, mentoring techniques, conflict management, collegial management
- to improve people's communication and collaboration capabilities
- to implement methods to come to consensus in the school organization
- to require a shift of paradigm in preparation appropriate trainers
- to change the habit of school boards (from a purely formal body) through the ever-increasing aspirations of parents to achieve greater decision-making power
- to involve new, entrepreneurial and active parents
- to give the school board much greater decision-making power (selection of the principal, development plan, budgeting, etc.)
- to support the development of active parents and their children's development environment
- to improve the school board as a body that creates and learns to use the desired social model at grassroots level

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The program

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Learning goals for the participants

- They have practiced to illustrate the complexity of organizational change in a structured manner and to develop the next sensible measures
- They have learned about and tested the contents, methods and instruments of effective organizational development
- They have reviewed your access to holistic intuitive methods and can further professionalize them as needed
- They have developed approaches that reflect, address and actively shape psychosocial dynamics in change processes
- They have explored their own role in the organizational context and consciously developed the patterns of their perception, thinking, feeling, willing and acting
- They have worked with the tools of OD, Leadership, Conflict Management on specific issues of their organization

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Overview over the moduls

modul 1
Elementary social skills
Base concepts
Education and school quality
Contacing & contracting

modul 3
Process of psycho-social change
Process of change management
Leadership
Collegial management
Structures and processes
Budgeting & Controlling

modul 2
Process of diagnosis
Mindfulness
Process of future design
Process of learning
Process of information
Process of implementation

modul 4
Conflict resolution
Dynamic of conflicts
9 stages of escalation
Interventions
Possibilities of Mediation
Exercises

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Modul 1 h	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 – 10:00		Inner calmness Questions and answeres Systemic OD approach	Inner calmness What is development?	Inner calmness Impuls 7 processes	Case study Question of government
Coffee	Coming 9:30 h Start 10:00 h				
10:30 – 12:30	Overview, goals, expectations, rules Introduce yourself	Input 7 Elements Questions Group work	Input 4 Phases Exercise	Impuls Education and school quality	
Lunch					
14:30 – 16:00	Portfolio method Design elements Feedback exercises	Exercise movement Presentation	Impuls Reinventing Organisations Group work	Group work Presentation	Feedback End
Coffee					
16:30 – 18:00	Build groups Contract	7 elements in dialog school survey	Impuls Philosphies of change	Contacting and contracting	
Dinner					
19:30 – 21:30		Film		Questions	

Modul 2 h	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 – 10:00		Inner calmness	Inner calmness	Inner calmness	Case study
Coffee	Coming 9:30 h Start 10:00 h	Mindfulness			
10:30 – 12:30	Impuls Diagnosis	Future Design Vision, strategy		Information	
Lunch					
14:30 – 16:00	Systemic diagnosis	Scharmer Presencing	Mentoring	Implementation	Feedback End
Coffee					
16:30 – 18:00	U-procedure		Learning	Decision-Making: Process and Result	
Dinner					
19:30 – 21:30		Film			

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Modul 3 h	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 – 10:00		Inner calmness Leadership	Inner calmness Processes	Inner calmness Psycho-social	Case study
Coffee	Coming 9:30 h Start 10:00 h				
10:30 – 12:30	4 Qualities of change	Development-oriented situational Leadership			
Lunch					
14:30 – 16:00	Change management	Collegial management in schools	Structures		Feedback End
Coffee					
16:30 – 18:00				Budgeting Controlling	
Dinner					
19:30 – 21:30					

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Modul 4 h	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 – 10:00		Inner Calmness Focused and open awareness	Inner Calmness Focused and open awareness	Inner Calmness Focused and open awareness	Inner Calmness Focused and open awareness
Coffee	Coming 9:30 h Start 10:00 h				
10:30 – 12:30	Dynamics of conflict:		Self-Expression in conflict-situations		Evaluation of the program
Lunch					
14:30 – 16:00		9 stages of conflict escalation	Leading conflict conversations		Feedback End
Coffee					
16:30 – 18:00	Understanding others in conflict				
Dinner					
19:30 – 21:30					

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Organization development for Estonian schools
Training for school board trainers

Introduction of the **7 Elements of an Organization**

1.01

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3 Subsystems in an organization

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The Soul of Man

Thinking

Feeling

Willing

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Three subsystems of an organization
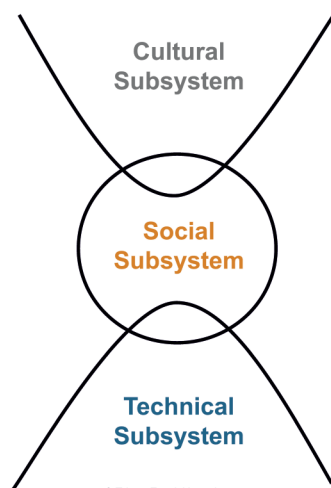
Cultural
Subsystem

**Social
Subsystem**

**Technical
Subsystem**

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**From Learning Organisation
to Learning Society**

CULTURE

Teachers
Council

Freedom

COLLEGIAL
MANAGEMENT

School
Board

Fraternity   *Equality*

Managing
Board

General
Assembly

ECONOMY

POLITICS
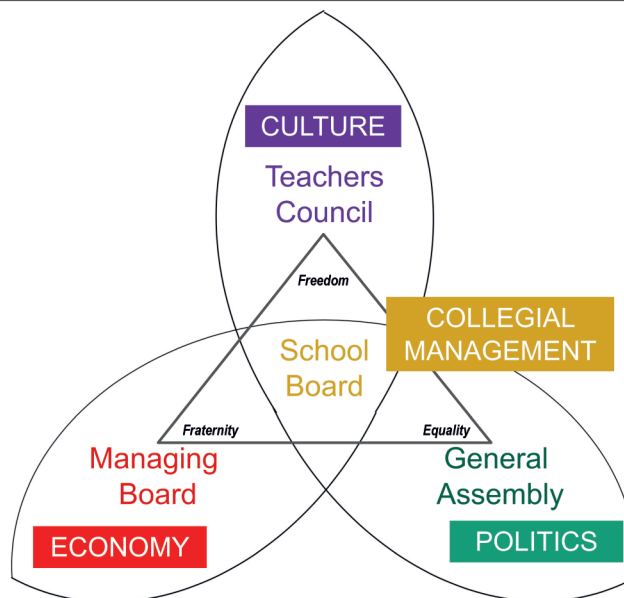
By Aivar Haller

Three Dimensions
with different penetrating Qualities

CULTURE

POLITICS

ECONOMY
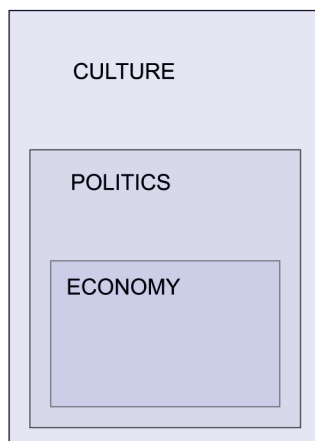
- Freedom
  Tolerance
  Competition
  Spirituality
  Truth

- Equality
  Dignity
  Justice
  Social Competence

- Fraternity
  Satisfying the Needs
  Customer focus
  Liability

Visions
Ideas
Innovation
Intuition

Legal Framework
Social Behaviour

Service Delivery
Economy
Expertise
Quality

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An Integrated System
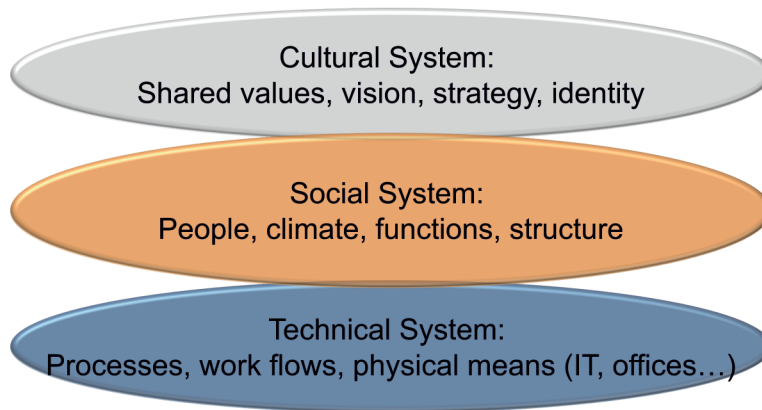
Cultural System:
Shared values, vision, strategy, identity

Social System:
People, climate, functions, structure

Technical System:
Processes, work flows, physical means (IT, offices…)

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The capability of development of an organization is determined by its ability to dialogue

- the quality of its dialogue with regard to the values, policies, strategies

- the quality of its dialogue with regard to the structures, relationships, the people

- the quality of its dialogue with regard to its economic processes and resources

- and
  the quality of the integration of these 3 dialogues

Cultural System

Social system

Technical-instrumental system

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The phenomenon of specific blindness in a closed system:

- A system can only see what it can see.

- It can't see what it can't see.

- It can't see either,
- that it can't see,
- what it can't see.

- (Luhmann, N.: Ecological Communication, 1986, p.52)

Like the black spot in your field of your eyes

So do what???

Open systems!!!

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In the social system it shows itself first ...

In solidified structures

- discuss and argue
- monolog
- delimit, define
- perfectionism
- indirect Messages
- emphasis on dependency
  "We can't, can we?"
- linear-causal thinking
- obsession with detail
- vappreciative mentality
- solution pressure: We 'must' as dictation
- flight into actionism
- systematics and logic
- control thinking

In dynamic structures

- work out and discover
- dialogue
- open, understand
- open development processes
- plain text and openness
- emphasis on autonomy
  "We can... within certain limits."
- viewing the phenomena
- complexity reduction
- tolerance
- detection of currently unsolvable
- leaving open questions unanswered
- situational action
- trust processes

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7 Elements of an Organization (Friedrich Glasl)
3 Subsystems in a systemic net

Culturel subsystem

Identity

Policy, Strategy

Over all Structure

People Teams Climate

Social subsystem

Physical ressources

Individual functions

Technical subsystem

Work processes
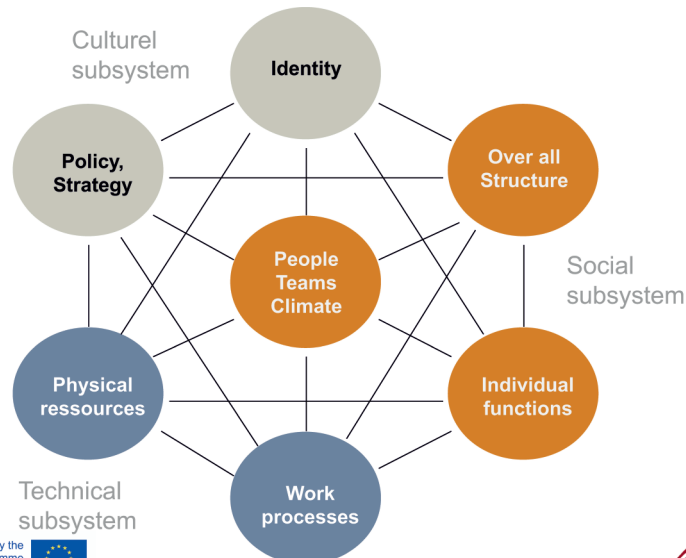
© Trigon Entwicklungsberatung

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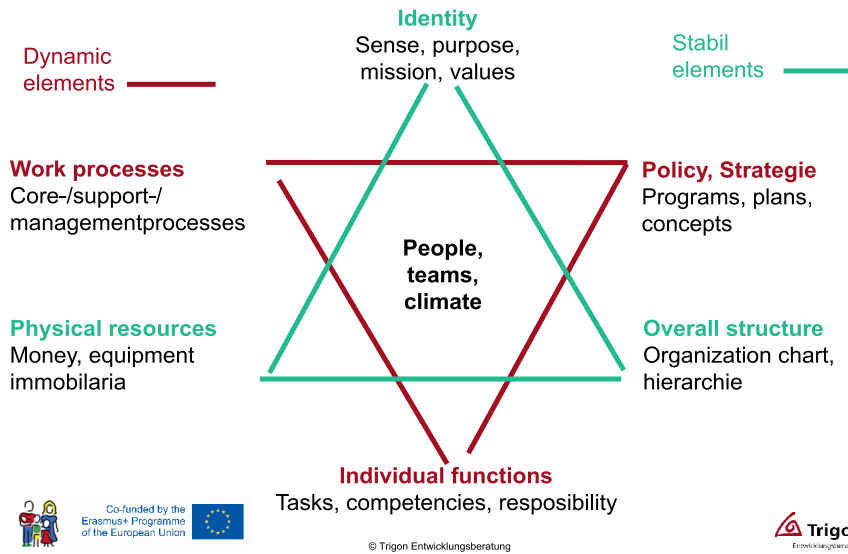|	Internal side	External side
Identity		
	Purpose, aimes, image, core values	Position in market/society, image
Strategies, policy, concepts, programs		
	R&D-strategy, HR-policy, plans etc.	Market strategy, relations to sppl./custom.
Overall structure		
	Hierarchy, central/decentral units etc.	Strateg.alliance, part of interest-org.
People (individuals, groups. leadership, climate)		
	Knowledge,ambitions, lead.-style,relations	External relations, industrial relations etc.
Functions, indiv. jobs, organs		
	Tasks/discretionary power/responsibility	Law, collective bargaining
Processes, work flow		
	Core-processes, supp,proc., mgt.proc.	Logistics, makro-stream of value-creation
Physical means, material means, hardware		
	Building, tech.,instruments,money	Nature,environment,raw-mat.

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7 Elements of an organization in tension

Identity
Sense, purpose, mission, values

Dynamic elements ———

Stabil elements ———

Work processes
Core-/support-/managementprocesses

Policy, Strategie
Programs, plans, concepts

People, teams, climate

Physical resources
Money, equipment immobilaria

Overall structure
Organization chart, hierarchie

Individual functions
Tasks, competencies, resposibility

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7 elements of the organization - Identity

- What was our reason of being - beyond making money?
- What's our way of dealing with customers?
- What is our image to customers?
- Are the declared values the same as the real lived values?
- Have values changed in the last years?

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7 elements of the organization – Policy, strategy

- How clear are the school's/the department's strategies?
- Do strategies reflect school values?
- Is the policy and strategy inspiring, motivating?
- Are there hidden strategies?

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7 elements of the organization – Overall structure

- How understandable is the structure for teachers and parents?
- Does structure support strategy?
- Does structure meet the tension between integration and freedom?
- What are underlying assumptions of organizing the structure?

7 elements of the organization – People, groups

- Do qualifications of teachers, employees and coworking parents meet actual and future requirements?
- What ambitions do teachers, employees and coworking parents have?
- What is their motivation for work?
- Which informal groups and relations exist?
- Do conflicts occur?
- How is power being used?

7 elements of the organization – Individual functions

- How is work designated to functions?
- Which tasks, authorities, responsibilities are assigned?
- What's about planning and controlling?

7 elements of the organization – work process

- How is primary process organized (daily lessons)?
- Are support processes supportive?
- How are management processes done?
- Are the procedures rigid or flexible?

7 elements of the organization – physical means

- Is the equipment appropriate?
- Does size and situation of rooms support daily school lessons, communication and work flow?

Look at a real change case

1. Choose a case, in which you have been involved
   (in an active or passive role?)

2. On which elements did this have impact? How have the effects been?

3. Were these effects planned before?

4. Did one think of the interrelation/interdependency of these elements?

5. Report the most important findings of this group-work

Organization development for Estonian schools
Training for school board trainers

7 Elements of the Organization

1.02

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Friedrich Glasl

7 Elements of the Organization

An organization is a very complex inter-play of many elements including machinery, procedures, jobs, people, values and ideas. We are faced with that complexity if we want to change one element in particular perhaps by introducing quality circles (QCs). Before deciding we have to consider how QCs are hindered or supported by other elements of the organization which we do not intend to change directly. Such elements might include production technology, structure, methods of planning and control and attitudes of workers and supervisors. Can QCs be successful in a tough hierarchical management structure? May we expect quality improvement if the analysis of failure shows that the speed of operations is unrealistically high, while the production technology does not allow any alteration in the work speed?

Thus, if we want to install quality circles, we must first undertake a comprehensive diagnosis of many elements and their relationships. For example: What is the attitude of management and workers to quality issues? What is the interface of a production line with materials supply, with maintenance, production, planning, transport, etc.? All these elements together influence the quality of work.

In order to address the complex reality of life we use a holistic model of organizations. This method consists of seven elements, which are interrelated in many ways and which form subsystems. The elements are listed in the box below.

1. identity

2. policy and strategies, concepts and programs

3. overall structure

4. people (individuals, groups, relations, leadership, climate)

5. individual functions, jobs, tasks

6. work processes, work flow

7. physical means (buildings, money, machinery, instruments)

Let us discuss these elements and their relationships. The treatment in this module is necessarily brief. For more information see von Bertalanffy, 1971; Emery in Davis and Taylor, 1990, Krone in Adams, 1974; Miller and Rice, 1967, Trist in Bennis et al., 1961.

1. The Identity of an Organization

If we diagnose an organization we have to look at this "reason for existence". Questions are:

– Is the basic function which the organization fulfils in society really clear?

– Has the main „reason for existence" changed in recent years?

– Do contradictions exist between major goals?

– Are the major goals known to employees?

– Do employees believe in them? Do the goals make sense to them?

– Which customer needs are considered as relevant?
  Which needs are not seen?
  Why not?

– How does the environment see the organization (image)?

– How does the company present its history or „biography"?

– What is the relationship with cultural, political, economic groups?

What is defined as the existential goal of the organization and how this is defined is a matter of identity. Each organization follows a certain way of thinking, which past experience has shown to be correct and successful. The search for new markets and new products is determined by those patterns of thinking as well.

In many companies the real goals are unknown, sometimes even secret. Often there were convincing and clear goals in the past but they have become vague or completely irrelevant. In many cases the main goals are mere „legends" or meaning fewer conventions.

And yet, all matters of productivity are rooted in the basic goals of the organization. There can be no improvement if the goals do not appeal to the people. Lack of identity causes confusion or detachment.

N.B. The term „corporate identity", as used for public relations purposes, means only image building through corporate design. It should not be confused with the usage here.

2. Policy and Strategies, Concepts and Programs

The major goals mentioned above need to be translated and adapted to the employees in their various functions and to different time spans; long-term concepts, strategic plans, short-term plans and action programs.

With regard to policy making and planning we should ask the following questions:

– Are there gaps between general goals and concrete activity plans?

– Do policies exist for all areas (market, product, R&D, finance, personnel, investment, technology)?

– Do people know and believe in these policies?

– Are there contradictions, gaps or discrepancies between various programs?

– How rigid or flexible is program implementation?

– Are the principles of policy inspiring and motivating?

In all organizations unwritten principles and guidelines exist beside explicitly expressed policies and strategies. They represent a kind of „customary law" of the enterprise; and very often the unexpressed principles and strategies are stronger than those on paper because they correspond to attitudes, i.e. convictions and beliefs. It is obvious that a conflict between unwritten principles and proclaimed policies causes distress and confusion resulting in inefficiencies. For more information on this topic see Ansoff, 1979 and Mintzberg, 1978.

3. The Overall Structure

All individual functions, committees and organizational units are held together by the overall structure of the organization. The structural concept of an organization determines how much centralization or decentralization is necessary. It provides guidelines for the number of hierarchical levels and criteria for the configuration of functions in departments. A good diagnosis is led by the following questions:

– What is the basic concept underlying the formation and configuration of organizational units?

– Do employees still consider this basic concept to be relevant and helpful?

– Do changes in the environment require a new conceptual foundation?

– What is the basis of hierarchical levels? Is it still valid?

– Is the organization generally static or dynamic?

– How does the organization handle matters of differentiation (division of labor), coordination and integration?

– Is the basic concept of the entire organization based on mechanistic thinking, organic thinking or on fighting and power games. Is that appropriate?

– Are the organizational units transparent? Can staff identify with them?

We can only mention a few questions here, but they will reveal some basic strong and weak points of the structure. For more information see Minthberg, 1979; Blau and Schönherr, 1971; Child and Mansfield, 1972; Etzioni, 1961, Lawrence and Lorsch, 1969.

4. People (individuals, groups, relations, leadership, climate)

All organizations live and act through people either as individuals or in groups. For a diagnosis one must ask mainly:

– What is the standard of knowledge and skills?
  Do people want to develop themselves further or not?

– What ambitions do the employees have?
  Is the workforce flexible and mobile?
  What is the motivation for work?
  Do employees feel that good performance is rewarded by the company?

– Are there good relations between teams and departments?
  Are they helpful and supportive to each other?

– Do conflicts occur?

– How important are status, prestige and power?

– Is there a great variety of leadership styles?
  Which style is predominant?
  How is that appreciated?

– How do the employees in general feel about the organization?

– How can the climate be described?

Although tensions and conflicts occur between individuals and groups, their roots may lie in a lack of identity, contradictions between policies or problems in the working processes. The symptoms are evident in people and between them, but very often the causes are to be found elsewhere. For more information see Argyris, 1964; Brown, 1969; Dunnette, 1976; Tannenbaum, 1969; Wexley and Yukl, 1975.

5. Individual Functions (jobs, tasks)

Individual functions in an organization have the same importance as single cells have in a living organism. So the philosophy that underlies job design is significant for the philosophy of the whole organization. A diagnosis must raise the following questions:

– What are the guiding principles dividing tasks between individuals?

– To what extent are planning and controlling separated from or integrated in a job?

– What is the balance between tasks, i.e. required activities and the scope of influence (to get information, to give recommendations, to make decisions)?

– Is the responsibility equal to the authority given to that function?

– Do the jobs form a meaningful entity which appeals to thinking, feeling and willing or are many tasks meaningless?

- Do people have a short or a long work cycle?
- Do workers/managers really accept their tasks and responsibilities?
- Are jobs challenging, repetitive, routine, boring?

The concept of Taylorism insisted on the maximum differentiation of specialist tasks. A worker had to be trained more and more for less and less complex activities. On the other hand the philosophy of job enlargement and job enrichment emphasises self-planning and self-controlling for people on the shop floor to increase job satisfaction. For more information on this topic see Davis and Taylor, 1972.

6. Work Process, Work Flow

The output of organizations depends on the work process, in which ideas are worked out, decisions are made, or raw materials are transformed into new products. Work processes bring about a „transformation"of either material or immaterial inputs. Whenever we have to cut costs or improve the effectiveness and efficiency of an organization, we have to make a very critical investigation of the work processes. The following questions are relevant here:

- Is there a good flow or work or are there bottlenecks, areas of slowing down or speeding up?
- Are the work phases „just in time"?
- Does the process include bypassing, looping, detours?
- Are all the steps of the work process oriented towards the objectives of the work or are there activities which make no direct contribution to achieving the objectives?
- How is the process planned and managed?
  Who is responsible for coordinating the steps in the process?
- Are the procedures rigid or flexible?
  How much standardisation or improvisation is possible – necessary?
- The division of labour establishes dependencies: how do workers assess their interdependency?

Work processes are directly related to job content and employee attitudes. Therefore problems in work flow are immediately mirrored in relationships between people. Again the symptoms become visible in interpersonal relations, but the causes may be found in work processes and their problems. For more information on this topic see Holstein and Berry, 1970; Mintzberg, 1979.

7. Physical Means (building, money, machinery, instruments)

Industrial organizations depend much more on investment in machinery than service organizations, which have to invest permanently in human capital (knowledge, attitudes and skills).

For a diagnosis of problems caused by the physical infrastructure one must look at the following points:

− Is the machinery a real help – or does it sometimes cause difficulties?
− Is the equipment appropriate in ergonomic terms?
− Are there machines which may cause accidents?
− What is the relation between workers and machines?
− Should human labour be replaced by mechanization or automation?

The sections above have emphasized that the elements of an organization are interrelated in many ways. If we prepare some limited organizational changes, we must be aware of the visible and invisible side-effects on the other elements (see Hunt, 1970).

Thus one can understand that a holistic view is important for diagnosing and developing an organization. Without such a view we may search for problems in the wrong place and risk curing symptoms rather than causes. Several elements can be seen as clusters, which form subsystems as shown in figure 8.

1. Identity
2. Policies
   Cultural subsystem

3. Structure
4. People
5. Functions
   Social subsystem

6. Work processes
7. Physical means
   Technical subsystem
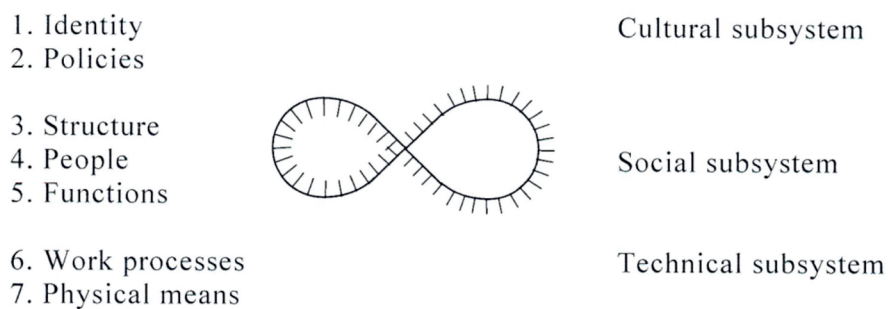
Figure 8: The seven elements in three subsystems

The so-called „corporate culture" (Deal and Kennedy, 1982) is the totality of ideas, values, norms, aims, beliefs and thinking patterns which are put into practice in everyday life and work. Therefore organizational culture is reflected in the way that technology is handled by managers or staff specialists, how money is used, how people are treated and how they respond. The invisible but powerful „soft" basis of the organization is its culture. Experience shows that we face organizational culture whenever we try to change some „hard elements"

of an enterprise. If we introduce new technology which requires different guiding principles, the organization will react against it because of culture. In numerous companies which have computer programs for many activities the old system of manual operations is continued, because the old pattern of thinking and doing is too strong.

A proper diagnosis means determining where the real roots of the problem lie. The symptoms occur in the social subsystem – but they may be caused by discrepancies between the cultural subsystem and the technical subsystem. And for „therapy" we may compare organizational change with curing a headache. The pain is in the head, but perhaps treatment must start with the feet (better shoes, massage) or with the digestion (different eating habits) or with general lifestyle. All that is true for organizations as well.

Organization development for Estonian schools
Training for school board trainers

The 4 phases of development of organizations

1.3

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The 4 Phases of Development of Organizations

4. Association Phase
Cross-linking the organization with its environments
To overcome Power blocs

3. Integration Phase
Developing an integrated organism
To overcome: Environmental challenges

2. Differentiation Phase
Setting up a controllable, manageable apparatus
To overcome: Human relations

1. Pionier Phase
Stimulating an informal organization
around individuals
To overcome: Transparency of the system

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The 4 Phases of Development of Organizations
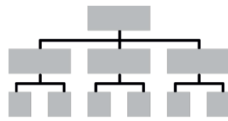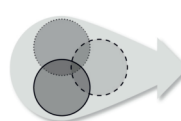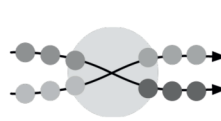
1. Pioneering-phase	2. Differentiation-phase	3. Integration-phase	4. Association-phase
Organization as a big family	*Organization as a rational apparatus*	*Organization as a living organism*	*Organization as a member of biotope*
Can it be planned, managed, controlled?	Is it alife, a whole thing?	Is it all corporate egotism?	Is it a power-block?

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Pioneeringphase

Metaphor: The organization as a big family
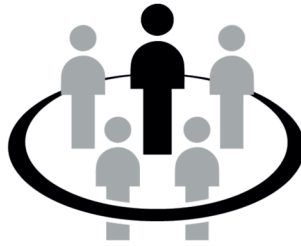
"We give everything to the customer (client/patient/student)!"
Absolute loyality for customers, personal knowledge of customer-situation.
Personality of pioneers is shaping everything: goals, policy, structure, style…

Charismatic and autocratic leadership; warm, emotional; no formal hierarchy.
Allround jobs according personal profiles of employees; personality-centered.

Improvisation – flexibility;
Technical and material means are "not important at all".

Pioneeringphase

Metaphor: The organization as a big family

Personalised   Relations to suppliers, customers:
informal, personal, like with friends, "Members of a Club"
Spontaneous, not formaly organised.

Loose networks

Differentiationphase

Metaphor: The organization as a rational construction/apparatus
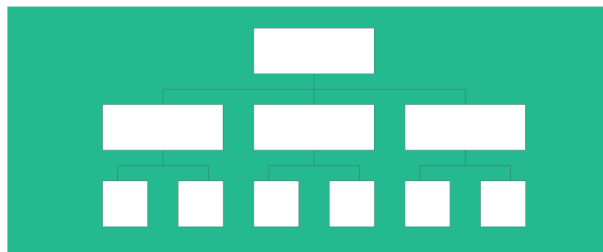
"We sell only products/services which are good for us!"
Systematical approaches, order, mechanisms, logical system, controlled.

Formalised structures, rules, standard procedures;
Structure of functional units (similar activities); staf-line-system;
Hierarchy: constitutional mgt., organising mgt., directing management;
Rational orientation, cares for distance, cold climate.

Employees adapt/adjust to technical requirements;
Division of labour: Separate all planning, all operations, all controls

Differentiationphase

Metaphor: The organization as rational construction/apparatus
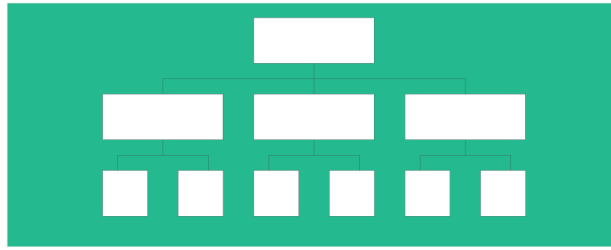
Rational, systematic — Systematic, mainly by questionairs.
Image-checks
Distant – even distrusting
or hostile (customer as prey, to be conquered).
Interiour world is shielded from outer world.
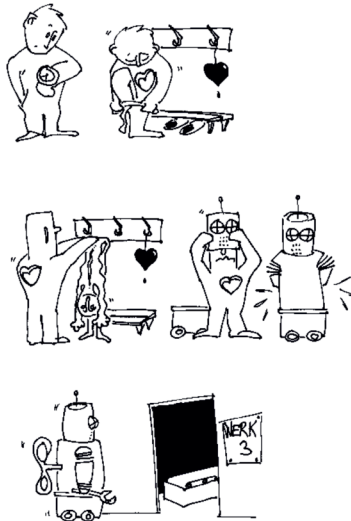
The shadowside of the differentiationphase

The shadowside of the differentiationphase
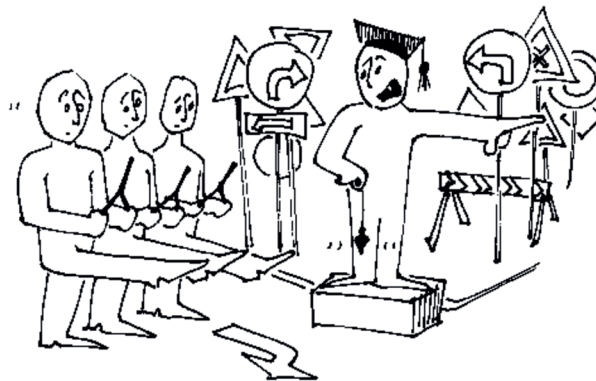
"Obey strictly to art.12, 17, 24 (3, lit c), 35 (2,5,6) of our standard procedures – but feel free and be creative!"

Integrationphase

Metaphor: The organization as a living organism

"We solve the problems of our customers! We create customer benefit/value!"
Visions, goals, strategies, policy = developed cooperatively.

Core-process, support-process, Mgt.process aiming at customer benefit, CIP.
Network of (semi-) autonomous units = "intrapreneuring".
Contingency leadership, integrated jobs, team-work.

Job-enrichment, (semi-) autonomous groups =
Self-planning, self-organising, self-controlling within given framework;
"soft technology"

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Integrationphase

Metaphor: The organization as a living organism
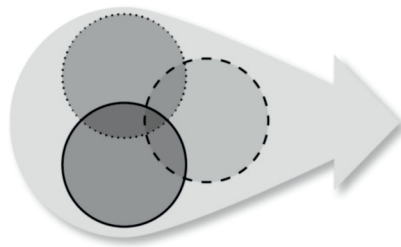
Integration of cultural, social and technical subsystems
through consequent orientation on customer benefit and value-stream-process.

Customer-orientation and output-orientation in the first place:
Regular contacts and feedbacks from customers; customer-conferences.

Care for good supplier-relationships only if useful for customer-orientation

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Customer-orientation

Orientation of all on external customer benefit

Management-Processes

External Suppliers · internal Supplier · **Internal customer** · internal Supplier · **Internal customer** · **External Customer**

Core-Process

Support-Processes

internal Supplier · **Internal customer**

Delivery-system

Internal Service-Providers

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Associationphase

Metaphor: The organization as member of a biotope

upstreams

downstreams

Biotope: "shared destiny relationships", organised relation with the environment, process-responsibility/-management of the macro valuestream:
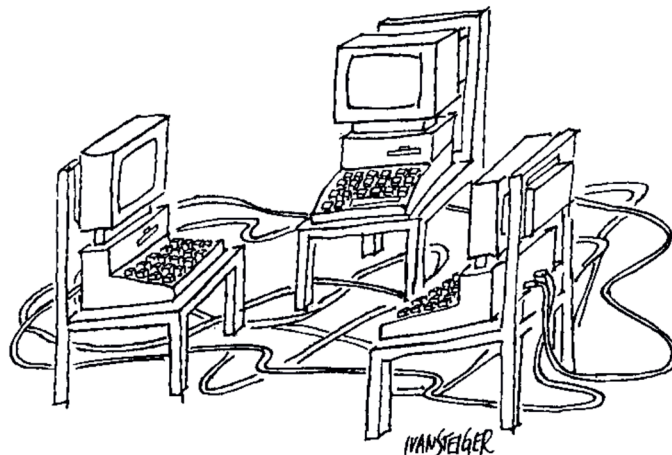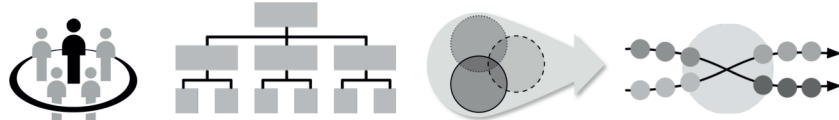upstreams and downstreams – with the partner-organizations

Relations with external partners, associative-cooperative forms:
structured = permanent joint functions/committees,
Shared market research and development of strategy and logistics;
shared research and development (products, processes), trouble shooting;
open books = transparent cost-calculation, profit-sharing 1/3, 1/3, 1/3.

Associationphase

Metaphor: The organization as member of a biotope

upstreams

downstreams

process-responsibility/-management of the macro valuestream:
upstreams and downstreams – with the partner-organizations

1.Customer value added
6.Value added for mutual partners
2.Supplier value added
5.Society value added
3.Shareholder value added
4.Corporate value added
know-how, marketposition...

Networking

IVANSTEIGER

The 4 Phases of Development of Organizations

| 1. Pioneering-phase | 2. Differentiation-phase | 3. Integration-phase | 4. Association-phase |

Organization as a big family *Organization as a rational apparatus* *Organization as a living organism* *Organization as a member of biotope*

Can it be planned, managed, controlled?

Is it alife, a whole thing?
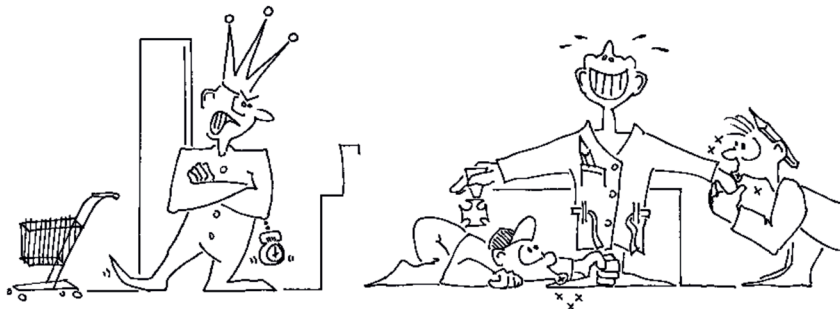
Is it all corporate egotism?

Is it a power-block?

Shadowside of the differentiationphase

The customer is king, but…

… the boss is a god!

---

1. Pioneerphase	2. Differentionphase	3. Integrationphase	4. Associationphase
The enterprise as large family or tribe	The enterprise as mechanism	The enterprise as living organisation	The enterprise as distinctive part of the biotope or network
Personification to the point of personality cult, heroes, gods, sagas, legends	Material symbols, means of incorporation in the foreground, rituals	Consciously thought out and developed culture, symbolic actions, immaterial	Conscious cultivation of culture, cultural dialogue in the enterprise biotope

Source

Glasl / B. Lievegoed:
Dynamische Unternehmensentwicklung.
Bern / Stuttgart / Wien 2011 (4th edition)

F. Glasl:
The enterprise of the future. Stroud 1997

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4 Phases of Developing an Organisation
1.04

The Four Phases of the Developing Organisations

Friedrich Glasl (1997): The Enterprises of the Future. How Companies develop. Hawthorn
     Press

*The four phases of the developing organisation will here be summarised. In order to
understand the enterprise of the future, we need to picture its overall development so that we
can recognise what has been created when a particular enterprise, school or hospital is
founded.*

Figure 1: The metaphors of the four developmental phases (Glasl, Lievegoed [1993]: p. 124)

1. Pioneer phase	2. Differentiated phase	3. Integrated phase	4. Associative phase
The enterprise as large family or tribe	The enterprise as mechanism	The enterprise as living organisation	The enterprise as distinctive part of the biotope or network
Personification to the point of personality cult, heroes, gods, sagas, legends	Material symbols, means of incorporation in the foreground, rituals	Consciously thought out and developed culture, symbolic actions, immaterial, material and personal symbols	Conscious cultivation of culture, cultural dialogue in the enterprise biotope

For the first pioneer phase I like to use the metaphor, 'The enterprise as brotherhood or family'. Look at what happens in families. It does not matter whether the mother or father is the dominant parent; look at the relationships, the way in which family life grows around individuals, the peculiarities, gifts and weakness of the individual family members. It is a structure with quite specific roles, ways of working and dealing with one another, which grows out of the individuals. Something similar happens in the very first phase in the evolution of an organisation, which we have described as the pioneer phase.

The second phase, the 'differentiation phase' begins when the external or internal demands begin to change, so that a crisis occurs in the organisation. This raises the question: Is it possible to continue in this informal style, or do we need a different approach for managing the organisation? As a rule, something new occurs at this point. At first this happens without having been thought about and the organisation turns into a quite different entity. A rational approach and cool calculation become important. The enterprise is thought of and constructed as an apparatus, a mechanism: labour is divided as in a set of cogs in which nothing is left to chance. The way people are managed and work together, how customers, patients or students are treated, is organised exactly. The unspoken guiding principle behind this is the idea

that the whole should function like a well-oiled machine, a mechanism. That is typical for the second phase, the 'differentiated phase'. Every last little part has its task, its role and everything should mesh, should function smoothly without any friction. Even the language which is often used in this second phase indicates that clearly. It is the sober language of engineers, not of biologists or family members.

The differentiated phase, too, encounters certain limits, because the enterprise threatens to drift apart. If an enterprise wants both, to maintain its position in society and face up to future tasks, then it has to decide whether it wants to revert to the pioneering culture, expand it further and perfect it, or whether it has the courage and the ability to dare to take the next step into another type of thinking.

New paradigms, new concepts and guiding principles are required for the development of the 'integrated phase', the third developmental stage. Here, a kind of thinking which sees the organisation as a living organism needs to take over. It is a welcome development that in current management theory a break is finally being made with the narrow 'scientific' thinking which predominated in the 1960's and 1970's. This was characterised by mechanistic thinking in which a variety of statements was made about human beings or the social organism which used computers as their model. If you want to understand human thinking, it was often said, you really have to understand how a computer works. It is greatly to be welcomed that today modern management and organisation theory sates: If we really want to make progress, we cannot draw conclusions about human beings or the social organism on the basis of an analogy with technology; on the contrary, we have to learn from the biological sciences.

With the step into the integrated phase, the breakthrough into other functional levels can only succeed if we break with mechanistic thinking. We need to allow ourselves to be guided by organic, living thinking in the way we develop management and organisational structures, relations with customers, school children, and patients. We need to understand that besides the technical processes there are many other realities which cannot be seen through engineering goggles. This means that I am missing the point if I try to understand all of reality simply by reaching out for the so-called 'facts'. If we want to do people full justice we have to realise that soul realities play a role as well as the hard facts. For what people mean, the images they have of reality, the awareness which they aim to develop – all these things create social realities in an organisation.

The development of the third phase, the 'integrated phase', requires thinking in various sub-systems:

Figure 2: The seven characteristics and the three sub-systems (Glasl/Lievegoed [1993], p. 13.)

Characteristic:	Sub-system:
1. Identity	Cultural sub-system
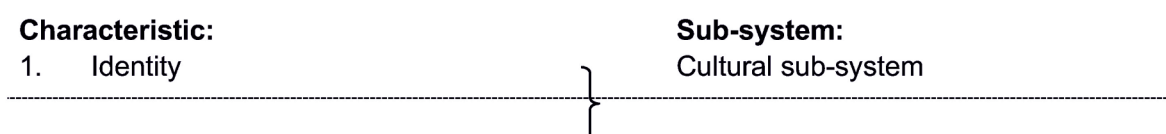
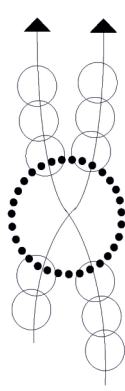| 2.	Policy, strategy, programme		
3.	Structure (organisational structure)		
4.	People, groups, climate, management	}	Social sub-system
5.	Individual functions, organs		
6.	Processes	}	Technical and instrumental sub-system
7.	Physical resources and means		

We have to learn to handle the demands of technology in the technical and instrumental sub-system. We have to understand to handle the demands of the social system, the laws and developments which govern life in that sphere. And every enterprise has its cultural sub-system: its values and guiding ideas, its ways and patterns of thinking, its written and unwritten principles. All of these things are engaged in a trialogue. I cannot organise the whole enterprise on the basis of its technical principles. To do so, would be to cause the social element to degenerate and become deformed. That would result in sickness and all kinds of other things. But neither can I develop and manage it purely from a social point of view or a purely spiritual or cultural one. After all, in the final account the organisation is actively engaged in this world which is formed through the interaction of spirit, soul and matter.

This is followed by a further stage of development, the fourth, 'associative' phase, which provokes widespread discussion. This is because another developmental threshold in the shaping of organisations needs to be crossed today. It is not only important to structure and manage one's own organisation well, but also much more is at stake! We have to recognise that our own organisation can only be successful if it sees itself as an element in a biotope, a whole inter-dependent network of relationships between different organisations and stakeholders.

This does not mean that 'my' organisation becomes subordinate and disappears, but that it is important how this entity relates to others in an ongoing network of cooperative relationships. So we do not buy something here or deliver something there on a one off basis, but we cultivate relationships with buyers, suppliers, consumers, the community, relationships which are more than the opportunistic exploitation of an opportunity. These are a 'shared destiny relationships' because an enterprise has to enter into a relationship with a variety of organisations in its environment; a relationship which is characterised by an attitude of responsibility, of a certain permanence, and which is based on continuous development. As the manager of an enterprise I cannot say: 'I'm all right Jack, even if my suppliers are going to the wall!' The formula for success could be defined in the following terms: I and my suppliers and distributors will do well if each one of us thinks not only of their own advantage, but as a matter of principle of our joint co-operative benefit. That sounds like idealistic dreaming far removed

from reality. But the breakthroughs in modern organisations reveal precisely such developments leading to associative working.

I have described the evolution of the four phases in broad outline. I will now fill in some of the detail of what has so far been presented in schematic form.
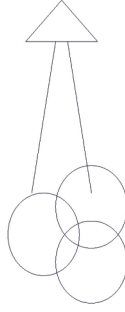
1. Pioneer Phase

'Everything for our customers'

Customer loyalty, personal knowledge of the customer's situation

Personality of pioneer shapes structure, ways of working

Charismatic and authoritarian leadership

Functions organised around abilities of people

Improvisation – flexibility

Means 'irrelevant to result'

Dangers:

Chaos, arbitrariness, lack of independence among staff

2. Differentiated phase

We sell what's good for us!'

System, order, logic, control, feasibility

Formalised structures, regulations, standard rules

Functional structure, staffing structure

Differentiated management levels: planning, organising, directing

Management, business-like, rational

Staff adapt to the given circumstances

Division of labour! Separation: of planning implementation - control

Dangers:

Over-organisation, over-formalisation, fragmentation, rigidification, bureaucracy

3. Integrated phase

'We solve customer's problems! We create customer benefit!'

Vision, targets, strategies, developing basic principles co-operatively

Interlinked, smaller, relatively independent units, entrepreneurial spirit

Situational and developmental management

Integrated functions, teams, autonomous groups

Self-planning, self-organisation, self-control

Dangers:

Tendency towards independence, insistence on autonomy, debates about aims and strategies for their own sake
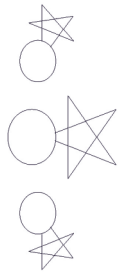
4. Associative phase

In biotope of enterprises: Shared destiny relationships

Relationships to other organisations, stakeholders and environments

Long-term policies, trust and cooperation

Structural incorporation of external bodies, many associative forms

Situational and developmental management, capacity for conflict

Integrational functions, interface management, autonomous teams, self-managing

Responsibility for, and management of processes far beyond limits of enterprise: suppliers, customers through to waste management

Dangers:

Power blocks through strategic alliances, state within the state

Organization development for Estonian schools
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Integration phase 2.0: The turquoise organization

1.05

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**Requirements for
Leadership and corporate culture**

- Confidence, joy of experimentation
- Courage to make mistakes and breaks
- To foster innovation
- Creating a creative working environment
- Creation and design of open spaces
- Project-like, fluid structures
- A wide variety of forms of cooperation
- Relationship management with different players, loosely connected and/or closely connected
- Developing individuality and indispensability: higher quality products, more innovative services, more creative services
- Organization as an organic entity, which can change dynamically according to the task and market situation

- Focus on accuracy and efficiency
- Man as a resource (human ressources?)
- Monetary incentives
- Working in departments
- Separation of responsibility for strategic and executive work
- Feigned infallibility
- Formalized rule communication

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Approach from
Frederic Laloux

Reinventing Organizations
2014/2015

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objective

- To enable a radically different way of cooperation in organization
- Creating organizations with a warm atmosphere
- Creating conditions in which meetings take place that are supported by a positive atmosphere and
- ...where we speak from our hearts and not from our ego.
- To develop an organization that goes hand in hand with the next higher stage of human development
- Leading organizations from a higher level of consciousness

Proposed structure of evolutionary organizations

- CEOs create the space for employees to act effectively.
  They shape the culture by building trust and
  targeted intervention in conflict situations.
  They also represent the organisation externally.
- There is no middle management

Alternative:
- Parallel Teams
- A network of individual agreements
- Nested Teams

Accompanying:
- *Diverse forms/spaces of individual work and learning*
- *Cooperative exchange and learning*
- *Creative designs and settings to exchange ideas and news*
- *Wide variety of cooperation in smaller and larger groups*

Doctrines in evolutionary organizations

- The transition to evolutionary structures, practices and cultures
  releases enormous energy

- This energy is used and
  can be used productively with more clarity and wisdom

- ... through the experienced sense, the distribution of power, through learning,
  through better use of talents, through mastery of the egos,
  through diversity instead of conformity, through lively meetings

- related overcoming borders, breaking down barriers

3 openings/levers

- **Self-management**
  Power is multiplied when everyone gets power and not just a few people at the top.

- **Wholeness**
  The power is used with more wisdom because people bring in more of themselves into the work.

- **Evolutionary sense**
  Everything finds its right place when people connect their power and wisdom with the life force of the organization.

Evolutionary organizations are becoming more permeable both internally and externally.

Principles of change

Self-management
- Fluid leadership systems, situational leadership, reduction of middle management
- Confidence in the natural power of organic, network-like structures
- In decision making: Involving those affected, letting experts have their part, leaving responsibility at the place of action

Wholeness
- To see behind every employee the developing human being with his potentials
- Allow and integrate different and contradictory points of view as far as possible
- The truth has many facets

Evolutionary sense
- Where there is an honest purpose in terms of customer benefit, there is no competition. Every player is an ally
- An organization draws strength from its constantly renewed and adapted vision.
- When an organization deals with the "why", it will be given their destiny.

Self-management

- Organizations are organic entities in the sense of the (holocratic) theory of Laloux.

- Analogous to how the cells in the human body organize themselves and "know" what function they have to fulfil,
  employees have an immanent knowledge of which tasks they have to perform in the context of their role/function in accordance with the purpose of the organisation.

- The leadership provides advice and support when decisions are due. All affected employees must be informed and involved in the decision-making process. The responsible employee makes and is responsible for the decision.

wholeness

- The aim is to create a community within the organisation from the different teams.
- For this purpose, new employees are also selected in the affected unit.
- The advantages and disadvantages of each function are honestly discussed.
- Great importance is attached to the training period
- Every employee should be able to gain a broad overview and anchor herself responsibly in the system.

Evolutionary sense

- Orientation towards customer benefit and the common good
- High-quality innovative products and services with sustainability

- "The organization is seen as an **energy field**, an emergent potential, a way of life that transcends its interest groups and follows its own evolutionary purpose. In this paradigm, we do not "lead" the organization, not even when we are the founder or owner. Instead, we are the **companions of** the organization: we are the instrument that listens to the deep creative potential of the organization and helps it realize its mission in the world."

  F. Laloux. Reinventing organizations. Munich 2015. p. 223

Human developmental stages and
Historical development of organizational forms

- People develop their consciousness further. Levels of consciousness can be recognized and defined

- In order to be able to solve the currently pressing questions of their world, people in every stage of development develop new concepts/paradigms.

- The respective higher development stages include the preceding ones

- Laloux has adopted and adapted the colour concept from Spiral Dynamics. It is based on a typology of five levels of development that is open at the top

colour	expression	examples	focus	image
RED	Permanent presence of power of leadership Fear holds the organization together Reactive, short-term orientation Thrives in a chaotic environment	Startups (???) mafia street gangs terrorist groups	authority Command and Obedience division of labour	wolf
BERNSTEIN	Hierarchical, strictly structured organizations Top down guidance with strict control Defined processes The future is the continuation of the past	Catholic. church Public law organizations state schools	Formal rolls Stable hierarchy Fixed processes	soldier
ORANGE	The aim is to be the winner in the competition Leadership through target agreement and control of results; freedom in execution (How?)	multinationals shareholder focus	Result u performance orientation innovation	vanquisher
GREEN	Value culture, empowerment, employee motivation, focus on core processes	NGOs Value-oriented Company and stakeholder focus	future values participation projects	Community
TURQUOISE	Great freedom to do what is necessary Overcoming complexity at the point of action Cooperation instead of competition	networks Individual very innovative organizations	sense self- management wholeness	cosmos

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Action approaches

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Possible approach in a transformation process

1. Establishing a platform for information and exchange
2. Identify/define question corridors
3. Developing a common focus
4. Work out the meaning
5. Clarify attitude(s) and develop working form(s)
6. Develop and integrate hypotheses;
   to have at the same time also complete openness and freedom
7. Coordinate first possible experiments/prototypes
8. Define and open up experimental spaces and research fields
9. Collect knowledge from the experiments
10. Becoming visible with the findings
11. Ongoing review and further development
12. Step-by-step implementation/project management

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The most important arguments to set up an R I O project

Asking people for deeper sence	Attractiveness as an employer	Self-responsibility higher	Fast new reaction on the market	a
From ego to eco approach	Discovering and using new potentials	Stronger commitment	Increase in productivity medium-term	a
Real eye level	Intensify the development process	Increase flexibility	less friction losses	a
needs of the employee	Consistent focus on projects	Securing the future	Simplified business processes	a
More satisfaction and loyalty	want + can instead of should + must	More innovation	a	

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Training for school board trainers

The 7 Processes of Organization Development

1.06

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If I want to change something I need to ...

1. know my starting position / what situation I come from

2. have an idea of where I want to go and an inner drive towards it

3. approach the new together with other people

4. make sure that new knowledge and skills will be trained

5. inform those concerned at the right time in the right place

6. implement the new and act accordingly

7. take responsibility for the change process

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Organizational Development / Change
7 Basis Processes   (Qualities not chronology)

Processes of Diagnosis	**Creation of awareness**
Future-design Processes	**Forming the will**
Psycho-social Change Processes	**Emotional Change**
Information Processes	**Information about what's new**
Learning Processes (in the stricter sense)	**Knowledge & Skills**
Implementation Processes	**Action!**
Managing of Change Processes	**Planning, steering, guiding, organizing**

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7 basis processes of change

Processes of Diagnosis

Future-design Processes

Psycho-social Processes

Information Processes

Learning Processes

Implementation Processes

Managing of Change Processes

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Processes of Diagnosis

Ability of Making Diagnosis

Creation of Awareness and Forming a Picture

- Diagnosing actually means „understanding".
- A diagnosis helps to understand, which forces and causes have lead to the present situation and which conclusions have to be drawn for the future.
- Therefore diagnosis not only means collection and analysis of data, but also interpretation and forming a picture.

Toolbox: **SWOT-analysis, employee survey, stakeholder interviews, internal and external customer surveys, customer conferences, delta-diagnosis, biography of an organization, self assessment, analyze the degree of commitment, etc.**

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Future-design Processes

Designing the Future

Decision Making

Develop directional statements, vision, model, and targets

- A far-reaching change process will only be successful, if the managers themselves present their future plans in an authentic and credible way.
- They should also manage to make their employees believe in the designed future.

Toolbox: **Mission statements, Shared vision, Developmental goals Target agreements, Scenario technique, etc.**

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Accompany Psycho-social Change

Consider the Emotional Side – Work on Conflicts
- Clear up misunderstandings
- Work on conflicts and tensions – deal with resistance
- Give up old role concepts, develop new role images
- Make relations of power discussable
- Confront, irritate

Toolbox: Role negotiation, Intervisions, Super-
visions, Dialogue, Conflict resolution talks, etc.

Design and Steer Learning Processes

Impart Knowledge and Skills – Be Facilitator and Coach
- Forget old action patterns and habits
- Connect seminar-learning with learning from experience
- Knowledge management – design systems and processes in such a way, that knowledge is developed, shared and cultivated.

Toolbox: Mastery-learning, Development-
programs, Intervisions und Super-
visions, Seminars, Specialist-coaching, etc.

Inform Purposefully

Be an Information Strategist
- Changes always cause a high demand for information.
- During change processes you are always confronted with the reproach of providing too little information – which is caused by uncertainty.
- Provide information especially about meaning and purpose of the change measures.

Toolbox: Visual management, Information markets,
Dialogue, Conferences, Large group interventions, All kinds of
media like papers, newsletters, videos etc.

Implementation

Be a Pioneer of Implementation – Act

- Set first steps quickly - not after months of diagnosis and target discussion
- Immediate coaching of the implementation
- Symbolic action – function as a role model

Toolbox: **The first 100 days of ..., Monitoring of the changes, Visual management, Quick-win-list, etc.**

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Plan, steer and guide the Change Process

- Form a steering committee
- Design the change process
- Build up a project-organization (as a parallel organization to the present structure).
- Provide resources.
- Control and evaluate the change process.
- Keep looking at the whole.

Toolbox: **Milestones in the change process, development-paper in form of a „living paper", etc.**

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7 Base Processes

Diagnosis Problems inventory, interviews, observations, facts collect and examine analyses and interpretations, autodiagnostics	Creation of awareness
Imagine the future Working out visions, models and aims; value statements, models of the future; making basic principles and strategies plans, programs	Forming the will
Psycho social change Let go old relations and build up new ones; clear and solve conflicts; changing motives, attitudes, expectations	Emotional change
Information Giving pre-information about meaning and purpose of the OD; Information newspaper, information markets about regular OD activities and their results	Information about what's new
Learning Training, exercising knowledge, action learning, establish experimental situations and pilot projects	Knowledge & skills
Implementation Converting in the organization; symbolic actions; make rituals, anchorage by instruments and structures; general conditions; forming routines	Action!
Managing the change Make budgets, designs, obligatorily plans of OD activities, coordinate, temporate; setting up special organs (steering group, project organization), deciding	Planning, steering, guiding, organizing

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Change Management: Tasks and Roles

If you as a manager want to change something, it is helpful if you ...

|		
1.	know what you assume, what the strengths and weaknesses are and what are the weaknesses and their backgrounds!	*Diagnostician*
2.	give clear orientation wherever you want, what it should look like in the future!	*Concept Developer*
3.	bring other people into the boat and create a good climate of trust!	*Relationship Manager* *Conflict manager*
4.	ensure that in the future, people will be able to acquire the necessary knowledge and skills!	*Trainer* and Coach
5.	honestly put those affected in the picture at the right time and listen to them!	*Information Strategist*
6.	really do the new and set an example, what must be done - do not postpone!	*role model*
7.	taking responsibility for the progress of change and actively involve others!	*helmsman/woman*

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7 Qualities of Change Management
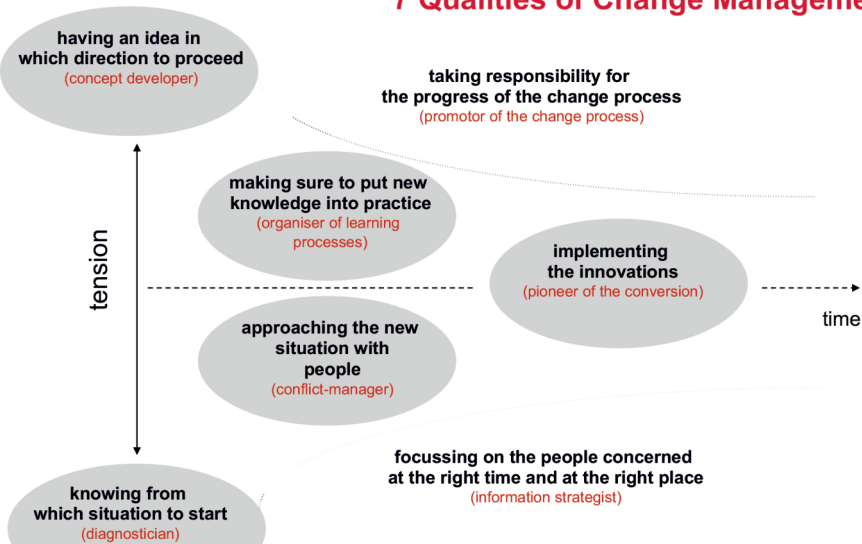
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Organization development for Estonian schools
Training for school board trainers

7 Base Processes of Organisational Development
1.06

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Friedrich Glasl

7 Base Processes of Organisational Development

Processes of Diagnosis Make an inventory of problems, questioning, watching, gathering and studying facts, analysis and interpretations, data feedback, self-diagnosis, get a picture of the situation	**Creation of awareness**
Future-design Processes Working out visions, models and goals; statements of value, models for the future; guiding principles and strategies, plans, drawing up programmes	**Willformation**
Psycho-social Change Processes letting go of old and creation of new relations; clearing and solving of conflicts; giving up old and adopting new patterns of behaviour; altering motives, attitudes and expectations.	**Emotional change**
Learning Processes (in the stricter sense) Imparting knowledge and skills, training, organising learning-by-doing, setting up experimental situations and pilot projects.	**Know-ledge & skills**
Information Processes Give advanced information about purpose and meaning of organisational development; information-paper, information-markets about current organisational development measures and their results.	**Information about what's new**
Implementation Processes Implementation within the organisation; symbolic acts; create rituals, embodiment by instruments and structures; prevailing conditions; constitute routines	**Action!**
Management of Change Processes Draft activities of organisational development, plan bindingly, budgeting, co-ordinating, temporisation; set up special organs (guiding-group, project organisation), decision making.	**Planning, guiding**

With different ranking, emphasis, and combination these
7 basis processes facilitate a vast variety of strategies
and courses of action.

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OD I

1.07

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The Trigon Understanding of Organizational Development with 4 important main goals (Friedrich Glasl)

- The ability of the organisation and its people to renew themselves.
- Increasing the problem-solving potential of the organization ("effectiveness goal").
- The design of the change process in the sense of human principles ("humanization goal").
- Enabling and supporting the organization to find an authentic synthesis ("authenticity goal") in tensions between the three target fields mentioned above.
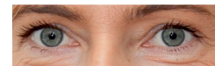
Organizational development is not only the result of a planning and shaping reason, but also the result of growth and development processes. In order to successfully implement change processes, we focus on the 7 basic processes of organizational development

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Systemic OE approach

Stimulating sustainable change in a system means ...

- to help the system to identify its own patterns
- to understand the forces acting behind the patterns
- to focus more on the processes, secondary on the results
- to recognize in a deeper sense what is actually going on
- to set interventions which cause appropriate disturbance, destabilisation, with the aim of constructive opening
- to enable the system in questioning and destabilizing itself
- to help themselves on a path of reorientation
- to regain stability and security at a higher level
- to find the next better solution - and not the absolutely best one

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What is the systemic
Perceiving, thinking, feeling, wanting and acting?

"What we need is a new view of reality:

the realization that much of what we see separately is connected,

that the invisible threads that bind them behind things

are often more important to what's happening in the world than things themselves.
[…]

To understand what our interventions are doing in a complex system,

we cannot avoid understanding the pattern of its networked dynamics

It's about the 'face' of reality,

to the recognition of patterns".

Frederik Vester:
The art of networked thinking

Character of TRIGON models ...
and our basic understanding

• Our models and our approach are

    - *not* normative   => no claim of truth

    - *not* purely descriptive   => provides more than just a dry
                                        understanding of the
                                        phenomena

    - *but* curative   **=> helpful, expanding awareness**
                                          and goal-oriented action

---

Approaches to change management

Think about ...

- Change needs mental conciousness

- Our feelings burn the thoughts into our soul (Somatic Markers)

- Nobody likes Change – except a wet baby.

- Nobody changes me, unless I change myself.
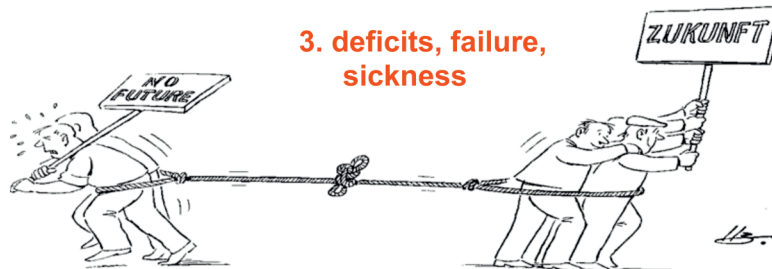
- Notice the what, more notice how. (Goethe)

Sustainable development processes are initiated by ...

1st awareness raising,
Insight into what is necessary
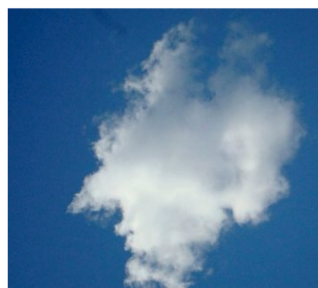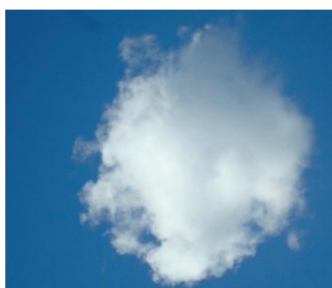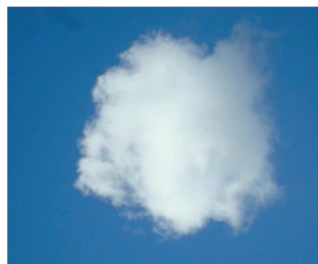
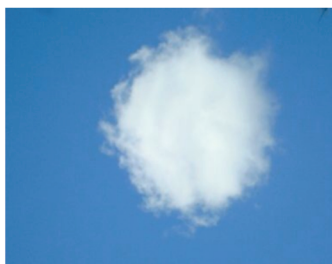**2.partnership and dialogue**
Support and demand

3. deficits, failure, sickness

Evolutionary Change

Change / Development

longer
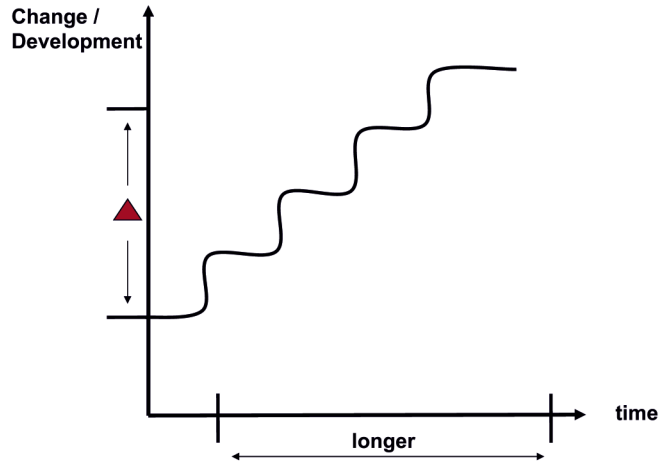
time

▲ = extent, extent, energy input, time, personal involvement

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Change = stability => resolution => stability

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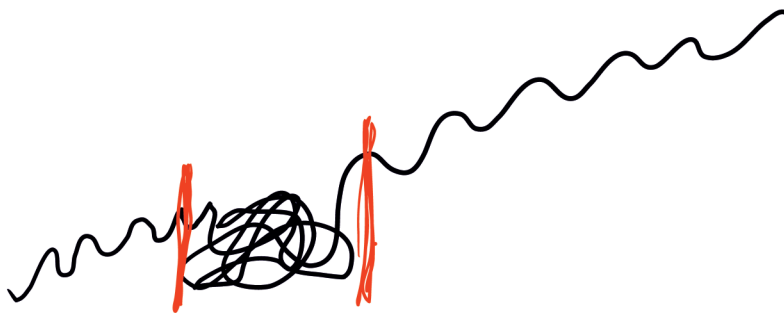
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Revolutionary Change

Change / Development

persistent tendencies

Revolutionary, drastic change

CRISIS

brief

time

= extent, energy input, time, personal involvement

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Approaches to Change

```
                          ┌──────────────┐
                          │    Change    │
                          └──────┬───────┘
              ┌──────────────────┴──────────────────┐
        ┌───────────┐                    ┌─────────────────────┐
        │ unplanned │                    │      planned        │
        └───────────┘                    │ change management   │
                                         └──────────┬──────────┘
                              ┌─────────────────────┼─────────────────────┐
                        ┌───────────┐        ┌───────────┐         ┌──────────────┐
                        │  Power    │        │  Expert   │         │ Development  │
                        │ approach  │        │ approach  │         │  approach    │
                        └───────────┘        └───────────┘         └──────────────┘
```

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4 Approaches to Change

	+	--
1.Unplanned, impulsive, spontaneous	Imitatiting, importing Organisation is alive, adapting, no stand-still	Can be chaotic, contradicting ideas, who can push his/her ideas (profile competition)
2.Power- Strategies	Frames can be implemented quickly, gives clear prepositions	Qualitative improvements cannot be achieved, power-counter-power fear, demotivating
3.Experts rational	Good for technological changes, innovative, consistent concepts	Implanting solution from different systems, blind for specific requirements, wasting situational knowledge
4.Developmental holistic	Effective for qualitative changes (attitudes), improving the organis. and the internal innovative resources, better implementation	Needs more involvement in internal resources, participation requires more time at the beginning of change process

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Approaches to Change
Focal Points, all approaches in every Conception!
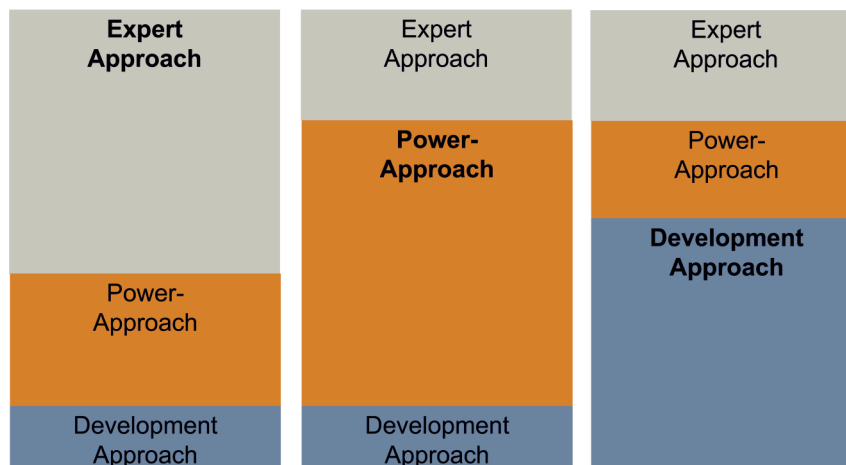
Expert Approach	Expert Approach	Expert Approach
	Power- Approach	Power- Approach
Power- Approach		**Development Approach**
Development Approach	Development Approach	

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Challenges in the change process

- Often trapped in pictures and models:
  Mechanical world of measurability, plans and programs
  Reality is a constantly changing living world

- Interventions, challenges, approaches to profound change are
  dynamic, non-linear and influence each other.

- System immanent compensating feedback:
  Consider the compensating counter-movement
  e.g. pressure generates back pressure and non-growing commitment

?! D I A L O G ?!

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Challenge in Change processes

Acceptance and committed implementation can only be expected if:

- The change as a whole is experienced as meaningful

- A personal benefit is recognized

- The perceived loss is bearable

- The personal benefit/loss balance is positive

- **Open questions**
- How is the meaning of the restructuring sufficiently communicated across the board and how can it be understood and accepted?
- How to deal with the resistance potential that can arise from the loss of perceived meaning and loved tasks?
- How to oppose the loss with an accepted added value / experienced personal benefit?
- How can the consequences and risks be assessed?
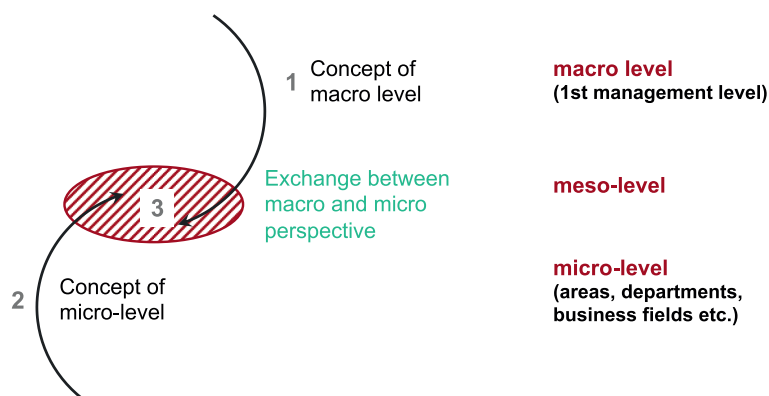 Real and diffuse fears delay acceptance development

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Macro, meso, micro system levels

1 Concept of macro level

macro level
(1st management level)

3 Exchange between macro and micro perspective

meso-level

2 Concept of micro-level

micro-level
(areas, departments, business fields etc.)

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Change processes as a touchstone for corporate culture and maturity of the organization

Culture in an organization
is decisively shaped

by the **behaviour
of powerful personalities**

in exceptional situations
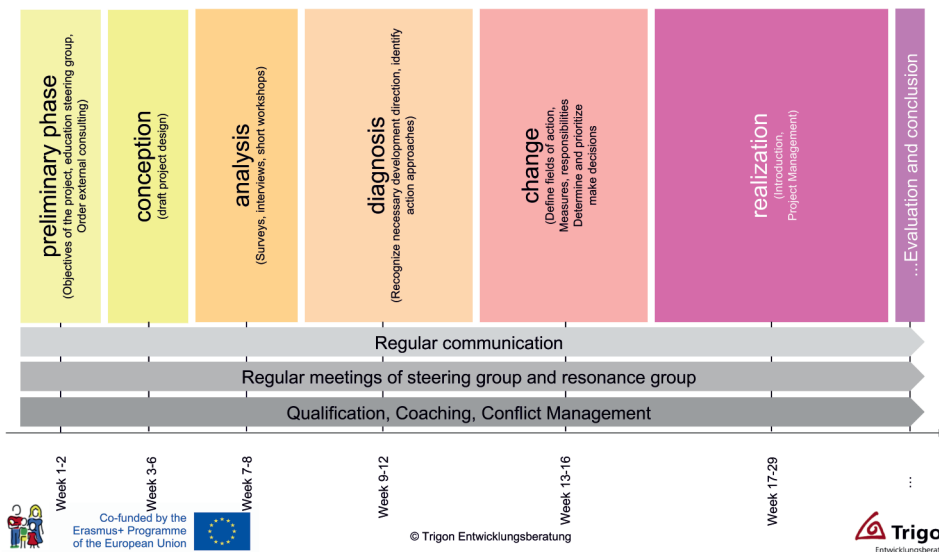(Change, stress, conflict ...)

= symbolic action

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Design of a possible sequence of an OD process

preliminary phase
(Objectives of the project, education steering group, Order external consulting)

conception
(draft project design)

analysis
(Surveys, interviews, short workshops)

diagnosis
(Recognize necessary development direction, identify action approaches)

change
(Define fields of action, Measures, responsibilities Determine and prioritize make decisions)

realization
(Introduction, Project Management)

...Evaluation and conclusion

Regular communication

Regular meetings of steering group and resonance group

Qualification, Coaching, Conflict Management

Week 1-2 Week 3-6 Week 7-8 Week 9-12 Week 13-16 Week 17-29 ...

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Training for school board trainers

Processes of **Diagnosis**

1.08

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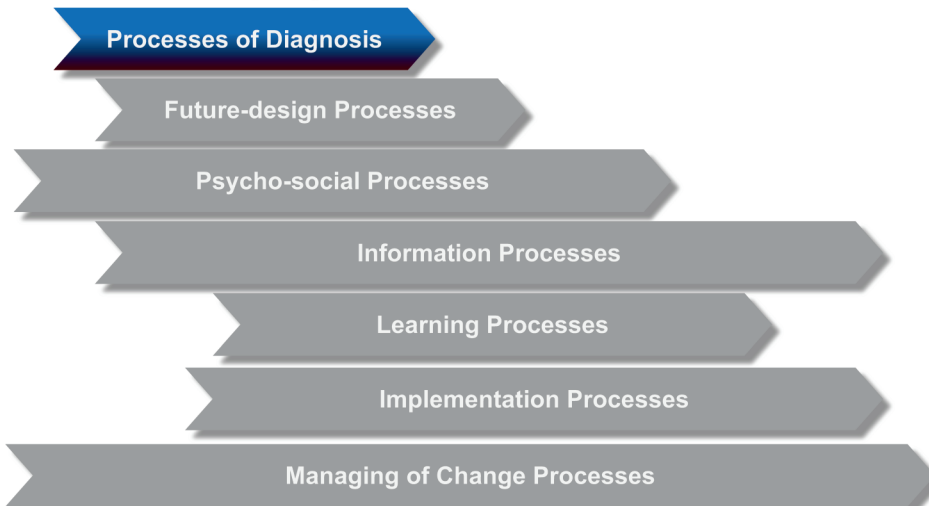trigon.muenchen@trigon.de, www.trigon.de

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7 Processes of change

Processes of Diagnosis

Future-design Processes

Psycho-social Processes

Information Processes

Learning Processes

Implementation Processes

Managing of Change Processes

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7 Processes of change

Processes of Diagnosis

Future-design Processes

Psycho-social Processes

Information Processes

Learning Processes

Implementation Processes

Managing of Change Processes

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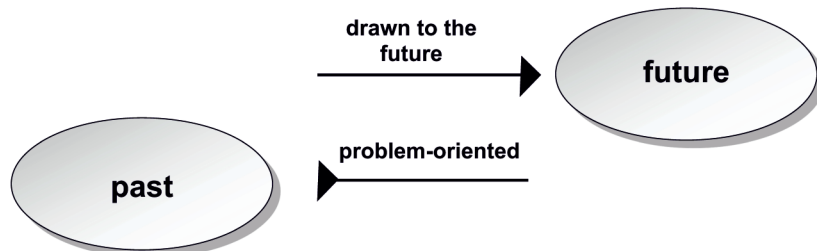
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Qualities of change processes

problem-driven Changemanagement

Future-oriented change management

drawn to the future →

future

problem-oriented →

past

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From data collection to diagnosis

- **data collection**
  - Describe objectively, if possible without evaluations/interpretations
  - Potential: What are we proud of?
  - Problem inventory: Where does the shoe pinch?
- **organizational analysis**
  - systematize data
  - In-depth individual investigations
  - Drawing up and testing hypotheses
- **organizational diagnosis**
  - See/recognize system pattern
    cycles of action
    development stage
  - Expose the underlying thought patterns

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diagnostic processes

- Getting an overview of the whole organization as a living system:
  - 7 essential elements (inside and outside)
  - seams
  - stakeholders
- Diagnoses are already interventions, because people learn to see their reality differently and then partly act differently.
- As far as possible, self-diagnosis by those affected
- Iterative, i.e. alternating between diagnosis and clarification of the future
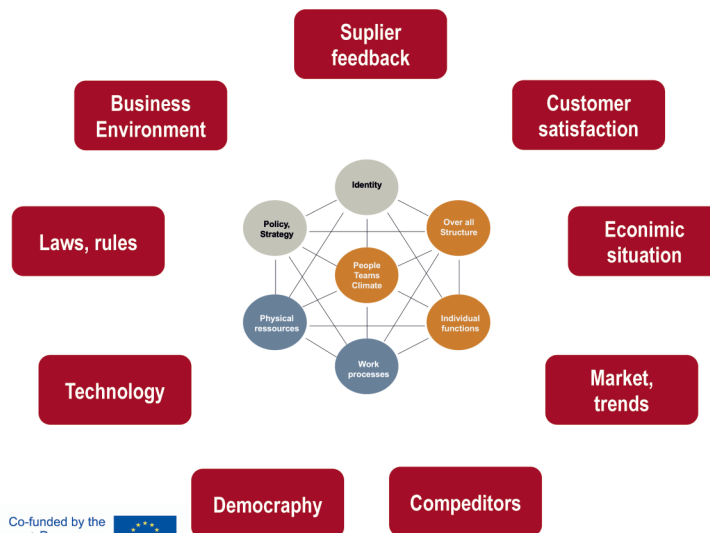- Rational as well as creative, imaginative, artistic methods

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Elements of an Organizational Diagnosis

Suplier feedback

Business Environment

Customer satisfaction

Laws, rules

Econimic situation

Identity

Policy, Strategy

Over all Structure

People Teams Climate

Physical ressources

Individual functions

Work processes

Technology

Market, trends

Demography

Competitors

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Relationship between diagnosis and target design

Danger too long, too intensive diagnosis:

- Discrepancy to target state becomes too large
- Increasing self-depreciation, pressure
- i.e. minimal self-esteem must be present
- (Safety under one foot!)

anxiety, fainting

Danger of too intensive design work:

- raised dream images
- large short-term campaigns
- Actual situation is tabooed
- collapses like a house of cards

hubris

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S P O T - Analysis

Satisfactions - Strengths

What's going well?
What can we count on?
What satisfies us?
What gives us energy?
What are we proud of?
What are our strengths?

Problem - Weaknesses

What's difficult?
Which disturbances hinder us?
What's wrong with us?
What's hard for us?
Where are our vulnerable spots,
self-referrals?

Opportunities - Opportunities

What else are we capable of?
What are the chances for the future?
What can we use in our environment?
What could we expand?

Threats - Dangers

Where are the dangers and risks lurking in
the future? What are the difficulties and
traps facing us?
What can happen to us? What undesirable
developments do we fear?

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The situation today

Satisfactions - Strengths

What's going well?
What can we count on? What satisfies us?
What gives us energy?
What are we proud of?
What are our strengths?

Problem - Weaknesses

What's difficult?
Which disturbances hinder us?
What's wrong with us?
What's hard for us?
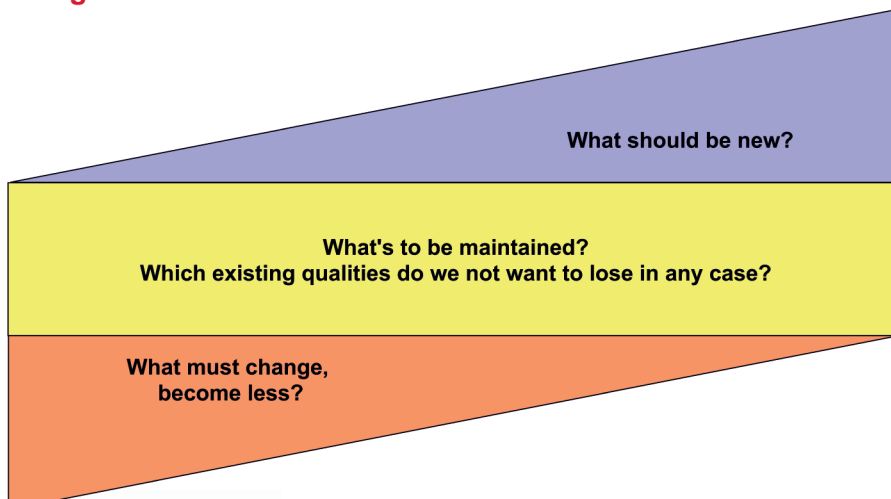Where are our vulnerable spots, self-referrals?

Needs for Action

What should change?
Where would we have to tackle?
Which specific Issues have special significance?
Which changes could really lead us to a step forward?

---

change balance

What should be new?

What's to be maintained?
Which existing qualities do we not want to lose in any case?

What must change,
become less?

Diagnosis of the situation

Assignment

**Function
Competences
Accountability**

We as a group
Our values
Our common experience
Our impulses

Me as a person
My values
My inner experience
My impulses
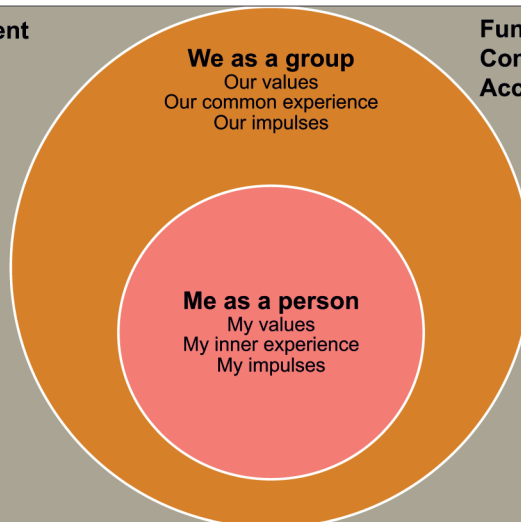
The environment
Feedback, needs, messages, impulses from us

U procedure (Friedrich Glasl)

What is now?
What do we want

1. How do processes and work flows function? Instruments, resources...

Technical and instrumental sub-system

7. How can processes be developed in future?

2. ... and how are functions, roles and management distributed?

social sub-system

6. ... what does that mean for new functions and roles?

3. According to which implicit/actual values, rules, does this happen?

cultural sub-system

5. What values and guidelines do we want for the future?

4. Is this what we want?

Systemic Organizational Diagnosis
Recognizing patterns, identifying effective forces

1. **A look at the big picture**
   metaphors

2. **System description**
   Gather phenomena
   Holistic models as a map
   (7 Essential elements,
   diagnostic dimensions, TCI triangle ...)

3. **Weighing and deepening individual system elements**
   Identifying key elements and pivots

4. **Work out systemic patterns**
   What happens again and again?

5. **Effective forces, investigating networks**
   Identify dependencies
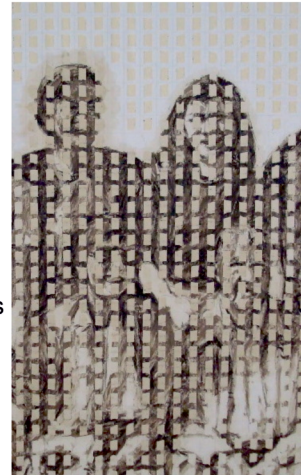
The four rooms of change

Identify in each field the 5 most important moods that live in our area today

1 Room of security, Clarity, contentment	**2 Room of irritation,** ambiguity, insecurity
4 Room of future, necessary next steps	**3 Room of emotions,** feelings, needs

Please enter one by one each of the rooms and write down what you think is important.

Take note of the already written messages and confirm them (exclamation mark) or relativize them (question mark) from your point of view.

Criteria for service quality

1. empathy to the person
Courtesy and attention to the individual personality

2. clarity of mind
Competence and expertise create solutions and credibility

3. Reliability in the process
to perform punctually and reliably what is promised

4. Speed of a solution offer
Willingness to provide immediate or rapid assistance

5. The organization's appearance
clear responsibilities, defined contact persons, appearance, image

---

Delta Diagnosis: Service Quality

1. empathy to the person
Courtesy and attention to the individual personality   0...25...50...75...100%

2. clarity of mind
Competence and expertise create solutions and credibility
0...25...50...75...100%

3. Reliability in the process
to perform punctually and reliably what is promised
0...25...50...75...100%

4. Speed of a solution offer
Willingness to provide immediate or rapid assistance
0...25...50...75...100%

5. The organization's appearance
clear responsibilities, defined contact persons, appearance, image
0...25...50...75...100%

Delta Diagnosis

	A	Satisfaction in %
1.	a	|------------------------ | 0...25...50...75...100
2.	a	|------------------------ | 0...25...50...75...100
3.	a	|------------------------ | 0...25...50...75...100
4.	a	|------------------------ | 0...25...50...75...100
5.	A	|------------------------ | 0...25...50...75...100
6.	A	|------------------------ | 0...25...50...75...100

Delta Diagnosis

	Excerpts from the Corporate Guidelines	%
1.	**We serve ourselves with the strategy of our market-oriented company.** We know our customers and their needs and expectations. We maintain a sustainable dialogue with our customers. We treat our customers as partners.	0...25...50...75...100
2.	**Our thoughts and actions are oriented towards goals and results** We set ourselves ambitious goals. We keep agreed appointments. We make decisions promptly and implement measures in a target-oriented manner...	0...25...50...75...100
3.	**We initiate and shape change for our success** We continuously review our thinking and actions. We promote innovation and learn from each other. We make our knowledge available to others without reservation.	0...25...50...75...100
4.	**We lead according to the situation - by promoting and demanding** We trust our employees. We promote the individual skills of our employees through regular feedback processes. We recognise good performance.	0...25...50...75...100
5.	**MITEINANDER is the basis of successful work** We bring our strengths to the team. We're honest with each other. We take mistakes as an opportunity for improvement.	0...25...50...75...100
6.	**Open information and communication create transparency and trust** We provide information in good time and actively collect necessary information. We keep our promises bindingly. We seek dialogue.	0...25...50...75...100

Prevent problems and errors

Which errors/problems have occurred during the last weeks/months?

Type of problem/error	Frequency (1 - 5)	Effects (1 - 5)

error portfolio
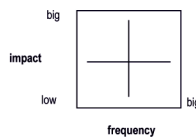
big
impact
low

big
frequency

Circle a problem

Describe the problem to be solved:

Under what **circumstances** ...	**does this problem** occur?	**Doesn't** the problem arise?

Two human sculptures
Before - After

- Please form groups
- Determine the sculptor
- Rapid exchange/agreement on a core message in terms of content
- No or only a few simplest props
- Spontaneous setting up of the members without a sculptor
- sculptor corrects and is the last one to come along.

- In plenary: "Close your eyes", then line up
- Stay frozen like a monument
- Every eye movement already reduces the effect
- "Eyes open" for up to 60 seconds,
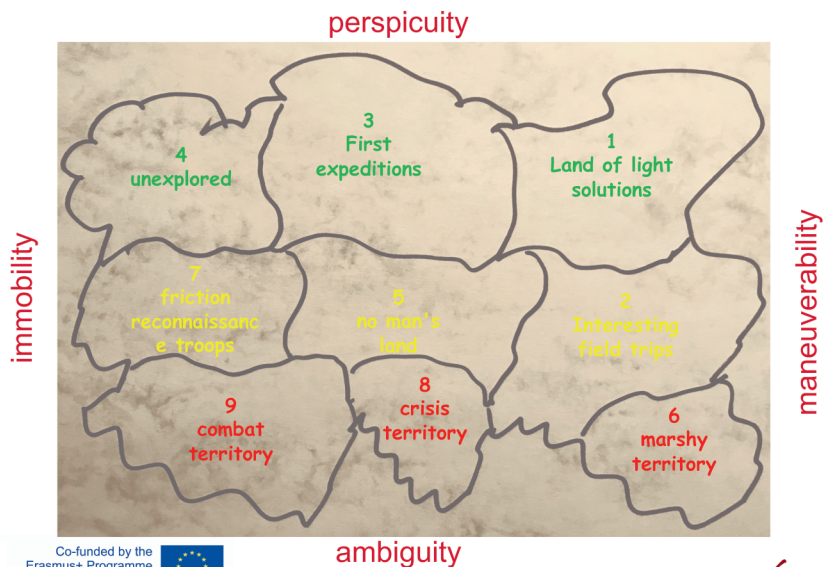 then "Close your eyes" resolution,
  then "eyes open."

Energetic Map

perspicuity

immobility

maneuverability

ambiguity

3
First
expeditions

4
unexplored

1
Land of light
solutions

7
friction
reconnaissanc
e troops

5
no man's
land

2
Interesting
field trips

9
combat
territory

8
crisis
territory

6
marshy
territory

What`s your story?

Please sit together in the table groups
for 15 minutes and
select 2-3 concrete situations,

as **positive examples** and as **negative examples.**

of cooperation in the past that can be considered.

The situations are then to be told in the plenum.
A red one and a green one in exchange

Looking ahead - How to continue
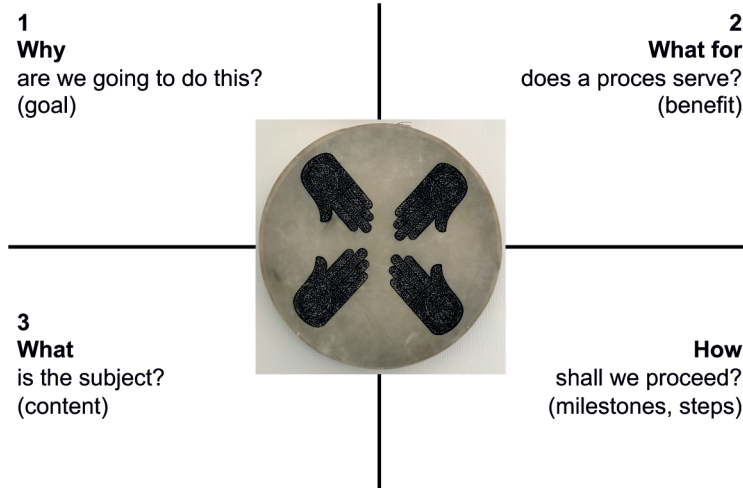
1
Why
are we going to do this?
(goal)

2
What for
does a proces serve?
(benefit)

3
What
is the subject?
(content)

How
shall we proceed?
(milestones, steps)

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Organization development for Estonian schools
Training for school board trainers

Change projects:
Questionnaire/pretest, assessment, evaluation

1.09

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Harald Jäckel

Questionnaire / Pretest

When I myself was affected by changes ...

Think of a concrete, clearly noticeable change in your organization that you did not actively pursue yourself, but whose effects you were affected by. Maybe this project should be changed: Objectives of the organizational unit; basic rules and principles of cooperation; structures of the organizational structure (subordination, management range, membership of an organizational unit); management styles; forms of teamwork; task and competence descriptions of the individual functions; information paths; working procedures; working methods; equipment of workstations with equipment, machines and instruments; spatial allocation.

Recall the time in which the change measures came to fruition in your memory. How did you experience all this back then? How did you feel about that? How do you look back today on the procedure back then?

The selected project should be typical for the approach to change projects in your area or company.

Then write it down with a few keywords:

The change was about the following:

_____

_____

_____

_____

I have followed the procedure ... (please tick)

☐ ... motivating
☐ ...demotivating.

Was the change sustainably successful?

I think the measure of change is ...
☐ ... succeeded excellently
☐ ... broadly successful

Assessment of change projects

Tick to what extent the above statement applies:

	This statement is correct ... % closed:	100%	80%	60%	40%	20%	0%
1.1	We knew what problems the actions were supposed to solve.	10	8	6	4	2	0
1.2	The causes and backgrounds of the problems were clear to us.	10	8	6	4	2	0
2.1	The goal and purpose of the change had been seriously discussed with us.	10	8	6	4	2	0
2.2	We agreed on the desired condition be-fore the actions were taken.	10	8	6	4	2	0
3.1	We were given the opportunity to come in contact with new forms of work, also emotionally.	10	8	6	4	2	0
3.2	Tensions and resistance among us were not hushed up but could be expressed.	10	8	6	4	2	0
4.1	The knowledge and skills required for the future were imparted to us in good time.	10	8	6	4	2	0
4.2	In the new situation we had the chance to derive improvements from mistakes made.	10	8	6	4	2	0
5.1	Again and again there was open infor-mation about the procedure.	10	8	6	4	2	0
5.2	The leadership tried to hear from us how we experienced things.	10	8	6	4	2	0
6.1	Our superiors set a good example for us when it came to implementation.	10	8	6	4	2	0
6.2	The innovations were well implemented. Something's happened!	10	8	6	4	2	0
7.1	Clear responsibilities have been created for the management of actions in the change process.	10	8	6	4	2	0
7.2	The timing was good: nothing was taken away, nothing was done in haste.	10	8	6	4	2	0

Evaluation of the questionnaire according to strengths and weaknesses in the change process

If I want to change something, I have to ...

	Points from the questions:		Own total :	Foreign sums:
1. ... know what situation I'm starting from	1.1	1.2		
2. ... have an idea where I'm going	2.1	2.2		
3. ... approaching the new with other people	3.1	3.2		
4. ... Make sure that the new knowledge and skills are practiced	4.1	4.2		
5. ... to put those affected in the right place at the right time in the picture	5.1	5.2		
6. ... really introducing and doing the new	6.1	6.2		
7. ... Taking responsibility for the progress of the change process	7.1	7.2		

Evaluation of the questionnaire according to strengths and weaknesses in the change process

If I want to change something, I have to ...

	Points from the questions:		Total:	
1. ... know what situation I'm starting from	1.1	1.2		= **Diagnostician**
2. ... have an idea where I'm going	2.1	2.2		= **Concept Developer**
3. ... approaching the new with other people	3.1	3.2		= **Manager psycho-social change pro-cesses**
4. ... Make sure that the new knowledge and skills are practiced	4.1	4.2		= **Designer and leader of learn ing processes**
5. ... to put those affected in the right place at the right time in the picture	5.1	5.2		= **Manager of Information Strategy**
6. ... really introducing and doing the new	6.1	6.2		= **Model for conversion**
7. ... Taking responsibility for the progress of the change process	7.1	7.2		= **Leader of the change process**

Organization development for Estonian schools
Training for school board trainers

Global Organization Diagnostics
1.10

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Global Corporate Diagnostics

You will always find four different descriptions for the points A to G. Indicate in the boxes at the right margin:

- Which formulation best applies to your **current situation**?
- Which wording corresponds most to your **target idea**?

e.g.

present	future
1	2

A. Goal/identity of the company

The meaning and purpose of our company live with us in the following way:

e.g.

present	future

1. The core objectives of the company are closely linked to the views of our management. They are their philosophy of life and their lifestyle. For this reason, employees often follow the personal motto of the company management.

2. The company's core objectives are mainly laid down in written statutes, official documents, etc. These are occasionally reviewed and reinterpreted as questions and ambiguities arise. It makes little sense to keep raising questions about the meaning and purpose of the company.

3. The goals, meaning and purpose of the company are not something rigid and self-evident. Discussions about this take place regularly so that managers (and employees) can deal with it down to the lowest level and identify with it.

4. The goals of the company are more or less large clear and are communicated within the company. They also serve to establish partner relationships with other companies that are close to our philosophy and support us as suppliers or customers or support and expand our range of services for customers.

B. Corporate policy and strategies

present	future

Corporate policy, guiding principles, long- and medium-term concepts, etc., are usually achieved in this way with us:

1. Management has the right vision and intuition and can inspire employees on many occasions, even if the goals and plans are rarely formulated. In order to know what the company's plans are, you have to have direct contact with the top management.

2. At the highest management levels, discussions take place (e.g. once a year) about the company's policy and strategy. The results are then precisely formulated and specified in a written form. They are then passed on downwards and explained if necessary.

3. Politics (guiding principles) and strategy are rethought and adapted in the "dialogue" between managers at different levels. It is very important to us that guiding principles and medium-term plans live in people and are not merely paper or kept secret from employees.

4. Managers shall involve their employees in the development and adaptation of the guiding principles and corporate strategies. They also take into account the corporate policy principles of the companies with which we maintain closer and lasting partner relationships and discuss these with them.

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C. Structures (1)

The top management exists with us

1. ... of one or more persons who have the operation safely in their hands. Even if several executives are at the top, it is quite clear to everyone who is actually the captain of the ship or the princess of the country.

2. ... of a group of people who have clearly defined tasks and competencies. This formally regulates who must decide in which matter and in which things one may not interfere.

3. ... of a team that is aligned to a common goal and subordinates the distribution of tasks to the goal. There are clear areas of responsibility, but the team handles them flexibly and unbureaucratically.

4. ... of a well-rehearsed team whose members complement each other well and who, if necessary, also involve members of the management of the partner companies in the decision-making process.

e.g.

present	future

C. Structures (2)

The following principles apply to our organization:

1. The organization should be as little as possible formalized. The individual departments or groups form loosely and casually around the most important management positions. Thanks to their direct contacts with their managers, the employees know exactly where their place is in the overall organization anyway.

2. The management levels are formally clearly demarcated from each other. Through the logical division of tasks, the owners of the positions know which part they are in the whole apparatus. Staff positions and line positions are clearly separated from each other.

3. The organization consists of manageable units that are geared to target areas or markets and function with a high degree of autonomy. The management hierarchy is kept quite flat, so that the decision-making paths are as direct as possible. In addition to the permanent functions, many employees perform tasks in projects.

4. The organization networks the various business units (Business Units, SGF etc.) which act very independently. These organizational units also have a great deal of possibilities in shaping their relations with external bodies (suppliers, sales partners, customers, political and cultural institutions). External people are always part of our management bodies.

e.g.

present	future

D. People, Leadership, Cooperation (1)

We are the
best place for employees to get ahead in their careers ...

1. if they're capable. This is then seen and promoted by the managers. Then you somehow come to a place where you can develop further. One can become something through commitment and achievement, because formal testimonies and likes are of secondary importance.

2. Employees are promoted if they behave correctly and with discipline. Benefits are periodically reviewed in accordance with recognized, objective assessment criteria. Staff departments ensure that the right people get to the right jobs.

3. Employees can develop professionally if they demonstrate good performance and the ability to work together. Supervisors and employees talk regularly to each other in order to coordinate the abilities and development intentions of the individuals and the requirements of the company. One of the most important management tasks is to actively take care of people's development.

4. Managers feel responsible for the further development of their employees and actively promote it. To this end, we also cooperate with our partner companies by carrying out joint projects, lending staff to each other when necessary and job rotation.

e.g.

present	future

D. People, Leadership, Cooperation (2)

When there are deeper disagreements
or conflicts in our organization, the following usually happens:

1. Ultimately, the one who has the better personal relationships with key leaders within the organization will stand and win.

2. The differences are submitted to the joint chief or another official body, which then decides the issue according to recognized and formalized rules.

3. Those affected find primarily and independently ways and means which do justice to the interests of the company. Only at last do the superiors or other helpers appear.

4. In most cases, those affected are able to deal with the conflicts themselves or organize to help for themselves. Conflict management skills have a high priority in the company because many functions are responsible for the management of internal and external interfaces.

e.g.

present	future

E. Functions (1)

The following applies to the individual positions or functions in the company:

1. First comes the man, then the job. In their function, employees have the leeway that suits them best. We have "tailored suits" for people so that they are not squeezed into a standard corset that blocks their abilities. We prefer to have "universal functions" in which you can perform a variety of tasks.

2. All positions are logically clearly structured and formally delimited. The employees know the logic of the overall apparatus and see themselves as part in the overall gearbox. Planning, execution and control are in principle assigned to separate bodies if possible. Specialization generally has a high priority.

3. The functions are clearly recognizable to those concerned. The functions are described according to the main tasks and the corresponding competences, but are not defined down to the last detail. Through clear framework specifications or target agreements, you can plan, organize and control a lot yourself in your function. Functions are a meaningful, recognizable whole.

4. Functions are an important orientation factor for both individuals and teams, but not a corset. Planning and controlling as well as management tasks are carried out by teams themselves, team management tasks can in principle also rotate or be transferred as speaker functions.

e.g.

present	future

E. Functions (2)

Special tasks are usually assigned in the following way:

1. First and foremost, people are deployed who have attracted a lot of attention. These receive a large advance of trust, which is more important than formal regulations.

2. Care shall be taken to ensure that the tasks are distributed correctly and in accordance with the official channels. Clear and detailed instructions ensure the smooth handling of special tasks.

3. First the aim and purpose of the special task are clarified so that the employees understand well the connection between their task and the rest of the whole. As a rule, a framework is set and a great deal of leeway is left so that the goals can be achieved as unhindered as possible.

4. Special projects are clearly assigned according to purpose, goal, task and date. The project managers are given clear competences, which means that they do not have to obtain the approval of their own superiors again and again. Employees of partner companies can also regularly participate in such projects.

e.g.

present	future

F. Workflows (1)

The process organization is characteristic for us:

1. There are few procedures and regulations. Everyone must be able to improvise a lot and be able to freely choose a suitable procedure in the situation, then the work goes best.

2. The work is carried out according to schedule and, if possible, according to standardized rules. The aim is to have all processes run as automatically as possible. More complex processes are planned and controlled by special coordination offices.

3. Planning points usually only specify rough plans for the processes. Afterwards the affected persons can regulate many details themselves. The responsibility for the smooth running of the project lies as low as possible to the executing employees.

4. The procedures are quite clear for all persons involved in them. They know quite well what happens before and after them. The management of the interfaces between the individual stages of the process and with external parties receives a great deal of attention because it is decisive for the continuous creation of value. The people involved in the   processes periodically talk about possibilities for improvement and implement them themselves if possible.

e.g.

present	future

F. Workflows (2)

We usually deal with delegated tasks in this way:

1. The superiors assign tasks to employees and naturally reserve the right to intervene at any time if they would do the work themselves differently from the employees.

2. Supervisors check that tasks are performed in accordance with rules, schedules, and instructions. It is also mandatory whether and how they can intervene.

3. Supervisors regularly discuss with employees whether unexpected things have happened for which they need help. They will act in such a way that they do not undermine the personal responsibility of the employees or draw the matter to themselves.

4 Superiors trust that normal procedures are largely managed independently by employees. One of its most important functions is to ensure smooth interaction at the interfaces to the upstream and downstream units.

e.g.

present	future

G. Material resources

For us, machines and technical aids mean the following:

1. The company's success does not essentially depend on the latest technology of our machines, but on the ability of the people who use them.

2. Machinery and technical equipment largely determine the course of business. The process organization must primarily adapt to the technical requirements, because one cannot ignore the factual constraints.

3. Machines and apparatus support human work and must be adapted to the ergonomic and psychological requirements of people so that employees are not appendages of the machines.

4. Machinery and equipment are designed not to obstruct the work of teams but to stimulate them as much as possible.

Global Corporate Diagnostics

Tick here what you have chosen as answers on the 7 pages:

	actual state				target state			
	1	2	3	4	1	2	3	4
A. Goal/Identity	☐	☐	☐	☐	☐	☐	☐	☐
B. Policy/Strategy	☐	☐	☐	☐	☐	☐	☐	☐
C. Structures (1)	☐	☐	☐	☐	☐	☐	☐	☐
C. Structures (2)	☐	☐	☐	☐	☐	☐	☐	☐
D. People/Leadership/Cooperation (1)	☐	☐	☐	☐	☐	☐	☐	☐
D. People/Leadership/Cooperation (2)	☐	☐	☐	☐	☐	☐	☐	☐
E. Functions (1)	☐	☐	☐	☐	☐	☐	☐	☐
E. Functions (2)	☐	☐	☐	☐	☐	☐	☐	☐
F. Workflows (1)	☐	☐	☐	☐	☐	☐	☐	☐
F. Workflows (2)	☐	☐	☐	☐	☐	☐	☐	☐
G. Material resources	☐	☐	☐	☐	☐	☐	☐	☐

Actual Evaluation sheet	1	2	3	4
A. Goal/Identity				
B. Policy/Strategy				
C. Structures (1)				
C. Structures (2)				
D. People/leadership/ Cooperation (1)				
D. People/leadership/ Cooperation (2)				
E. Functions (1)				
E. Functions (2)				
F. Workflows (1)				
F. Workflows (2)				
G. Material resources				

TARGET evaluation sheet	1	2	3	4
A. Goal/Identity				
B. Policy/Strategy				
C. Structures (1)				
C. Structures (2)				
D. People/leadership/ Cooperation (1)				
D. People/leadership/ Cooperation (2)				
E. Functions (1)				
E. Functions (2)				
F. Workflows (1)				
F. Workflows (2)				
G. Material resources				

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7 Elements of an Organization   (Friedrich Glasl)
3 Subsystems in a systemic net

Culturel subsystem

Identity

Policy, Strategy

Over all Structure

People Teams Climate

Social subsystem

Physical ressources

Individual functions

Technical subsystem

Work processes

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Questionnaire: School

I. IDENTITY:
How satisfied are you in your school with ...

1. Public image of the school
2. Attractiveness of our school
3. Identification of parents with the school
4. Identification of teachers with the school
5. Identification of pupils with the school
6. Relationship to the surroundings, to neighbouring schools, to the district, to neighbouring institutions
7. Dealing with each other (encounter culture)
8. Truthfulness, Honesty

II. POLICY, STRATEGY, CONCEPTS
How satisfied are you at school with ...

1. Further development ability/willingness of the school/ development projects
2. Strategies/ profiling the school
3. Implementation of strategies, goals and objectives
4. Fiscal policy
5. Public relations / external appearance
6. Cooperation with other schools/organisations
7. Value of the financial statements
8. Policy Personel
9. Quality Assurance/Quality Development
10. "Entrepreneurial" Initiative

III. STRUCTURE, EXECUTIVE BODIES (1)
How satisfied are you at school with ...

1. Pedagogical Conference
2. Stage Conferences
3. Advisory conference
4. Senior conference
5. Class conferences
6. Management
7. Board
8. Parents Representation/ Parents Council
9. Student representation
10. Official rules of the corporation

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III. STRUCTURE, EXECUTIVE BODIES (2)
How satisfied are you at school with ...

1. Salary system
2. Working time regulations
3. Parental contribution system
4. Transparency of structures
5. Clearness of structures
6. Division of labour/ distribution of competences
7. Confidence circle (conflict mediation committee)
8. Staffing with teachers (establishment plan)

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IV. HUMAN, GROUP, CLIMATE (1)
How satisfied are you at school with ...

1. Leadership style, participation in decision-making
2. Social Climate / Mutual Appreciation
3. Learning climate for pupils
4. Working atmosphere at school
5. Quality of encounters / exchange among each other
6. Commitment of the parents
7. Commitment of teachers
8. Commitment of pupils
9. Complaint handling
10. Conflict management

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IV. HUMAN, GROUP, CLIMATE (2)
How satisfied are you at school with ...

1. Dealing with resistance/ opposing positions
2. Quality of the teaching staff
3. Quality of school representatives
4. The joint basic work of teachers and parents
5. Relationship with former parents, pupils, teachers

V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (1)
How satisfied are you with ...

1. Quality of work of the daily school management
2. Quality of work of the Pedagogical Conference
3. Quality of work of the Administrative Conference
4. Quality of work of the Advisory Conference/School Management Conference
5. Quality of work of the class conferences
6. Quality of work of the class teacher conference
7. Quality of work of the teaching staff
8. Work quality of the personnel circle
9. Quality of work at the conference of the higher classes
10. Quality of work of the Management Board

V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (2)
How satisfied are you with ...

1. Quality of work of the organizational management
2. Work quality secretariat/ school office
3. Quality of work First aid
4. Quality of Work Therapies/ Therapy Circle
5. Quality of work of the Parents' Council
6. Quality of work School development
7. Quality of work of the student representatives
8. Quality of internal public relations work
9. Quality of external public relations work
10. Quality of work Mensa

V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (3)
How satisfied are you with ...

1. Quality of work Cafeteria
2. Quality of work of the economic circle
3. Quality of the work of the Contribution Orientation Committee
4. Quality of Work General Assembly
5. Work quality of the circle for festivals
6. Quality of work of the school parliament
7. Quality of work in the afternoon care of school children
8. Dealing with the rights and duties of high school students

VI. expirations and processes (1)
How satisfied are you with ...

1. Cooperation between the institutions
2. Application of agreed procedures/regulations
3. Information processes within the school
4. Consulting processes
5. Will building processes
6. Decision-making processes
7. Dealing with finances/money
8. Implementation processes of projects and plans
9. Evaluation and evaluation processes
10. Speed/ Effectiveness

VI. expirations and processes (2)
How satisfied are you with ...

1. Teacher cooperation
2. Cooperation between parents and teachers
3. Pedagogical weekend
4. Timetable
5. Parents' evenings
6. Representations in case of cancelled lessons
7. Supervision during breaks, before and after school
8. Recruitment of new teachers
9. Retirement of teachers
10. Cooperation of teachers

VI. expirations and processes (3)
How satisfied are you with ...

1. Admission of pupils
2. Retirement of pupils
3. School transport
4. Meal quality
5. School cleaning
6. School festivals in general
7. Enrolment ceremony
8. Michaeli + Johannifeier + Christmas celebration
9. Bazaar/ Martinus Market

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VI. expirations and processes (4)
How satisfied are you with ...

1. Open house
2. Graduation ceremony
3. Summer Festival/Autumn Festival
4. Farewell of the 12th class
5. School concerts
6. Monthly celebrations

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VI. PROCESS AND PROCESS - Teaching (5)
How satisfied are you with ...

1. Quality of teaching in general
2. Learning successes
3. Encouragement of self-employment/learning to learn
4. Age-appropriate address of the pupils
5. Personal development of students
6. Talent promotion
7. Support for weaknesses
8. Artistic teaching
9. Forming the class community
10. Development of social competence

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e.g.

present	future

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Global Corporate Diagnostics

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C. Structures (1)	☐	☐	☐	☐	☐	☐	☐	☐
C. Structures (2)	☐	☐	☐	☐	☐	☐	☐	☐
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E. Functions (1)	☐	☐	☐	☐	☐	☐	☐	☐
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F. Workflows (1)	☐	☐	☐	☐	☐	☐	☐	☐
F. Workflows (2)	☐	☐	☐	☐	☐	☐	☐	☐
G. Material resources	☐	☐	☐	☐	☐	☐	☐	☐

Actual Evaluation sheet	1	2	3	4
A. Goal/Identity				
B. Policy/Strategy				
C. Structures (1)				
C. Structures (2)				
D. People/leadership/ Cooperation (1)				
D. People/leadership/ Cooperation (2)				
E. Functions (1)				
E. Functions (2)				
F. Workflows (1)				
F. Workflows (2)				
G. Material resources				

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TARGET evaluation sheet	1	2	3	4
A. Goal/Identity				
B. Policy/Strategy				
C. Structures (1)				
C. Structures (2)				
D. People/leadership/ Cooperation (1)				
D. People/leadership/ Cooperation (2)				
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E. Functions (2)				
F. Workflows (1)				
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G. Material resources				

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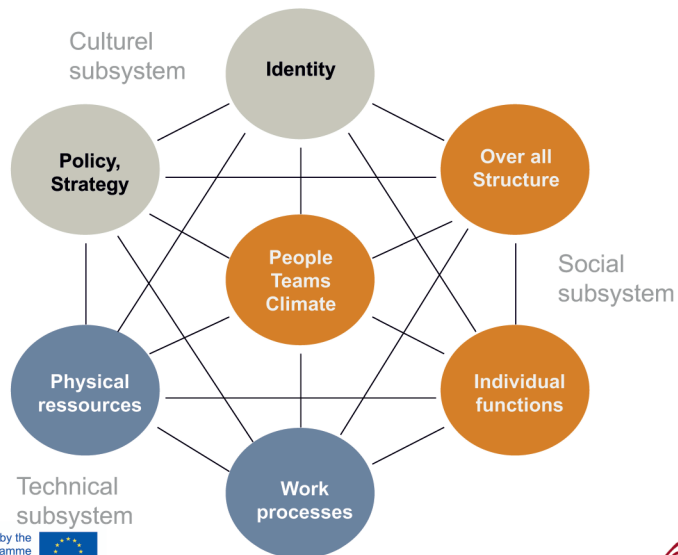trigon.muenchen@trigon.de, www.trigon.de

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Leading Concept

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7 Elements of an Organization (Friedrich Glasl)
3 Subsystems in a systemic net

Culturel subsystem

- Identity
- Policy, Strategy
- Over all Structure
- People Teams Climate
- Individual functions
- Physical ressources
- Work processes

Social subsystem

Technical subsystem

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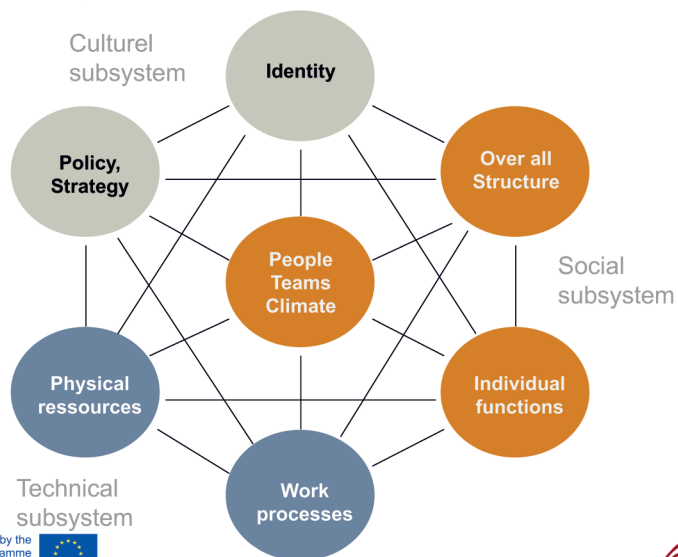
Questionnaire: School

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How satisfied are you at school with ...

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1. Leadership style, participation in decision-making
2. Social Climate / Mutual Appreciation
3. Learning climate for pupils
4. Working atmosphere at school
5. Quality of encounters / exchange among each other
6. Commitment of the parents
7. Commitment of teachers
8. Commitment of pupils
9. Complaint handling
10. Conflict management

IV. HUMAN, GROUP, CLIMATE (2)
How satisfied are you at school with ...

1. Dealing with resistance/ opposing positions
2. Quality of the teaching staff
3. Quality of school representatives
4. The joint basic work of teachers and parents
5. Relationship with former parents, pupils, teachers

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V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (1)
How satisfied are you with ...

1. Quality of work of the daily school management
2. Quality of work of the Pedagogical Conference
3. Quality of work of the Administrative Conference
4. Quality of work of the Advisory Conference/School Management Conference
5. Quality of work of the class conferences
6. Quality of work of the class teacher conference
7. Quality of work of the teaching staff
8. Work quality of the personnel circle
9. Quality of work at the conference of the higher classes
10. Quality of work of the Management Board

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V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (2)
How satisfied are you with ...

1. Quality of work of the organizational management
2. Work quality secretariat/ school office
3. Quality of work First aid
4. Quality of Work Therapies/ Therapy Circle
5. Quality of work of the Parents' Council
6. Quality of work School development
7. Quality of work of the student representatives
8. Quality of internal public relations work
9. Quality of external public relations work
10. Quality of work Mensa

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V. SINGLE FUNCTIONS
in the ORGANS and in the working contexts (3)
How satisfied are you with ...

1. Quality of work Cafeteria
2. Quality of work of the economic circle
3. Quality of the work of the Contribution Orientation Committee
4. Quality of Work General Assembly
5. Work quality of the circle for festivals
6. Quality of work of the school parliament
7. Quality of work in the afternoon care of school children
8. Dealing with the rights and duties of high school students

---

VI. expirations and processes (1)
How satisfied are you with ...

1. Cooperation between the institutions
2. Application of agreed procedures/regulations
3. Information processes within the school
4. Consulting processes
5. Will building processes
6. Decision-making processes
7. Dealing with finances/money
8. Implementation processes of projects and plans
9. Evaluation and evaluation processes
10. Speed/ Effectiveness

VI. expirations and processes (2)
How satisfied are you with ...

1. Teacher cooperation
2. Cooperation between parents and teachers
3. Pedagogical weekend
4. Timetable
5. Parents' evenings
6. Representations in case of cancelled lessons
7. Supervision during breaks, before and after school
8. Recruitment of new teachers
9. Retirement of teachers
10. Cooperation of teachers

VI. expirations and processes (3)
How satisfied are you with ...

1. Admission of pupils
2. Retirement of pupils
3. School transport
4. Meal quality
5. School cleaning
6. School festivals in general
7. Enrolment ceremony
8. Michaeli + Johannifeier + Christmas celebration
9. Bazaar/ Martinus Market

VI. expirations and processes (4)
How satisfied are you with ...

1. Open house
2. Graduation ceremony
3. Summer Festival/Autumn Festival
4. Farewell of the 12th class
5. School concerts
6. Monthly celebrations

VI. PROCESS AND PROCESS - Teaching (5)
How satisfied are you with ...

1. Quality of teaching in general
2. Learning successes
3. Encouragement of self-employment/learning to learn
4. Age-appropriate address of the pupils
5. Personal development of students
6. Talent promotion
7. Support for weaknesses
8. Artistic teaching
9. Forming the class community
10. Development of social competence

VI. PROCEDURES and PROCEDURES - teaching (6)
How satisfied are you with ...

1. Discipline
2. Trust, possibility of criticism
3. Dealing with conflicts in the classroom
4. Appropriate handling of disciplinary measures
5. Commitment of teachers to corrections, homework, class tests
6. Homework
7. Testimony
8. Exam preparation
9. Teacher-Pupil-Contact
10. Teacher-parent-contact/ information flow

VI. PROCEDURES and PROCEDURES - Teaching (7)
How satisfied are you with ...

1. Dealing with media
2. Quality of the parents' evenings of the class
3. Dealing with information media (e.g. Internet, library, ...)
4. Dealing with entertainment media (e.g. TV, mobile phone, tablet ...)
5. Work of the Parents' Representation
6. Stays abroad
7. Handling learning materials: copies, books...

VII. PHYSICAL MEANS, EQUIPMENT (1)
How satisfied are you with ...

1. Financial resources
2. Amount of the parental contribution
3. Teacher salary level
4. Amount of additional costs
5. Space available for lessons
6. Lounges
7. Condition of the school premises
8. School equipment
9. Condition toilets
10. Outdoor facilities, break areas

VII. PHYSICAL MEANS, EQUIPMENT (2)
How satisfied are you with ...

1. Sports facilities
2. School garden
3. Equipment with scientific teaching aids
4. Equipment of the workshops / manual work
5. Equipment sports hall
6. Teaching material/teacher library
7. Learning material/student library
8. Teachers' work rooms / workplaces
9. Student workspaces/places

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VII. PHYSICAL MEANS, EQUIPMENT (3)
How satisfied are you with ...

1. Computer workstations
2. Hall/ Stage
3. Costumes/ Props

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Organization development for Estonian schools
Training for school board trainers

Delta diagnosis
1.12

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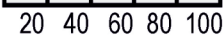
Delta Diagnosis: Innovative Capability

Harald Jäckel

1.　Corporate culture

1.1	Our organisation is ready to focus on on the topic of "innovation".	% 0　20　40　60　80　100　A
1.2	There is a short persuasive doctrine for innovation that is anchored in our company. f. e. "There's room for the new!"	% 0　20　40　60　80　100　A
1.3	Our experiences in the contact to the customer are a important impulse for innovation and change.	% 0　20　40　60　80　100　A
1.4	The organization gives to everyone trustworthy the inner and outer freedom, the creativity to unfold the individually.	% 0　20　40　60　80　100　A
1.5	We can turn the horror of the consequences of fundamental innovation into constructive energy.	% 0　20　40　60　80　100　A
1.6	Even unconventional ideas/concepts will be honestly tested to their chances of realization.	% 0　20　40　60　80　100　A
1.7	We develop as an organization a playful sense of Intuition to identify important development steps.	% 0　20　40　60　80　100　A
1.8	Promising innovative proposals / concepts will prevail against the vested rights.	% 0　20　40　60　80　100　A
1.9	We lead convincing innovative concepts - loop testing - honest and consistent into reality	% 0　20　40　60　80　100　A

2. Market positioning

		% 0	20	40	60	80	100	A
2.1	Our share of sales accounted for by mature/high-income and of young products/services are in healthy proportion.							
2.2	Our offer creates for us a recognized and secure future position for important key customers.							
2.3	Our know how and do how is asked by our customers for joint development processes.							
2.4	Our range of services makes us independent from a few price-sensitive key accounts.							
2.5	We can revoke the competition on price alone. especially from the low-wage countries							
2.6	Our specific distribution channels secure us access to the markets that are important to us.							
2.7	We offer our customers special after-sales services.							
2.8	We do not currently see any acute danger for our rangeof new developments or substitution products from competitors.							

3. Services offered

		% 0	20	40	60	80	100	A
3.1	We are continuously working on an increase of of differentiated customer benefit of our services.							
3.2	We develop continuously and sufficiently new products/services.							
3.3	We offer complete assortments and complementary offers in a targeted manner.							
3.4	We develop our offers as system solutions for our customers.							
3.5	The products/services we offer can be developed and expanded well in the future continuously.							
3.6	Our products/services are mature and only rarely lead to complaints.							
3.7	Our products/services are embedded in a sophisticated recycling concept.							
3.8	Our products/services fulfil all the recognizable legal requirements.							

4. Technology

4.1	With our technological know how and do we are a leader in process expertise.		% 0	20	40	60	80	100	A
4.2	Our products and services are technological leading.		% 0	20	40	60	80	100	A
4.3	Our services are difficult to imitate.		% 0	20	40	60	80	100	A
4.4	An imitation of our products/services require high investments.		% 0	20	40	60	80	100	A
4.5	There are currently no substitution developments for used procedures to recognize.		% 0	20	40	60	80	100	A
4.6	There are currently no substitution developments for our products/services to our customers to recognize.		% 0	20	40	60	80	100	A
4.7	We fulfil all the requirements to be able to use the possibilities of new emerging technologies at an early stage.		% 0	20	40	60	80	100	A
4.8	With us there are only very rarely technical complaints.		% 0	20	40	60	80	100	A

Organization development for Estonian schools
Training for school board trainers

Material for the portfolio method
1.13

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**"You can't teach a man anything.
You can help him discover it in himself!"**

Galileo Galilei

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**Targets,
that can be achieved with self-organised learning**

• Become a mature human being
• Self-confidence
• Self-determination, self-responsibility
• Independence in thinking and conceptual design
• Decision-making competence
• Problem-solving ability
• Learning competence
• Social Competence
• Communication capability

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My inner situation in relation to our project

Helpful questions for the goal finding process
(A goal is a future state)

- With which most important question do you deal in the project?
- Which are you up to?
- What's the point?
- What's the goal? How can you tell that the goal has been reached?
- What benefits do you expect for yourself and for others from achieving your goals?
- What would you have to do/ not to do in order to "fail successfully" with your goal?
- What does it mean for you to start with yourself?
- What do you need concretely that could help you?
- What made you decide to attend this seminar?
- Which question do you feel energy on?
- What should have been achieved through the seminar?
- What is the least you want to achieve in the seminar?
- Was there anything else?
- Your system? Dependencies?
- What other influences does the achievement of the planned goal depend on?
- What are success factors and what are failure factors for achieving your goals?
- What is your picture of the situation when the seminar is finished?
- What do you feel if you put yourself in your future situation and your seminar goals have been fully achieved?

Exercise: Examine my inner team – looking at the seminar

- Which thoughts, feelings or will impulses arise in me?
- When I personify these psychic impulses and give them imaginative
  If I give names, which inner team members will I become aware of?
- Which inner team members act loudly in the foreground?
- Which inner team members are silent in the background?
- Which team members are banished to the underground?
- With which team members is the team leader identified?
- Sketch the inner team constellation in the situation.
- What development issues should your inner team leader be dealing with?

Where am I standing?
What are my own life and career goals? Am I really following them?

1. Past

1.1 Which goals have I set myself for the past year?
1.2 How did I actually deal with it?
1.3 Which goals have helped me in my life?
1.4 How did I find these goals?

2. Future

2.1 What are my goals for next year?
2.2 How will I deal with them?
2.3 What hurdles do I already see on my way?
2.4 Where can I obtain accompanying support?

3. Fellows

3.1 What do I know about the goals of my colleagues?
3.2 How do I deal with it?
3.3 Do I support, do we exchange, do I confront?
3.4 What do I want to intensify?

4. Organization

4.1 How do my goals fit into those of my organization?
4.2 Are they contradictory or consistent with each other?
4.3 Are goals developed top down, bottom up, in dialogue?
4.4 What does that mean for me?

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Harald Jäckel
My personal profile

1. Which ideas inspire me the most?
2. What values do I stand for? My credo?
3. What are my favourite tasks?
4. How would my colleagues, friends, enemies, customers, competitors describe me?
5. What are my special skills and qualities?
6. How do they differ from the others? What difference makes a difference?
7. What am I not good at?
8. What am I most proud of?
9. What do I regret the most?
10. What deep psychological injuries have I experienced?
11. Which mental scars are still visible today?
12. For what, in which contexts, tasks, areas, constellations are my characteristics/skills particularly useful?
13. Which people have given me impulses on my path of development?
14. How have I transformed them till this day?
15. Which people are important to me today?
16. Who do I want to take care of, what relationships do I want to cultivate?
17. What goals do I want to pursue?
18. What tracks do I want to leave? What do I really want to achieve?
19. What are my greatest successes?
20. What are my biggest failures?
21. What do I intend to do concretely for next year?
22. How does my angel work?
23. How does my shadow work?

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An elementary personality model
(according to temperament theory, DISG model)

offensive - offensive
extroverted
externally oriented

**choleric person
fire**

active
decisive
assertive
consistently
willing to take risks
goal-oriented
irritable/injurtible
enterprising
confronting
jammed
enthralling

**sanguine person
air**

sociable
communicative
able to work in a team
erratic
proactive
optimistic
versatile
inquisitorial
distractible
cheerful
fleeting

fact-, result- and task-oriented

process - and people-oriented

conscientiously
quality-conscious
aspiring to perfection
critical
analysing
vulnerable
locked
sad
chill
earnest
sensitive

unruffled
steadily
helpful
empathetic
loyal
conservative
constant
patient
persevering
mediating
contented

**melancholiac person
earth**

**phlegmatic person
water**

reserved - closed
introverted

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What different needs do people have?

offensive - offensive
extroverted
externally oriented

**choleric person
fire**

**sanguine person
air**

Loves strong performances
Often demanding and decisive
Has high self-confidence
Addiction to confrontation, competition
Mostly urgent, impatient
Demands decisions

Interested in contacts
Want to get excited
Likes to be the centre of attention
Has spontaneous impulses
Bubbling with ideas
Likes to talk and a lot

fact-, result- and task-oriented

process - and people-oriented

Cautious and self-controlled
Often reserved
Sometimes stiff
Facts instead of emotions
Stands for clarity and order
Needs a lot of time and peace for decisions

Addiction Harmony
Will stability
Avoids risks
Please no confrontation
Always lovable
Seems shy
Little open for change

**melancholiac person
earth**

**phlegmatic person
water**

reserved - closed
introverted
radiating peace

EVERYDAY	12 ability to communicate	1 value orientation	FUTURE

11 flexibility

2 innovative capacity

10 resilience

3 Holistic thinking

9 learning ability

4 Professional competence

8 conflict ability

5 self-organisation

TEAM	7 implementability	6 commitment	METHOD

Me and my bad quality
(Ebbeckeohlen/Schweitzer 1989)

1. At the beginning: What is your relationship to this quality?
2. What do you do concretely when you show this quality?
3. To whom do you show this behavior, to whom do you not show it?
4. Since when did you decide to consider this a problem?
   Who thinks it's the least of the problems?
5. When do you (occasionally) not show this behavior?
6. What are the good reasons for this behaviour?
   Or: What good side effects does your behaviour have?
7. How could you push your behavior to the extreme?
8. Suppose you decided to give up your trait
   and you won't behave that way anymore:
   - What will be in which period (5 weeks, 5 months, 5 years)?
   - What are you gonna do instead?
   - What consequences will this have and how will you evaluate them?
   - How well will you find this decision afterwards?
9. At the end: What is your relationship to this quality now?

Inhibiting and driving

What inhibits, prevents you? What takes the strength away from you? What's in your own way?	What drives you? What do you draw energy from? What lies behind your commitment?

Acceptabal behavior
Getting power – but how?

<font color="#ffff00">-=https://www.ted.com/talks/adam=- proudly presents

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Your range of behavior

Get punished		Get rewarded		Get punished
Too weak	OK	Doing great	OK	Too strong

The low-power doublebind				
Don't speak up Get unnoticed				Do speak up get rejected

Your power determins your range of acceptable behavior				
Too weak	OK	Doing great	OK	Too strong
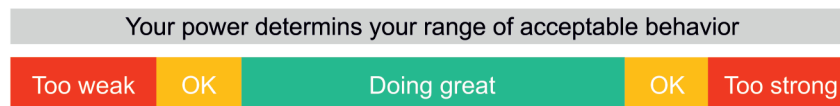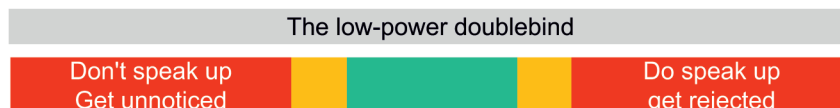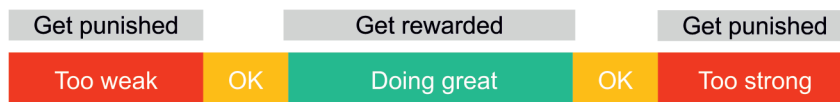
Expand your range of acceptable behavior

Look at

organizational development

guidelines

Guidelines for professional organisational development
OE Forum Switzerland

- **Holistic perspective**

  Organisations are open social systems with their own laws, values, stories and cultures. Sustainable changes can only be achieved if all factors and interrelationships are taken into account. Organizational development is therefore oriented towards a holistic view that views the individual, the organization, the environment and time as parts of a whole. OE work observes the networks, interdependencies and laws of social systems.

- **Efficiency and Humanity**

  Improving the performance of the organisation and the quality of working life are of equal importance and interdependent. Efficiency and humanity are the two sides of successful OE processes.

- **Balance of factual and social aspects**

  In organisational development projects, the current, concrete questions and problems of daily work are dealt with at all levels and in all areas of the company. They set in motion changes that are necessary to secure the existence and survival of the company.

  The contents of the OU's work can be corporate policy, strategic, operational or organisational issues. As a rule, dealing with these problem areas requires a diagnosis and reflection of the values, norms and power constellations prevailing in the organisation.

  Human and social aspects of problem solving (relationships, conflicts, motivation, personality development) are dealt with equally and in connection with the factual questions of formal organisation, profitability and control.

- **Contract and liability**

  The basis of an organisational development project is a clear contract between the clients, the participants and the consultants. It regulates the roles in the cooperation, the goals, the framework conditions, the responsibility and ensures transparency and commitment.

- **Participation of stakeholders**

  Sustainable solutions and sustainable changes must be broadly based. The quality and acceptance of the solutions is increased by the meaningful participation of those affected in all phases of the organisational development project. Those affected are involved in the process above all through active participation, open information and communication.

- **Transparency and trust**

  An essential element in the organisational development process is the open exchange of information and opinions between individuals and groups on issues of fact, behaviour and values. Through the regular feedback of results, findings and experiences to those affected, transparency and trust are built up.

Guidelines for professional organisational development
OE Forum Switzerland

- **leadership culture**

  OE work supports the leadership process of an organization. Organisational development projects are set in motion, controlled and supported by the power and decision-makers. The acceptance and support of this leadership claim does not contradict the participative approach, but is an expression of the holistic, resource- and result-oriented change strategy. The conscious examination of the existing decision-making and power structures forms an important part of the OU work and leads to changes in the understanding of leadership and the leadership culture of an organisation.

- **results orientation**

  Organizational development projects are focused on concrete results. Every measure is based on a sound, common diagnosis. Every diagnosis aims at a concrete measure. The results achieved are checked against the set targets and a high, comprehensive quality standard.

- **process orientation**

  Organizational development is a planned process that is aligned with agreed goals and results. The individual steps result from the evaluation and reflection of the previous work and the results achieved. The process takes place in rolling cycles of diagnosis, planning, execution and evaluation. This ensures that the planned procedure is continuously reviewed and adapted to the situation.

- **learning**

  Organisational development is a learning process for managers, employees and the organisation as a whole.
  Learning areas are:
  > the development of personal, social and entrepreneurial competence
  > the development of the organization's ability to learn and change.
  The learning fields also include the conscious examination of the market, the environment and entrepreneurial issues.
  Organisational development therefore assumes that people have a development potential that can be promoted (or blocked) by appropriate organisation of work, organisation and leadership.
  Personal development in this sense happens through learning through experience. People learn and develop in direct contact with other people and in direct confrontation with concrete problems that affect them.

- **Open conflict management**

  Professional OE work requires transparency in questions of power and interest. Conflicts are disclosed and dealt with according to the principles of organizational development. When conflicts are resolved by decisions of power bearers, those affected should be informed about the motives and criteria.

Guidelines for professional organisational development
OE Forum Switzerland

- **quality**

  OE work places high demands on the professional and social competence of the consultants. It requires constant further development in technical, methodological and personal areas and an active examination of one's own professional ethical views. Members of the Swiss OE Forum undergo regular and comprehensive collegial quality control through intervision and supervision of their projects.

- **Social dimensions of organizational development**

  The understanding of organisations as open social systems, which are directly related to other systems, has the consequence that change processes in the company have effects on the social, economic, ecological and political environment. Organisational development processes are therefore always social and political processes that bring about cultural, social and economic changes. People who develop and practise participative forms of cooperation and coexistence within a company also carry these experiences and values into other areas of society.

  OE work always means dealing with power. Genuine participation leads to a change in the decision-making and power structures and the understanding of leadership in the organisation. Independently thinking and entrepreneurial people require leadership based on partnership, authenticity, conflict resolution and open communication.

  Organizational development is a tool and philosophy for responsible and goal-oriented personal, organizational and social development and improvement.

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Organization development for Estonian schools
Training for school board trainers

Learning diary

1.17

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My learning diary:

1. What was the highlight of the seminar day for me?

2. What was the low point for me?

3. What insights have I gained ...
   about my person?

   in relation to my work (organization, project)?

   about my team?

4. Which methods did I like/dislike?

5. Which methods do I want to develop further?

6. What would I like to work on further (in the seminar, later)?

7. With whom did I have trouble within the current seminar?

8. What was my part?

9. What am I going to do?

10. About what could we not speak here today?

About learning

Guiding text of Section I (General Education) of the BMB

The school is a place of learning. Not the only one, but an important one. Learning children and young adults who are actively supported by teachers form the heart of school life, around which everything ultimately has to revolve. Learning and teaching therefore stand at the centre of SQA - School Quality in General Education.

Both aspects - learning and teaching - are understood in a very broad sense: *Learning* refers to the functional and interdisciplinary acquisition of competences by pupils as well as the development of their personality, social behaviour and linguistic competence. *Teaching* covers a wide arc ranging from the transfer of knowledge via learning organisation and learning support through to the highly personal support of pupils by teachers - which will probably only be possible in isolated cases.

What do we actually know about learning and its prerequisites?

About learning itself, strictly speaking - nothing. We could say a whole lot about the conditions under which learning functions better or less well, and we could investigate the outcomes of learning processes. We are presented with increasingly fascinating of the human brain - but they don't tell us anything about how electrochemical processes become ideas, experiences and emotions.

In this context, it doesn't actually matter. The topics here are education, teaching methods and didactics, and we can go a long way simply by looking at the most important scientific findings concerning the prerequisites for successful, sustainable learning:

- To begin with, a fundamental fact: Each person is unique. Personality, learning experiences, level of development, gender, talents - the number of distinguishing attributes is immense. For all the effort that school systems put in to classifying and categorising pupils, people are never homogeneous, not in themselves and certainly not in groups. They can never be that. Heterogeneity, in the sense of diversity, difference, is therefore quite normal.

- Moreover: Nothing is possible without learning. People are born to learn and are incapable of anything other than a life full of learning, consciously or unconsciously. Fortunately so, because we constantly find ourselves in new situations, having to find our way around. We don't always learn what we or others want us to learn, but cannot *not* learn.

- We also know that learning is about integrating the new into the existing. People always try to understand new information and experiences by putting them in context with what they already know and are capable of. In other words, it's not about simple addition, but an active, dynamic process that has a great deal to do with networks. The brain changes as it learns, and we have recently even become able to watch it at work. The more widely and deeply anchored the foundations, i.e. the existing competences, the better the chances of anchoring new information and experiences into them. And the more demanding the new, the more important it is to build on the existing competences.

- Learning does not function at the press of a button. If a person isn't motivated, they won't learn (what is desired). Curiosity and interest are such motivations, as is the desire to become more competent. These motivations are awakened when we are confronted with something new that we are unable to explain on the basis of our previous experiences or prior knowledge. We want to close this gap, but only when the topic appeals to us and we have the feeling that the effort is worth our while. Very small gaps aren't interesting enough, very large ones are quickly perceived as overwhelming or even threatening. So it's about the "medium-sized gaps" - particularly important for learning arrangements and the creation of tasks.

- People learn especially well when accompanied by pleasant feelings. What creates such feelings? Let's take a look at the mission statement of ÖZEPS, the Austrian Centre for Personality Development and Social Learning: "Each successful learning process is based on an appreciative, supportive relationship - that applies in particular to learning processes in school. Learners also need time and space to develop personal strength and to become socially competent." A positive relationship with the (teaching) person, especially at an early age, is an important prerequisite for pupils being able to find personal access to content - and thus meaning. Which naturally means that the teachers for their part have an in-depth relationship with the content they want to share with the pupils.

- And then there's the magic word: Trust. Trust in oneself, in the group and in the teacher(s). Worry and stress are bad teachers. Learning takes time and a stress-free space that allows mistakes - some would say enables mistakes - because we can only truly learn by making them. That's why it's also so important to clearly separate learning and achievement situations.

- Last but not least: Achievement. Achievement is encouraged, is important and strengthens the feeling of self-worth ("It was a difficult piece of work, but I did it!") and increases a person's willingness to take on new challenges, which leads to further growth in knowledge and competence. Positive learning outcomes and achieved targets set a spiral of motivation in motion - they can, in the truest sense, give us wings. Achievement and the joy of learning are therefore not a contradiction - quite the opposite!

What does that mean for teachers?

Above all that they are important. How teachers are and what they do makes the difference. There's nothing new about that. As Johann A. Comenius wrote in his Didactica Magna in 1632: "The first and last aims of our didactics should be to divine and explore the method of teaching, whereby the teacher needs to teach less, but the pupils to learn more; let there be less noise, tedium and useless effort in schools; in its place more freedom, pleasure and real progress." – Or about 370 years later, Heinz v. Foerster: "Learning is the most personal thing in the world, as unique as your face. But when the teacher teaches, the pupil becomes passive. One must realise that learning is not a process of copying. Learning is the most personal operation. Even more personal than lovemaking." Such findings fills libraries and many educators have long since made them their own.

However, only the pupils themselves can learn. In order for them to actually do so, the need a motivation. But people can only motivate themselves. We cannot motivate others, not even the best teachers can do that. What they can do, however, is create conditions in which people - in this case children and young people - are happy to motivate themselves, in which they are prepared to take on shared responsibility for their learning. Which also includes gradually learning to appreciate one's own knowledge and ability and to deepen one's knowledge about the effectiveness of one's own learning strategies.

Children and young people need stimulating learning opportunities ("learning environments") and they need active support and assistance in a stress-free setting. Sometimes, people need to be "seduced" into learning, because their interest isn't always a given from the outset. Sometimes, the pupils simply need information because the situation demands it. They constantly need help to undo "knots" in their learning processes, which in turn requires teachers to be able to look at the situation
"through the eyes of the pupils" and give them time to explore their thoughts. And all of this needs clear

instructions and structures, more for the uncertain learners, usually less for the more advanced. To summarise: The "right" model doesn't exist; its selection is always a question of the objective and ensuring that it is embedded in the overall methodical, didactic concept to the best possible extent. Which also means that teachers need an extensive repertoire in order to even be able to make a choice.

Of course, people are also social beings. We are not alone in the world, and we are constantly learning from one another, whether we want to or not. That includes, in particular, in school. Learning process are always taking place within groups; they are essential for the acquisition of self, social and professional competence in children and young people. Their diversity fundamentally increases the number of learning opportunities, even in conflict situations; but the same diversity also places very specific demands on the teachers. Whether these learning processes succeed depends largely on their professionalism.

Educational, psychological, methodological and didactic competences are therefore required; however, they are not enough. Good teaching is inconceivable without substance, without professional competence. A deeper relationship to and personal enthusiasm of the teachers for the subject play an especially important role. For all the enthusiasm for the contents, we should, however, never forget that teachers teach children and young people - and not subjects.

Ultimately, it comes down to the attitude, a basic educational attitude, which gives every pupil the feeling of being welcome in this school, in this class, from the outset. Good teachers like children and young people at least as much as their subject; they assume that each of them has the potential for development, even if it is hidden from view. They want to help them to discover and develop this potential; in doing so, they search first of all for their strengths and talents, and not for their mistakes. Such teachers embolden and can also let go, they have the ability to empathise without taking the pupils in. They can take a relaxed view of things, but also set clear boundaries where necessary. And they are authentic: What they say matches what they do. Pupils very quickly sense whether that's the case, and that's important to them.

There is no doubt that it is often very tiring to show or maintain this attitude in everyday life, that teachers also have nerves, that the basic and surrounding conditions at school can sometimes be difficult. There are limits to what is possible, no question. What is does come down to, however, is that the personal *effort* around this basic attitude always remains perceptible and is connected with the willingness to be
a learner oneself for one's whole (professional) life. Subjecting the pupils and their learning processes as well as one's own actions to ongoing reflection is considered to be one of the most important attributes of good teachers in the field of teaching and learning research. Evaluation and personal feedback help enormously here, even if they may sometimes be painful. – And last but not least: Nothing can happen without a bit of humour...

So where will the journey lead?

We have to finally say goodbye to the idea of wanting to constantly indoctrinate children and young people at school. This insight is nothing new, but it still hasn't made enough headway in the classroom: Pupils are not vessels to be simply "filled" with knowledge – knowledge that is furthermore based around a fictitious "standard pupil" that exists only in the statistics. And a knowledge that remains "lethargic" if it can't be tested and deepened in real life; a knowledge that can be passed on in examinations "at the press of a button", but is then quickly lost again because it hasn't become a competency.

The alternative? The current discussion about education is marked by two terms: Individualisation and focus on competency. This sounds a little awkward, admittedly, and provides some reasons for misunderstandings. In essence, however, it is as simple as it is obvious: *Individualising* learning and teaching means creating learning processes so that children and young people find sufficient opportunity to actively develop themselves, sometimes for themselves, sometimes in the community, in accordance with their individual personality and learning requirements. It would, however, be a mistake to want to create individual learning plans for every single child, because that would above all mean taking away the pupils' ability to learn for themselves. It would mean thinking for them, instead of enabling them to assimilate things for themselves, to become competent.

Because that's exactly what school is about: the acquisition of competences. As is usually the case with important terms, countless definitions are available. In Austria, the one arrived at by Franz Weinert has above all made it to the fore; he defined competences as *the cognitive abilities and skills that are found in individuals or can be learned by them in order to solve certain problems, as well as the associated motivational and social dispositions and abilities to be able to successfully and responsibly use the solution in variable situations*. Competence therefore always means knowledge, ability and intention, and thus also has a lot to do with attitude and outlooks.

The term 'competence' has a wide range of meanings. It means technical competence in the sense of a well-founded general education and interdisciplinary competences such as the ability to communicate or solve problems. It encompasses self-competence, social competence, the orientation towards a supportive system of values as well as the ability and willingness to take responsibility for one's own learning.

Understood in this way, competence becomes the basis for life-long learning, something we need more urgently than ever before nowadays. While it used to be possible to amass so much knowledge at school that it was sometimes enough for a whole (professional) life, we are increasingly unable nowadays to predict what pupils will need by way of knowledge and ability in ten of twenty years' time in order to lead successful lives. Moreover, the amount of knowledge in our world is multiplying rapidly, the (social) environment is changing much too quickly, and it has also become far too easy to obtain information and knowledge from the internet. – Put another way, and more succinctly: The school is no longer the laboratory in which "learn for life", but is life itself, in which we are constantly learning. Assuming that we open every door...

And what do the lead projects of the BMB have to do with all this?

Lots. Whether educational standards, New Secondary School, Teacher Education NEW, the new school-leaving and diploma examination or daycare in school: All these projects, measures and provisions have one thing in common: for all the diversity of the concepts and accents, they all point in the same direction by...

- perceiving pupils holistically, as independent personalities, whose development as individuals and members of society represents the central concern of schools
- observing the diversity of pupils in learning groups as both a normal situation and an opportunity at the same time
- seeing the learning community as essential for the development of the individual
- seeing learning as an everlasting, independent, highly personal activity of every individual, whose success and sustainability depend significantly on ownership and successful relationships
- calling for the most diverse learning offers possible for all pupils in the sense of equal opportunities in an inclusive school
- availing oneself appropriately and responsible of the possibilities of new information and communication technologies
- deriving from all of this the need for a shift in focus in the spectrum of teacher roles and teacher education by assigning more weight to active, encouraging and challenging "learning support" than before.

The **framework objective of the BMB from school year 2016/17** ("Further development of learning and teaching at schools providing general education in the direction of individualisation and competence orientation and inclusive settings") reflects this strategic alignment. SQA – School Quality in General Education serves as an instrument and tool for the planning, implementation and verification of focused measures.

SQA
Schulqualität
Allgemeinbildur

Of course, none of this is new and several schools have long since proved that learning and teaching understood in this way can succeed in practice. The legal framework also provides some information; it is interesting, for example, to read the "target section" (section 2 SchOG) in this light, and even more so the general parts of the current curricula and a number of decrees. Good things come to those who wait...

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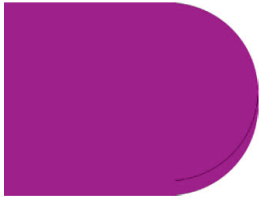
Education and school quality

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Introduction

The following definition and description of education and school quality is based on the current state of scientific research into education and school quality. It is intended to provide players in the Austrian school system with a sense of direction in their efforts aimed at further developing the quality of schools and teaching. It is neither a checklist nor a target catalogue to be "worked through", but can be very helpful when it comes to identifying and analysing relationships, influencing factors and indicators on the topic of learning and teaching in the sense of *SQA – School Quality in General Education*.

Map of education and school quality

The "map of education and school quality" created by Herbert Altrichter, Christoph Helm and Anna Kanape-Willingshofer (Institute of Education and Psychology at the Johannes Kepler University Linz) gives an overview of the quality areas of school and teaching and outlines factors that influence the quality of school and teaching.

What makes up the quality of school and teaching? The "Map of school quality" (Fig. 1) attempts to arrange various quality aspects and influencing factors.

The quality of a school is ultimately determined by whether and to what extent the pupils have learning experiences and achieve learning results that allow them to form an identify and feeling of self-worth, and to develop subject-based, interdisciplinary, social and personal competences for active participation in society, both at work and in their private lives. Learning and teaching in education and school is the place where these experiences and competences - supported and led by the professional knowledge of the teachers - should be acquired. However, school is not just a "learning space" but also a "living space". In the living space of the classroom and school, the pupils have social experiences in a larger group with specific rules. This is intended to satisfy basic human needs (e.g. security, recognition,...), but also enables learning about social relationships, work structures and democracy, about taking responsibility, reliability as well as giving and taking in social contexts.

The learning experiences that pupils have in the area of learning and teaching, as well as in the living space of the classroom and school, form, as it were, the internal workings of school-based work, in which the quality of school and teaching is decisive. The individual school works on providing favourable conditions for this internal activity. Through staff development and the further development of professionalism, teachers work on their competences for the productive design of the classroom and school as a learning space and living space as well as on their reflective competence. Leadership and school management contribute to a sense of focus and conducive conditions for the work of everyone involved. The active shaping of school partnerships and external relations is intended to involve the school partners, inform the surrounding setting

as well as uncover and nurture potentials for supporting the school.

What external influences on the quality of school and education are there? The "Map of school quality" (Fig. 1) illustrates that not everything depends on the "internal work" of schools; external influences also impact the work done by schools and the quality of their results. Some of these sources of influence are "far away", beyond the reach of schools, so to speak (e.g. statutory framework conditions, general economic development). The school is in contact with others or can make contact with them (e.g. higher education, municipality, feeder schools and consumer schools); it therefore has its own particular influence on whether these represent conducive, obstructive or neutral conditions for the school's work.

You can find more information on the Map of school quality in the appendix.

Six quality areas of education and school quality

The six quality areas of education and school quality, which stand at the centre of the map of education and school quality, are explained further here.

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At the centre of the "education and school quality" map are six quality areas which are explained in more detail below.

Quality area 1: Learning experiences and learning results

The quality of learning experiences and of the results of school activity can be seen...

- in the competences of the pupils:
  - The pupils acquire the technical competences described in the educational standards and curricula.
  - The pupils exploit the potential of their learning conditions.
  - The pupils build up the personal (e.g. social, learning-related, linguistic) competences stipulated in the tasks of the Austrian school, which enable active participation in social life, in politics, work, culture and family as well as in other educational processes.
  - Pupils with different social origins and/or special needs have equal opportunities to acquire competences and sit school-leaving examinations.

- in how pupils and other reference groups appreciate the school:
  - The pupils and their guardians evaluate learning outcomes, teaching/learning processes, educational work and social climate in positive terms.
  - Educational and vocational institutions that supply and consume pupils appreciate the work done by the school and the competences acquired there.
  - The school is positively perceived by the general public.

- in the physical and mental health of pupils, teachers and other employees:
  - Physical and mental health is considered to be an important aspect of curricular and work

arrangements in the development of curricula and schools, and is reflected in regulations within the school.

You can find more information on the quality area of learning experiences and learning results in the appendix.

Quality area 2: Learning and teaching

Quality in the learning and teaching of a school can be seen...

1) in the preparation and execution of the learning/teaching processes:
   - The accrual of technical and interdisciplinary competences is based on the attributes described in the area of learning experiences and learning results.
   - The teaching is cognitively activating and challenging.
   - The teaching gives the individual pupils a high proportion of real learning time.
   - The teaching is noted for technical and didactic quality (correctness, topicality, structuring, appropriately demanding,...) as well as for an appropriate practical orientation.
   - The teaching is clear and comprehensible; the meaning and relationship of the teaching contents is revealed to the pupils.
   - In the lesson, the learning and achievement requirements as well as the performance assessment criteria are transparent and insightful for everyone.
   - The pupils have the opportunity to learn independently and autonomously and acquire competences for autonomous working.
   - Stimulating learning environments, in which different sources of knowledge and media inside and outside of the school are used, are available.

2) in consciously dealing with different learning requirements and learning paths:
   - The individual learning requirements of the pupils (prior knowledge, experiences, potentials and interests) are diagnosed and taken as the starting point for tailored support.
   - Diverse methods and learning arrangements are used to build up knowledge and competences; they are aligned to diagnostic results, teaching objectives and contents.
   - Individual feedback strengthens the abilities of the pupil to reflect on progress and to develop responsibility for it.

You can find more information on the quality area of learning and teaching in the appendix.

Quality area 3: The living space of classroom and school

Quality in the living space of the classroom and school can be seen...

1) in a basic educational attitude:
   - The teachers involved in the educational process, the school management and other professional staff (e.g. free time educators, psychologists) formulate joint educational objectives.
   - The self-initiative of the pupils is strengthened, the taking of responsibility is stimulated and supported.

2) in the school and classroom climate:
   - Respect and a positive expectation of success characterise how teachers and pupils deal with one another.

3) in school life:
   - The pupils find diverse cultural, social, sports and other stimulations that promote their personal further development outside the classroom.
   - The types of organisation and approach facilitate the development of a school community, the social integration of the school community as well as the social integration of all members (e.g. through the recognition and appreciation of linguistic and cultural diversity, the promotion of the equitable co-existence of the genders, or the inclusion of people with and without a disability).
   - Transparent agreements and precautions exist for dealing constructively with difficult situations and conflicts (e.g. induction for new pupils and teachers, mediator programmes, consulting offers for pupils and teachers).

4) in school buildings, school premises and school infrastructure:
   - School buildings, school premises and school infrastructure are designed according to the criteria of

aesthetics, user-friendliness, accessibility and security.
- The pupils are actively and responsibly involved in shaping their school; this is a way of working against a lack of responsibility and vandalism.

You can find more information on the quality area of the living space of classroom and school in the appendix.

Quality area 4: Leadership and school management

The quality of leadership and school management can be seen...

1) in the coordination and control of educational processes:
   - The school management and work organisation are based on the tasks of the Austrian school and on supporting the development of the pupils entrusted to it in the best way possible.
   - (Self-)evaluation and quality management are used to verify the attainment of educational goals and to put sustainable development measures in place.

2) in the organisation and administration of the school:
   - The legal stipulations are taken into consideration.
   - The organisational structures are clearly traceable, adapted to local potentials and needs, well documented and economically designed; they support and simplify fulfilment of the education mandate.
   - The organisational structures enable and support the cooperation of all members of the school community.

3) in staff management:
   - The deployment of staff and the responsibilities are forward-looking, transparent, goal-orientated, designed in consultation with the staff and focused on the needs of the pupils.
   - The school management acts as a role model through its management and communication behaviour and educational competence.

You can find more information on the quality area of leadership and school management in the appendix.

Quality area 5: Professionalism and staff development

The quality of the professionalism and staff development of a school can been seen...

1) in the professional ethics of teachers:
   - Reflection and further development of teaching and school (e.g. obtaining feedback, self-evaluation, sitting in on other colleagues' lessons, evaluation of the results of the competence measurement for curriculum development) are assigned great importance.
   - The teachers are noted for their great commitment and high degree of willingness to innovate.
   - The teachers know about their educational and didactic expertise; for questions that go beyond this expertise (e.g. questions about the personal development of individual pupils), they involve qualified persons (e.g. educational psychologists, consultants, support teachers, psychagogues).

2) in the recognition and further development of teachers' competences:
   - A coordinated concept for the training and development of all staff (internal training plan) is available.

- The staff development strategy takes into account both individual needs (e.g. acquisition of new competences and certificates, vocational further development, maintaining physical and mental health) and school needs (e.g. focus on the development goals of the school, acquisition of qualifications for dealing with new target groups).
- Further education is supported both within the school and with regard to specific subjects.
- The passing on of experiences from training and development to colleagues and their incorporation into lessons is encouraged.
- A functioning concept for the induction of new staff is available, on which the school management and professional colleagues cooperate.

3) in a culture of cooperation in the school:
- The cooperation of various players (e.g. leisure educators, school psychologists, after-school supervisors) who participate in school life is coordinated.
- The teachers communicate with each other about the learning and personality development of pupils and work on this together.
- There are binding agreements about the work done in learning groups and/or school grades (lesson content, standards, education).
- The teachers take responsibility in the team and work actively on the further development of teaching and school.
- There are institutionalised forms of collaboration between teachers (e.g. professional groups, class teams, year group teams) with a high degree of commitment.
- Interdisciplinary teaching is enabled, realised and reflected.
- Knowledge and experiences are reflected on between staff and passed on to each other.

You can find more information on the quality area of professionalism and staff development in the appendix.

Quality area 6: School partnership and external relationships

The quality of school partnerships and the external relationships of a school can be seen...

1) in an intensive cooperation with parents and guardians:
- These are incorporated via the formal committees of the school partnership as well as actively incorporated into the design of the school.
- Communication with parents/guardians and other players takes place in consideration of the social, linguistic and cultural diversity in the school environment.

2) in active public relations work:
- The environment is informed about the school's achievements and developments.
- A willingness to cooperate and provide support in the environment is stimulated.

3) in an actively designed cooperation with facilities in the local area:
- The learning opportunities of the pupils are improved through cooperation with institutions in the local area (e.g. with the municipality, its institutions, associations and enterprises).
- Relationships are nurtured with supplying and consuming schools or other institutions (e.g. higher education, social and youth office, special educational centres, school psychology, health).

You can find more information on the quality area of school partnerships and external

relationships in the appendix.

General information on milestone and target-setting meetings

Milestone and target-setting meetings (MTM) are a central element of the National Quality Framework. They are held periodically between or within the levels of the school system (school management - education board - BMB).

MTM are important management instruments. They demonstrate dialogic leadership and a culture of agreement. They are characterised by a climate of basic respect for personality and expertise of the meeting partner and are held on an equal footing in this sense.

At the same time, the existence of management and controlling responsibility is clear: The respective manager is a "guardian" of the statutory and organisational framework conditions as well as of the implementation of federal/regional interests and topics. The controlling includes the possibility – even the obligation, if necessary – for the management level to make a picture for itself about the MTM "on site" "Inspection", however, is no longer the basic pattern.

The binding nature of the MTM is arrived at by signing the written agreements. A revision loop can be set up in the event of any need to make changes.

The MTM - in the sense of "dialogic management" - are essential talks between two managers (i.e. between the principal and compulsory school inspector or between the regional school inspector and the head of the relevant school managing department in the BMB). Because: agreement is a "matter for the boss". The latter also applies in those cases in which several people meaningfully participate in the discussion: The agreement itself is a matter for the managers.

The MTM follow a specified structure. The basis and starting point of the MTM are the development plans as well as other relevant documents that are made available to the managers in advance.

MTM should ideally take place once a year. This is not always possible due to the partly unfavourable proportions (especially in the area of PSI - Schools). Corresponding regulations and discussion models are agreed with the states on the basis of a federal framework specification.

The BMB has organised qualification series for the education board and management staff in the BMB (Section I) since 2012. A similar further education series for all principals is offered by teacher training colleges on behalf of the BMB.
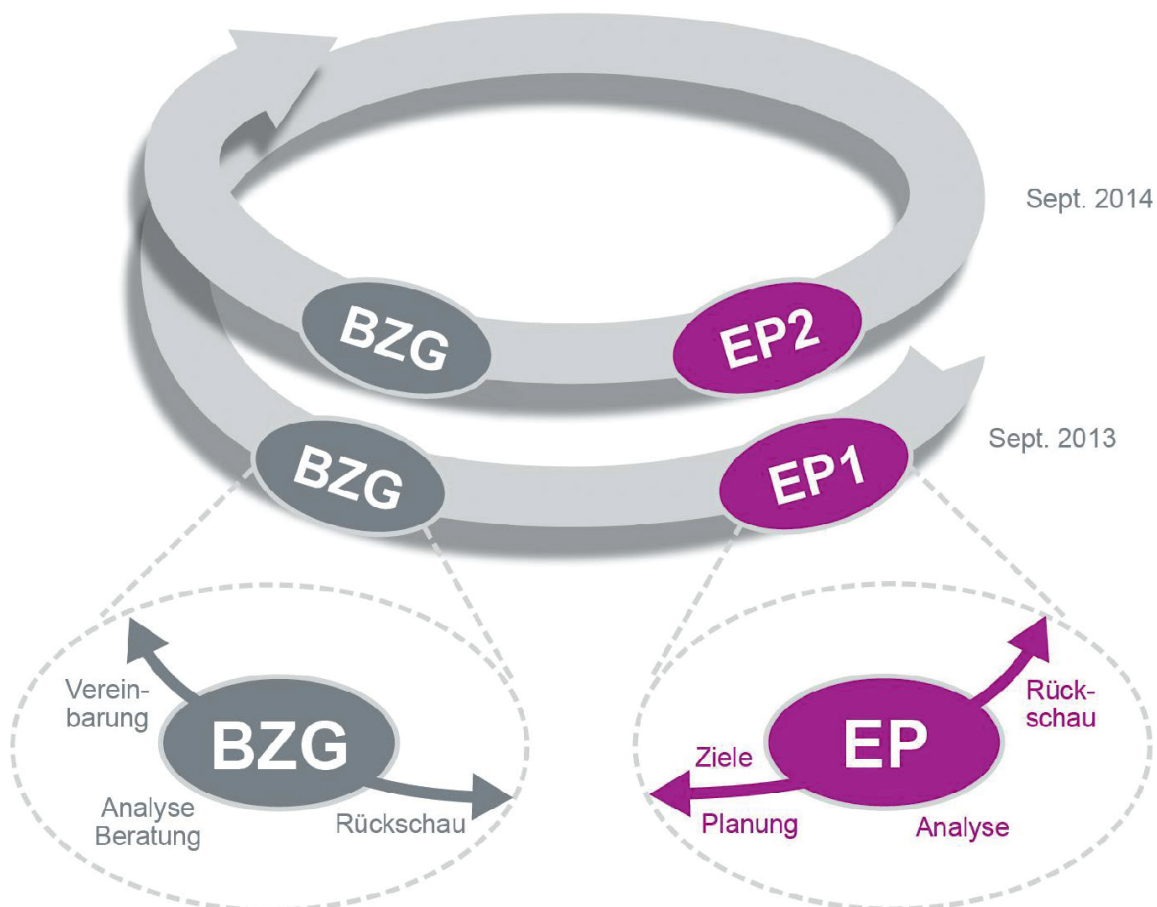
Development plans and milestone and target-setting meetings

Development plans and periodic milestone and target-setting meetings are the two central elements of SQA. But what is behind these terms?

Development plans (DP) are also a planning instrument and proof of quality development or quality assurance in the sense of accountability towards the general public. They are elaborated on all levels of the general education system and are predominantly analytical, with a focus on targets and results. They form the basis for the milestone and target-setting meetings.

The milestone and target-setting meetings (MTM) demonstrate dialogic management and a culture of agreement. They are characterised by a climate of basic respect and are held on an equal footing. They are made binding by putting them in writing. The MTM are based on the development plans as well as other relevant documents made available to the managers in advance.

The following graphic highlights how DP and MTM intertwine with each other.

The development plan (DP) takes up a topic and starts with a review: What did we succeed in doing? What not (yet)?

The milestone and target-setting meeting (MTM) also begins with this analysis. The meeting partners then jointly evaluate the targets contained in the DP and estimate the prognosis for success of the planned measures. The question always asked here is how the success will be identified (indicators).

The discussion over the need for further education and support results in a written agreement under which both parties commit to uphold their promises.

You can find more information on development plans and milestone and target-setting meetings under the main menu items DP Development plan and MTM Milestone and target-setting meeting.

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