

Making the Grade in the Information Age: Transformation Strategies for Higher Education

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INTRODUCTION

The final year of the 20th Century has been rife with predictions about information technology and its transformational impact on our personal and organizational lives. The way we work, play, and learn continues to be shaped by the tools, techniques, and talents of the information technology industry. As any college or university administrator, faculty, or staff will attest, Higher Education is not immune to this climate of transformation. Indeed, Peter Drucker predicts that “in the next 50 years, schools and universities will change more and more drastically than they have since they assumed their present form more than 300 years ago when they organized themselves around the printed book.”

Hyperbole aside, there is little doubt that technology transformations are the order of the day. What used to be the guarded domain of programmers, researchers, and college students—the Internet—is now a platform for billion-dollar industries. A recent report released by the University of Texas at Austin estimated the current value of the Internet-based commerce industry at \$300 billion, far surpassing what seemed to be outrageous estimates offered only two years ago. The U.S. Commerce Department predicts that by 2002, the combined business-to-business and customer-based e-commerce sector will represent more than \$1.8 trillion. Oracle Corporation’s founder and CEO, Larry Ellison, correctly gauged this shift years ago and positioned Oracle to transition all of its product offerings to Internet distribution standards—a bold and visionary move for an international leader in databases, applications, and services with more than \$8.8 billion in revenue at stake.

In today’s world, preparing individuals and organizations to decide on and deal with bold moves is the imperative, however. Particularly in education where more than 4,000 years of tradition are poised to realize the promise of on-demand information access, powerful instructional and interaction tools, and technology infrastructures that will break the shackles of time, place, role, and bureaucracy. Moreover, as new entrants into the world of education—e.g., Sylvan, University of Phoenix, Disney University, and Kaplan—vie for a piece of this \$600 billion industry, pressures to respond to the growing needs of what

educational consultant and author Michael Dolence calls the “learning age” are mounting.

This press for change, however, can have serious negative individual and organizational consequences. Individuals are rushed into technology adoption with little to no orientation or training, and organizations jump into multimillion-dollar administrative and academic software implementations with no clear vision or plan. The cost in terms of employee stress, productivity, and turnover are immeasurable. The effects in terms of organizational success can be literally catastrophic. It’s somewhat of a paradox, however—individuals and organizations alike are feeling the stress and impact of not moving fast enough, while simultaneously watching with trepidation the suffering of others who have moved too quickly.

As CEOs and leadership teams are challenged by their boards, communities, and students to successfully “tame technology,” many have come to share the conclusion that this issue is no longer one of technology change, but of individual and organizational transformation. It’s no longer about technology management, but leadership in the information age. Put simply, as the rates of technology innovation and the ensuing transitions quicken, it becomes as important to outfit your organization with the capacity to manage change as it is to secure the best ERP or CRM solution.

In an effort to enable our relationship with your organization to be more successful, we offer the following fundamental transformation strategies drawn from business, education, and human development literature, and our work with organizations and individuals worldwide. In our experience, a common understanding of the dynamics of organizational and individual transformation found in the following sections on Attitude, Alignment, and Actions will help our work together “make the grade” in terms of successful transformation. We encourage you to use this document during the selection, implementation, and maintenance stages of our relationship, as we work together to enable your organization to achieve its vision and move boldly into the new millennium.

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ATTITUDE

Both individual and organizational attitudes toward change are vital to success in times of transition. On the individual level, some employees seem to relish the new and novel, while others shrink in fear. Correspondingly, some organization’s seem to nimbly adapt to internal and external change, while others remain doggedly entrenched.

Others have referred to what we call organizational attitude as organizational culture, climate, or even spirit (e.g., see Margaret Wheatley’s work on Chaos Theory). Whatever the term, the following attitude-focused strategies will better prepare your institution and employees to deal with the transitions driven by technology. Unfortunately, some institutions jump quickly into structured

planning processes without considering the items that follow, which can cause key challenges during the change process.

Catalyze the Conversation

Higher Education has long held thoughtful and critical conversation as a high value. More recently, business has adopted this perspective with the inclusion of cross-functional teams and multi-level strategic planning groups. Whatever the form, Higher Education leaders that want to successfully manage change find venues and vehicles to catalyze constructive conversations—particularly about transition drivers such as information technology that inspire reactions from deep desire to depression.

As these conversations progress, leaders are challenged to focus on the thoughtful critics and careful advocates. This is easier said than done, however. All too often, dialog on change—particularly technological change—can be dominated by either true believers who inflate expectations or angry cynics for whom any change is unwanted. Moreover, these conversations are influenced by other reactions to change. For example, you can almost track the stages noted by Elizabeth Kubla Ross—the eminent researcher who outlined the stages people deal with as they face death and dying—in many Higher Education technology conversations.

People deep in *denial* will tell you “technology in education is a fad.” Those wrestling with *anger* will lash out at any notion that technology can improve educational quality. The *bargaining* stage is replete with people who are fine with technology, as long as it remains buried in the halls of the administration building. *Depression*, unfortunately, inspires some to move on from the academy, as they mourn the loss of their way of teaching or reaching students. Fortunately, most reach *acceptance* and become thoughtful leaders in the infusion of technology—and they retain their healthy skepticism, which keeps the true believers in check.

Without open and vital dialog, change in the academy is almost always met with resistance. There are several vehicles to engage useful conversation. The key, however, is working to foster a positive organizational culture that openly, honestly, and thoughtfully addresses the pros and cons of any technology. As the conversation progresses, however, it is equally as important to take the next step.

Take Control

Psychologists have long noted the power of internal vs. external locus of control in personal development. The theory holds that people with an internal locus of control have a sense that they can influence what happens in their life, they have a sense of personal efficacy. Conversely, people with a predominant external locus of control tend to be victims, sure that they are subject to the whim of chance or the will of others. Students with an internal locus of control will say they “earn” a good grade, whereas students with an external locus of control will

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argue they were “given” a poor grade. Almost every study on this phenomenon argues that a stronger sense of internal locus of control (within reasonable levels) leads to better psychosocial development and personal growth.

The theory can easily be extended to organizations. Almost all software purchases are motivated either by the *desire* to realize the benefits promised by the software or *desperation* in relation to some perceived threat or mandate—or some mix of the two. The challenge for proactive and positive change management is that the negative, desperation-based, external locus of control modes of supporting change leads to victim-like behavior that challenges the best of organizations to successfully select or implement technology solutions. The “we have to” or “we’re being forced to” mentality leaves those “saddled with” making the technology work more likely to resist change and notice or create problems at every step.

To foster more productive organizational transformation, proactive leadership will move the organization toward an internal locus of control. This means connecting the process of selecting and implementing technology solutions to part of a larger effort or grander vision. A research university may point to the technology initiative as part of an effort to develop state-of-the-art primary research protocols. Teaching college leaders may emphasize that the technology efforts are taken to provide new and improved options to expand the teaching and learning capacity of the institution. A community college president may point to the move as integral to meeting changing community needs. Whatever the strategy, making the selection and implementation process part of the proactive plan of the institution is more likely to arm both Oracle and your institution with a powerful attitudinal tool for success.

Foster Balance

Fostering balance is the lead phrase of the growing Wellness Movement in education, led most notably by the Fetzer Institute. Individuals and organizations alike are recognizing the benefits of placing emotional, physical, psychological, and spiritual well being on a par with educational dedication. Their results show that academic excellence is promoted with this more holistic, balanced approach.

However, “I just want to make sure we maintain a healthy balance,” is sometimes doublespeak for “let’s not work too hard.” That is not the intent of this suggestion. Rather, Tushman and O’Reilly, in their 1997 Harvard Business School book, Winning through Innovation: A Practical Guide to Leading Organizational Change and Renewal, note that achieving true balance is extremely hard work. These authors argue that modern organizations are challenged to develop a sort of “organizational ambidexterity,” simultaneously paying attention to and nurturing their culture, while scrutinizing their processes and systems; paying honor to their traditions, while quickly adapting to

These authors argue that modern organizations are challenged to develop a sort of “organizational ambidexterity,” simultaneously paying attention to and nurturing their culture, while scrutinizing their processes and systems; paying honor to their traditions, while quickly adapting to environmental demands; advocating high technology, while doggedly supporting high-touch connections.

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The ability to see value in these opposites and apply equal attention to each pole is essential to the development of the kind of broad-based organizational support that a major transition requires. For example, in Higher Education, both academic and administrative employees must feel that their concerns are being addressed or the true power of an integrated ERP solution can never be realized. Our experience makes it clear, caring more about the technical rather than human implications of software and hardware selection can be devastating in the long run for any organization—and the reverse is equally true.

Mine Diamonds

In Alan Cooper's 1999 book, *The Inmates are Running the Asylum: Why High Tech Products Drive us Crazy and How to Restore the Sanity*, he states that “the successful professional for the twenty-first century is either a business-savvy technologist or a technology-savvy businessperson.” To apply this maxim to our task of managing change, mining your organization or community for education-savvy technologists or technology-savvy educators is vital to take on transition. Moreover, when choosing technology companies with which to do business, be sure to require these same characteristics.

These are the diamonds, the key employees or partners that will help your organization take on challenges as never before. By focusing attention on finding, retaining, and supporting individuals with these characteristics, you will be more likely to be successful. As any educator or professional consultant who has witnessed a successful ERP implementation will tell you, the outcome can be attributed as much or more to key individuals, the diamonds, as to organizational preparation or vendor selection. Be sure to engage these individuals in key roles and reinforce their efforts at every turn. Egalitarian values aside, we all know that there are certain individuals that can rise above the rest and make major projects successful. Just as finding personal mentors or champions can change your life on an individual level, finding and cherishing organizational “diamonds”—whether they are internal or external—will certainly pay off in the long run.

Promote Service

There is something magic about the notion of service. As a tool to pull individuals and organizations together, it is unparalleled in its power. Stories abound about transformations driven by the notion of service to others. George Bernard Shaw put it best:

This is the true joy in life...being used for a purpose recognized by yourself as a mighty one...being a force of Nature instead of a feverish selfish little clod of ailments and grievances complaining that the world will not devote itself to making you happy...I am of

the opinion that my life belongs to the whole community and as long as I live it is my privilege to do for it whatever I can.

In dealing with massive change, we tend to look inward and not consider how the change with which we are wrestling can work to help others. Challenge your team, and us, to continually consider how technology or broader transformational efforts can improve service to others.

For example, Steven Gilbert, President of the Teaching, Learning, and Technology (TLT) Group, an affiliate of the American Association of Higher Education, has leveraged the notion of service to help colleges and universities deal with one of the most pressing technology challenges—support services. TLT is working with hundreds of Higher Education institutions to encourage students to enroll in a service learning class in their MIS or CIS curricula, whereby they could serve as a resource to faculty or staff who need support with technology. Combining this notion with the Oracle Academic Initiative (www.oracle.com/oai) curriculum programs would allow your organization to create an innovative solutions for ongoing support issues. Oracle trained students could serve as key organizational resources and obtain valuable experience in the meantime.

Experience shows us that the promotion of service combined with efforts to catalyze conversation, take control, foster balance, and mine diamonds will help develop positive and productive attitudes on both the individual and organizational levels. And, as stated, building on this foundation, your institution is well prepared to engage in more structured transition efforts that fall within the realm of Alignment.

ALIGNMENT

Some may think that a dream customer for a company like Oracle is an institution with a lot of money to spend and little direction. As appealing as this prospect may be to some, we take a more conservative view. In the long run, unfocused institutions without a clear sense of their vision, values, goals, plans, or control systems pose a daunting challenge. They are the least likely to successfully implement and utilize the powerful tools offered by ERP vendors. We may be able to make the sale, but they will be hard-pressed to “make the grade.”

Therefore, as we work with institutions in their selection, implementation, and service processes, we offer five key questions. These questions will help both of our organizations manage critical individual and organizational issues that surround any major transition.

Some may think that a dream customer for a company like Oracle is an institution with a lot of money to spend that wants us to show it exactly how to expend those resources on our software and services. As appealing as this prospect may be to some, we take a more conservative view.

Why?

There has been more written about the power of organizational mission and vision in the last twenty-five years than almost any other topic in organizational theory. From Senge to Hammer to Covey, authors have noted that the ability to describe clearly and cogently the core elements of mission and vision enables institutions to plot a “true north” for transition.

With the realization of the power of mission and vision, “why?” becomes a vital question. Why is the institution in operation? And, why is this transition necessary to continue in its efforts? To successfully navigate change, these questions and their answers must be clearly articulated and supported by the organization. Any quality planning effort begins with these core questions. And, based on our experience working with Higher Education, this common ground is best obtained by inclusive strategies that solicit ideas and input from across a college or university.

We hold the passionate belief that Internet computing is an elegant solution that enables Higher Education institutions to finally integrate long separated processes and people through a common enterprise system that offers robust, scalable, and broad-based functionality at much lower total cost of ownership.

Next, why do Oracle solutions fit into the transition plans? This is the vision/value match. We have learned that without this connection at a core level, working with any institution to select and implement technology is tenuous at best. For example, Oracle has committed itself to Internet computing. We hold the passionate belief that Internet computing is an elegant solution that enables Higher Education institutions to finally integrate long separated processes and people through a common enterprise system that offers robust, scalable, and broad-based functionality at much lower total cost of ownership. If, however, your institution is still wed to the vision/value of client-server computing, then we do not have a good match. On the other hand, if our strategy fits with your vision/value beliefs, then we will be better armed to work together to design the best solution for your institution.

Ways?

Colleges and universities are beginning to complement their efforts to clarify mission and vision with an exploration of the core values or principles upon which they operate. This common understanding is a powerful tool against which to judge ongoing transitional decisions.

For example, Haywood Community College (NC) engaged an institution-wide process to define core values. They assigned students, faculty, staff, and students to teams and had each group develop a list of core values—beliefs about the ways in which the organization should act. These lists were then presented to a synthesis team, which then developed the following institutional values statement:

In all we do, we will challenge each other to demonstrate our core values:

*Learning
Student-Centeredness
Excellence*

Innovation
Integrity
Community
Positivity

Combining their vision, mission, and values, this institution is able to ask hard questions about any organizational transition or technology purchase: Is this new technology going to improve and expand learning? Will it focus on students? Does it promote excellence? Is it innovative? Can we measure outcomes? Will it maintain our sense of community? Is it something we can be optimistic about?

You may arrive in a technological destination, but may wonder why you wanted to go there in the first place.

What?

Goals are what bring mission, vision, and values into focus. The most notable study on individual goal setting involved a 1950s graduating class of Yale University. As part of a larger study, the graduating class was asked who among them had specific written-down goals. A mere three percent responded “yes.” In a follow-up study completed on the same cohort more than 25 years later, this three-percent cohort had achieved more honors and accumulated more wealth than the remaining 97 percent of the class. Clearly, there is power in goal setting.

Steven Covey notes that the power of goals lies in their ability to initiate a control system. He uses the example of an airplane that takes off from Los Angeles on its way to Hawaii. It sets its navigation system to the coordinates in Hawaii—the goal—and takes off. The majority of the time, the plane is actually off course. The control system, operating much like a thermostat in your home, continually corrects the direction until the plane successfully reaches the destination. As those who have moved through major technology transitions in Higher Education can attest, the lack of specific goals as a control system can lead to extensive journeys “off course.”

Thus, experience and research support the notion that any transition effort must articulate short- and long-term goals. Moreover, the goals must be closely linked with mission, vision, and values. There is great danger in pursuing stated or unstated goals that do not link to the greater purpose of the organization. You may arrive in a technological destination, but may wonder why you wanted to go there in the first place.

How?

There are several quality documents on strategic planning. Moreover, Oracle Consulting and a host of other companies offer these same services. With this in mind, we will not delve into a detailed discussion of this process here. However there are some key items to keep in mind as you begin detailed planning efforts.

First, keep all tactical decisions connected to mission, vision, values, and goals. Also, remember that the longest any detailed transition plan involving technology is useful is 18 months or less. Elliot Massie, the editor of the TechLearn newsletter, cogently states that any strategic planning that focuses longer than 18 months in today's climate of change is a waste of time. Be sure to detail initial and replacement financing strategies for all efforts. And, remember that training plans are a must. While they are often not considered, training is regularly the most costly and problematic issue in major organizational transitions.

The ideal customer is an institution that combines a positive organizational culture with a tough-minded focus on its mission, vision, values, goals, plans, and control systems—an organization that harnesses the power of attitude and alignment.

How are We Doing?

Developing a control system to keep the process of alignment alive is essential to maintaining momentum. Indeed, several organizations refer to their planning materials as "living documents." Institutions skilled in change management determine and review key metrics for all elements in their planning and goal setting. They involve others in holding all involved—including vendors—accountable to key objectives.

This step is the key to harnessing the power of Alignment. All too often organizations do a great job of developing plans, but these plans do not serve the institution in the long run. Somewhere in process they become disconnected, they move out of alignment with the institution's mission, vision, values, and goals. Creating a system for spotting misalignment is vital. The ERP field is replete with stories of software selection, implementation, or maintenance efforts that suffered from a lack of alignment, letting personalities, politics, or pressure alter vital organizational priorities.

As stated, the ideal customer for Oracle Higher Education is not one with deep pockets and no direction. The ideal customer is an institution that combines a positive organizational culture with a tough-minded focus on its mission, vision, values, goals, plans, and control systems—an organization that harnesses the power of attitude and alignment.

ACTIONS

High-performing organizations that harness the power of attitude and alignment are well positioned to take the actions necessary to make the grade in the information age. In this time of transition, strategic actions taken on a firm foundation outfit an institution of Higher Education to be a formidable consumer of and leader in information technology.

Leaders in these organizations realize that showing up is job one. They cannot avoid technology or its implications. They must provide solid leadership that leverages socialization, communication, and participation to involve administrators, faculty, and staff more prominently in transition efforts. Transition leaders at all levels are skilled in gathering fiscal and other

operational resources from local, state, and national governments, foundations, and corporations.

Transition leaders are also quality benchmarkers, looking to other institutions to find best practices in change management of all kinds—including technology selection and implementation. As they implement their planning strategies, they continually think and act holistically, constantly connecting seemingly disparate solutions. They dog the details, but are flexible enough to realize when strategy is not working. Under these circumstances, they quickly and easily move on to alternate techniques.

An important feature of successful transition leaders is that they know how to leverage early success. Once the momentum of major transition begins, if months and years go by before benefits are realized, the effects can be devastating for credibility and momentum. Obtaining quick wins is one reason why institutions of Higher Education may choose something like Oracle's FastForward implementation—a preconfigured, rapid ERP installation technique. With FastForward, they quickly see the rewards of an ERP system and are still able to further configure the applications using Oracle workflow technologies. This early return on investments is another attractive benefit of CampusOnline, an offsite hosting option available to Higher Education that significantly reduces the time, effort, and cost of ERP implementation.

In short, we look forward to tackling transitions with your institution and working together to “make the grade” in the new millennium.

Finally, individuals and organizations with the capacity to successfully manage transition realize that they must maximize—meaning that change is hard work. And, as they engage this work, they constantly (1) reflect on attitude and alignment, (2) reconnect with vision, mission, values, and goals, and (3) correct the areas that need to be adjusted. And, most important, they are mindful of opportunities to celebrate and honor those who work hard to help the institution succeed during these challenging transition efforts.

WORKING TOGETHER TO MAKE THE GRADE

As the final year of the 20th Century comes to a close and rapid change in the way we work, play, and learn continues to sweep across the landscape, we hope that the strategies outlined here are useful in efforts to prepare your organization for the transitions ahead. By fostering positive attitudes, developing institutional alignment, and taking strategic actions, we can surely bring out the best in the technology transitions. It is our goal that our collaborative efforts with Higher Education will enable high-quality teaching and learning, state-of-the-art research, comprehensive student services, and effective institutional management. In short, we look forward to tackling transitions with your institution and working together to “make the grade” in the new millennium.



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