

Change Management and Knowledge Retention in Ever Changing Schools

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My History and Context

- Deputy Head of School for Learning Technology, British School of Jakarta
- Chair-Elect of the Board of Directors, ISTE
- International EdTech Consultant, Speaker, Author

- 15± years of experience
 - Teacher – IT, Informational Literacy, Math, PP, EE
All grades PreS -> GradS
 - Senior Administrator

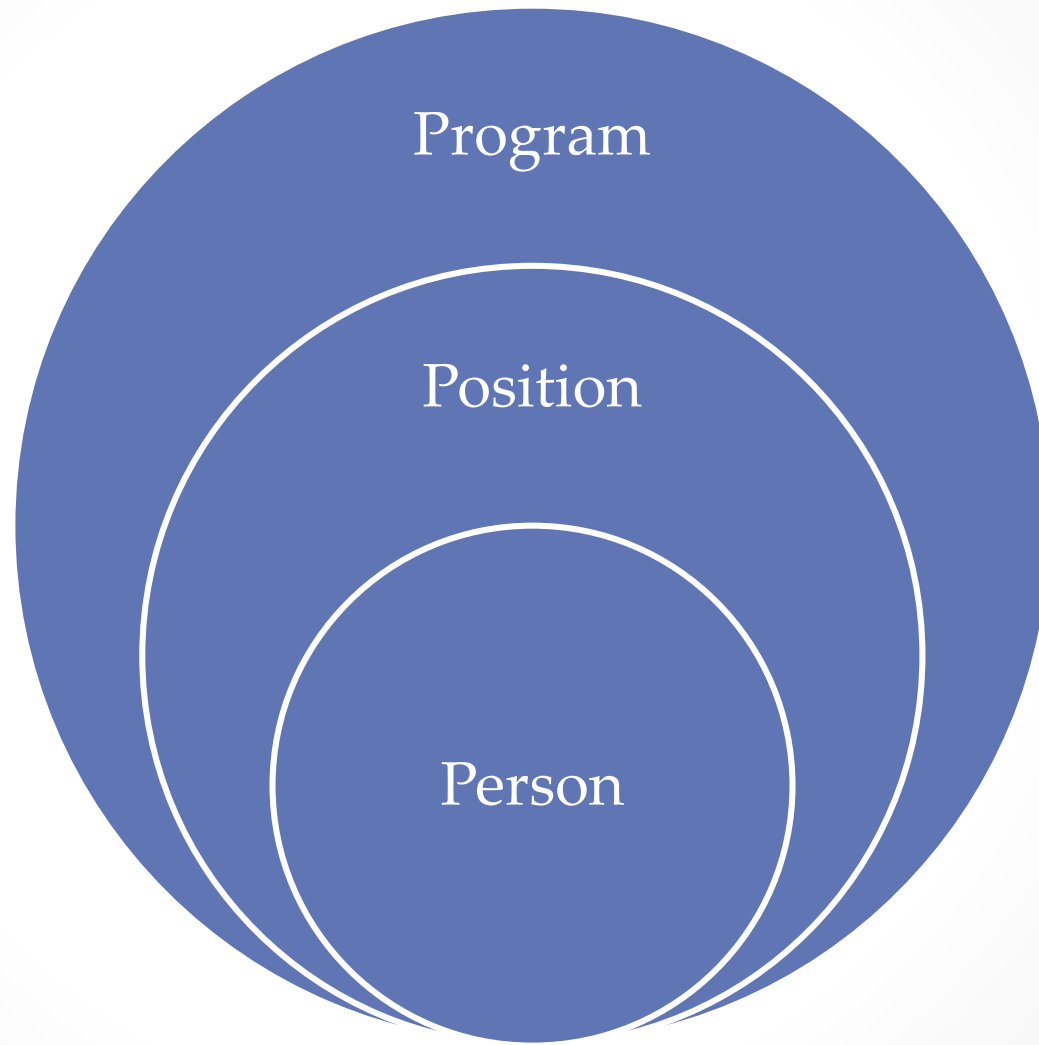
- Educational Doctorate in Educational Leadership
- Worked in private schools, international schools, universities

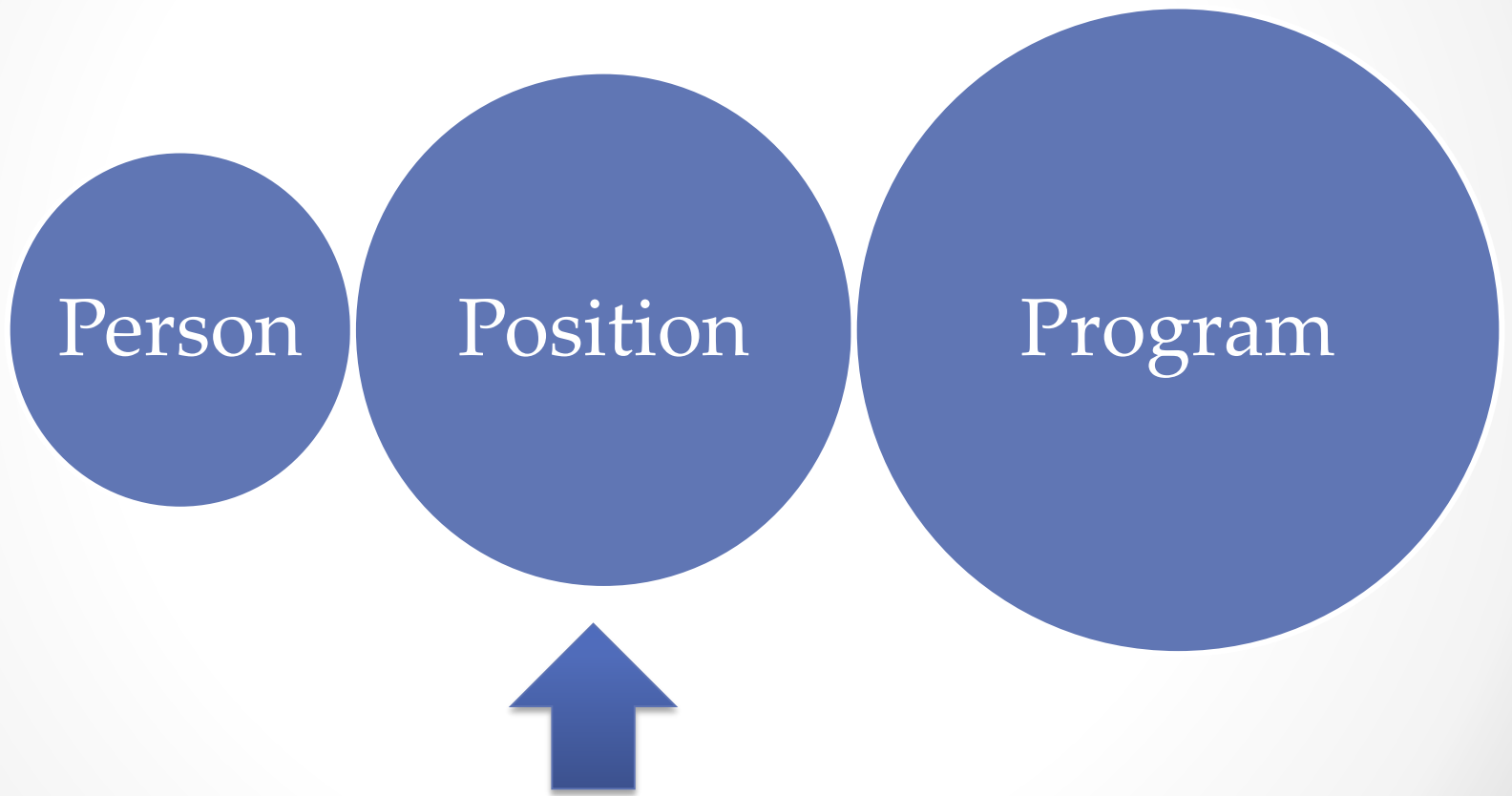
- Currently engaging it myself
 - Changing positions and schools in 2015

Do you need to...?

- Maintain all data
- Keep a record of all history
- Transfer all knowledge
- Ensure a smooth transition
- Keep a resource for future reference

Change management is the retention and transfer of knowledge needed to ensure continued delivery of an organization's program.





Programmatic knowledge is used by **positions** that are held by **people**.

To ensure continuity of program, focus your change management efforts on the position, not the person.

In a position, where does programmatic knowledge exist?

It exists in three forms:

1. Essential information
2. Resources and connections
3. Experience



You need to create a **change management system** that:

- Focuses on key information
- Is reliable, efficient, and easy to use for those who are recording
- Is dynamic and alive
- Is accessible for those who are receiving
- Informs your organization of resources

A Change Management System for Schools

1. Task list
2. Identify positionally held knowledge
3. Explain resources and connections
4. Tell your stories

1. Task list

- Generate a list of known tasks and responsibilities for the position
 - Review of daily activities
 - Emails
 - Calendar
 - Organizing files
 - ...not usually the job description
- This is a guiding document that will change over the entire process.
- Internal document intended for the recorder, not the receiver.

Task List

- Keep it simple
- Use Excel or Google Sheets
 - Perhaps a To-do App like Wunderlist
- Include
 - Task
 - Priority
 - Relevance
 - Resources
 - Responsibility – you don't need to everything
 - Date completed

2. Identify positionally held knowledge

- What knowledge do you as XXX, and you alone, know or have control over?
 - This is not information that is shared with others
 - It is not information that can be attained by outside sources
 - It is ONLY available in this position
- Very difficult to create this list at the outset
 - Usually takes a long initial list that is reduced and paired down as the process continues
- People come to learn that there is very little they have complete ownership over

Positionally Held Knowledge

- Create a series of archives
 - Documentation, communications, narratives
- Create a Table of Contents with notes and links
- Give a stop light level of value or confidentiality
- Ensure security and legacy
 - This is a point-to-point exchange
 - Could be highly confidential
 - May need to outlive the tenure of the new person

Areas of Consideration

- Order important
- Workfield
- Takes up time?
- Impact on decisions or processes
- Who partially shares the knowledge
- What processes are in place to transfer knowledge
- Further notes

3. Explain your resources and connections

1. Go back to your task list
2. Ask, “when I do XXX whom do I work with and what resources do I use?”
3. Create mind map of your key resources
4. Under each, list the task you use them for and where to find them
5. Make sure to explain both the boxes and the lines
6. Reduce your positionally held knowledge list
7. Reduce your task list



Resources and Connections

- Excellent task for direct reports
 - Have each person explain their role, key tasks, and important connections inside and outside the organization
- Create a matrix of roles
 - Excel or Google Sheets
 - Explain role, responsibility, knowledge held within
- Create a mind map of connections
 - A graphic representation of key connections
 - Color-code your relationships to describe why/when/how
- <http://lifehacker.com/five-best-mind-mapping-tools-476534555>

4. Tell your story

In a way that is easy to create AND easy to access,

- Explain YOUR experiences with particular elements of the program
- This will likely be an interview, video, or short narrative
- Keep it short (10-15 minutes max)
- Tell your story...but not your judgment.
 - Let your successor come up with their own opinions
 - Make sure to focus on what was done, why it was done, and what's next

Suggested Interview Script

- Please describe the program and illustrate why it is important (1 minute)
- What were your experiences with this over the last X years? Or What is the history of this program? (3-5 minutes)
- What is the next step for this program? What are some challenges you expect? (2-4 minutes)
- What are the key points to remember or consider? (1 minute)
- Any other important points or history? (remaining time)

Suggested Method Self Created/Managed

- Create a PPT with main talking points
- Use a program like OfficeMix to record your voice telling your story
 - <https://mix.office.com/>
- Use the tools to highlight key points
- Upload and share
- This is a multi-modal approach that hits written and auditory methods of story telling

What is missing?

- A detailed organizational history
- Personal judgment of events or people
- Prioritization of tasks
- A calendar
- Copies of curriculum
- A complete picture of the position and its scope

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Questions?